

Regional Training Agenda

Join us at The Beacon Center for a deeper dive into optimizing what FieldEdge can do for your business! Continental breakfast and coffee will be provided each day, and lunch will be provided Tuesday and Wednesday. (Agenda subject to change)

TUESDAY, OCT 4TH

Breakfast

8AM-8:45AM

Eliminating Common Bottlenecks

8:45AM-10:15AM

Mastering Settings & Employee Permissions

Optimizing the FieldEdge Experience

10:30AM-12PM

Tips to Improve Customer Communications
Learning the Layout with Templates and Forms
Pricebook is Key to Success

Finding Hidden Cash

1PM-2PM

Money Your Business Has Already Earned
Academy Plus Preview

Creating a Legacy

2PM-2:45PM

Realizing the Big Picture
Improving Company Culture

Measuring Success

3PM-3:30PM

Reporting & List Views

WEDNESDAY, OCT 5TH

Breakfast

8AM-8:45AM

Efficient Dispatching

8:45AM-9:45AM

Maximize the Tools of the Dispatch Board

FieldEdge Mobile Survival Guide

10AM-11AM

Technician Workflow & Best Practices

Invoicing & Profitability

11AM-12PM

Reviewing WO's & Invoicing from Office

Advanced Selling

1PM-2PM

Multi-option Quoting & Intro to Proposal Pro

Part Requests & Expenses

2PM-2:30PM

Tracking Job Specific Purchases

Service Agreements & Automation

2:45PM-3:30PM

Save Time on Outreach & Increase Renewals

THURSDAY, OCT 6TH

Breakfast

8AM-8:30AM

Jobs & Longer Term Projects

8:30AM-9:30AM

Large Quotes
Change Orders
Progressive Billing

Manage Inventory like a Pro

9:30AM-10:15AM

Inventory Management in QuickBooks (Desktop)

Exclusive FieldEdge Roadmap Preview

10:30AM-11AM

What Does the Future Look Like?

Final Q & A

11:00AM-12PM