

FieldEdge Boost!

A one-day virtual group training providing foundational and intermediate knowledge to give your team the Boost they need to use FieldEdge effectively.

Tuesday, December 13th
9AM - 4PM EST

Optimizing FE **9AM - 9:45AM EST**

We'll start by walking through all of the settings in FieldEdge to teach you where to go and how to make adjustments as needed. We'll also dive into communication templates to ensure you using FieldEdge to effectively message your customers.

Advanced Selling **9:45AM - 10:30AM EST**

Find out everything you need to know about creating items, setting up spiffs, building bundles, and utilizing them to create multi-option quotes in office. We will dive into the features of FieldEdge Premier to help your business drive revenue.

Jobs **10:45AM - 11:15AM EST**

Find out how to streamline larger projects by using the jobs module within FieldEdge. Progressively bill and manage multiple work orders under one project.

Efficient Dispatching **11:15AM - 12:00PM EST**

The key to dispatching quickly and efficiently is understanding how the Book for Later feature works with Skills and Tasks. In this segment we will explore how these concepts along with tags, advanced dispatch filters, and slide out panel features can optimize your dispatching process.

Lunch Break **12PM - 1PM EST**

Mobile App **1PM - 1:45PM EST**

Are your techs using the most out of the mobile app? If your technicians are not using part requests, expenses, payments, supervisor mode, and non-billables, this session is for you!

Part Requests **1:45PM - 2:30PM EST**

Keep track of all your job-specific purchases in one place. Utilizing Part Requests as Purchase Orders, see how FieldEdge can save Accounts Payable time by posting as bills.

Service Agreements **2:45PM - 3:30PM EST**

Learn everything you need to know to take charge of your Agreements within FieldEdge. Uncover the ins and outs of building and scheduling, as well as setting up communication templates to automatically notify your customers when they are due for maintenance.

Reporting **3:30PM - 4PM EST**

Make the most out of FieldEdge Premier by learning how to report on equipment, modify reports by adding filters and columns, changing sort orders and groupings, and even calculating summaries.