FieldEdge Deep Dive

A brand new, one-day training on more advanced topics not covered in our regional or Boost! trainings.

Thursday, December 1st, 2022
10AM - 5PM EST

QuickBooks 201
10AM - 11AM 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
11AM - 12PM 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
12PM - 1PM 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.

Lunch Break
1PM - 2PM EST

We'll keep the line open, so you can network with other attendees during the lunch break!

Phone Integration
2PM - 2:30PM EST

Unleash the power of call tracking within FieldEdge. Know who's calling, track and record incoming calls and communicate with your customers effectively with this Integration.

Business Units
2:30PM - 3PM EST

Whether your business has multiple locations, or you just want to track multiple departments, Business Units within FieldEdge provide the ability to report your business segments individually.

Agreements & Reserves
3PM - 4PM 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 tracking Reserve funds.

Payroll
4PM - 4:30PM EST

Streamline your payroll process with FieldEdge time tracking, eliminating the need for paper timesheets and manual entry.

Show Me the Money
4:30PM - 5PM EST

See how an integrated payment processing solution can help save you time from the office and the field, and even get you paid faster. If you haven't started using DocuSign, you'll get to see it in action, too!

FieldEdge
by xplor