

WORLD POST COURSE MAP

Sales Mobility Online Training



TOUR WITH WORLD POST

OVERVIEW

LESSON 1.0 COURSE OVERVIEW

- THE CAST
- COURSE ROAD MAP
- NAVIGATION

INTRODUCTION

LESSON 2.0 THE CN50 HANDHELD HARDWARE

- CHARGING THE HANDHELD
- SIM & SD CARDS
- STYLUS & KEYBOARD

LESSON 2.1 PROGRAMS & BASIC SETTINGS

- THE DASHBOARD
- BASIC SETTINGS
- PROGRAMS
- RESETTING THE HANDHELD

LESSON 2.2 CONNECTIONS & MESSAGES

- WIRELESS MANAGER
- MESSAGES

LESSON 2.3 PHOTOS & VIDEO

- TAKE PHOTOS
- USE PHOTO OPTIONS
- MAKE VIDEOS

LESSON 2.4 POCKETJET 6 PLUS PRINTER HARDWARE

- COMPONENTS
- BUTTONS & LIGHTS
- BATTERY & CARRIER

LESSON 2.5 USING THE POCKETJET 6 PLUS PRINTER

- BINDING & CHARGING
- LOADING PAPER
- BEST PRACTICES

DAILY PLANNING

LESSON 3.0 STARTING YOUR DAY

- SYNCING
- ENTERING MILEAGE
- CHECKING YOUR SCHEDULE
- CHECKING ACCOUNT DETAILS

THE EVALUATION

LESSON 4.0 STARTING THE EVALUATION

- ARRIVING
- ADDING A NEW EVALUATION
- EDITING OPTIONS
- EXTRAS & ADD-ONS

LESSON 4.1 EVALUATIONS & RE-EVALUATIONS

- SITE & PROPERTY
- MANAGERS & ORGANIZATION
- DETAILS & PARAMETERS
- RE-EVALUATIONS



THE PRESENTATION

LESSON 5.0 CREATING THE PROPOSAL

- SELECTING PRODUCTS
- DETERMINING PRICING
- SCHEDULING DELIVERY
- PRINTING OR EMAILING

LESSON 5.1 PAYMENTS

- PAYMENT OPTIONS
- PAYMENT PROCEDURES

LESSON 5.2 FINANCING

- CREATING ESTIMATES
- COMPLETING AGREEMENTS
- OTHER FINANCING FUNCTIONS
- FOLLOWING THE RULES

LESSON 5.3 COMPLETING THE SALE

- SELECTING ITEMS TO SELL
- GETTING SIGNATURES
- PRINTING DOCUMENTS
- UNSELLING A PROPOSAL

LEADS & FOLLOW-UP

LESSON 6.0 ADDING A LEAD & SCHEDULING AN ACTIVITY

- ADD A LEAD
- SCHEDULE AN ACTIVITY
- RESCHEDULE AN ACTIVITY

LESSON 6.1 ELECTRONIC SIGNATURES

- INITIATING A REQUEST
- THE CUSTOMER SIDE
- STATUS & FOLLOW-UP

