

# Virtual Regional Training Agenda

Each topic session is recorded and will be available for your convenience. Lunch break from 12pm-1pm ET both days.

## WEDNESDAY, DECEMBER 14TH

9AM-4PM ET

### Customer Tracking & Management

- Core Customer Entry
- Advanced Customer Information

### Dispatching & Tech Tracking

- Getting Ready to Dispatch
- Setting up Technicians
- Maximizing the EDB

### Invoicing & Quoting

- The Quote Flow
- The Ins & Outs of Invoices
- Understanding Your Invoices
  - Jobs

### Agreement Creation & Tracking

- Setting up Tasks
- Creating Agreements
- Dispatching & Invoicing in 3 Easy Clicks

## THURSDAY, DECEMBER 15TH

9AM-3PM ET

### Inventory Setup and Tracking

- Core Item Creation
- Advanced Inventory Information
- Flat Rate Pricing & How it Works
  - Entering your initial Inventory
  - Ordering Parts

### Mobile Techs & Manager Apps

- Getting Ready to use the ESC Mobile Apps
  - Mobile Tech Workflow

### Reporting

- Reporting on Customers, Dispatches, Agreements & Sales

### Q & A