Regional Training Agenda

Join us in beautiful Tampa, FL 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)

WEDNESDAY, MAY 17TH

Breakfast
8AM-8:30AM

Eliminating Common Bottlenecks
8:30AM-9:30AM
Mastering settings & employee permissions

Group Breakout Activity
9:30AM-10:15AM

Optimizing the FieldEdge Experience
10:30AM-12:00PM
Learn how to maximize communications, use reminders, and create custom forms

Equipment Best Practices
1:00PM-1:45PM
Maximize equipment management and master reporting

Jobs
1:45PM-2:15PM
Manage longer term projects
Understand job costs and progressive billing

Measuring Success
2:30PM-3:00PM
Create custom reports & list views

Service Agreements & Automation
3:00PM-4:00PM
Save time on outreach & increase renewals

THURSDAY, MAY 18TH

Breakfast
8AM-8:30AM

Efficient Dispatching
8:30AM-9:30AM
Maximize the tools of the dispatch board

FieldEdge Mobile Survival Guide
9:30AM-10:15AM
Technician workflow & best practices

Advanced Selling
10:30AM-11:30AM
Master multi-option quoting & pricebook success

Quickbooks 201
11:30AM-12:00PM
Behind the scenes in QB desktop (settings)

Invoicing & Profitability
1:00PM-2:00PM
Reviewing WO's & invoicing from office

Part Requests & Expenses
2:00PM-3:00PM
Learn the ins and outs, including brand new functionality

Q&A with FE
3:15PM-4:00PM
Final Q&A and future roadmap preview

FieldEdge by xplor