FieldEdge Deep Dive

A one-day training on more advanced topics not covered in our Boost! trainings.
Great for intermediate and advanced users!
(Please note: All QuickBooks segments are based on QB Enterprise for desktop)

10:00AM - 5:00PM EST
Hosted via Zoom

QuickBooks 201
10:00AM - 10:45AM EST

QuickBooks doesn't have to be intimidating. See how classes, associated pay items, terms, taxes, payment methods, customer records, vendors, and more can be easily handled with FieldEdge.

Inventory 101 in FieldEdge
10:45AM - 11:30AM EST

Find out everything you need to know about inventory and non-inventory items, cost and average cost, assemblies and flat rate, and categories and markups. You'll also see how part requests can help you succeed in FieldEdge.

Inventory 101 in QuickBooks
11:45PM - 12:45PM EST

So your items are set up in FieldEdge, now what? It's time to start tracking your inventory in QuickBooks. We'll review everything from inventory item setup to purchase orders to vendor bills and warehouse tracking.

Reporting
12:45PM - 1:15PM EST

Maximize features of Premier by learning how to modify reports using added filters and columns, changing sort orders and groupings, and saving custom views.

Lunch Break
1:15PM - 2:15PM EST

Jobs
2:15PM - 3:15PM EST

Find out how to streamline larger projects by using the Jobs module within FieldEdge. Learn about the different methods of billing, how to manage multiple work orders under one project, all of the reports available, and dive into job costing.

Behind the Scenes
3:30PM - 4:00PM EST

Some features like, Business Units, Agreement Reserves, and Equipment Discounting for agreements, don't fit for everyone and that is why they stay in the background. We'll cover these features at a high-level to help you understand some of the qualifiers and limitations to see if they might work for your business.

What's New
4:00PM - 5:00PM EST

We're going to take time here to cover some of the latest feature enhancements to FE. Learn about Cash Discounting, the FE Repository, and other updates rolled out in the last few months!

FieldEdge
by xplor