

# Regional Training Agenda

Join us at The Fountains at Piedmont for a deeper dive into optimizing what FieldEdge can do for your business! Continental breakfast, coffee, and lunch will be provided each day. (Agenda subject to change)

## THURSDAY, MARCH 23RD

**Breakfast**  
8AM-8:45AM

**Eliminating Common Bottlenecks**  
8:45AM-9:45AM

Mastering Settings & Employee Permissions

**Group Breakout Activity**  
9:45AM-10:15AM

**Optimizing the FieldEdge Experience**  
10:30AM-12PM

Learn the Layout with Templates and Forms  
Pricebook is Key to Success

**Equipment Best Practices**  
1PM-1:45PM

Maximize equipment management

**Jobs**  
1:45PM-2:30PM

Manage longer term projects  
Understand job costs and progressive billing

**Measuring Success**  
2:45PM-3:30PM

Reporting & List Views  
Future Features

## FRIDAY, MARCH 24TH

**Breakfast**  
8AM-8:45AM

**Efficient Dispatching**  
8:45AM-9:45AM

Maximize the Tools of the Dispatch Board

**FieldEdge Mobile Survival Guide**  
10AM-11AM

Technician Workflow & Best Practices

**Advanced Selling**  
11AM-12PM

Multi-option Quoting & Intro to Proposal Pro

**Invoicing & Profitability**  
1PM-2PM

Reviewing WO's & Invoicing from Office

**Part Requests & Expenses**  
2PM-2:30PM

Tracking Job Specific Purchases

**Service Agreements & Automation**  
2:45PM-3:30PM

Save Time on Outreach & Increase Renewals