FieldEdge Boost!

A one-day virtual group training providing foundational and intermediate knowledge to give your team the Boost they need to use FieldEdge effectively.

9:00AM - 4:00PM EST
Hosted via Zoom

Optimizing FE
9:00AM - 9:45AM EST

We'll start by walking through all of the settings in FieldEdge to teach you where to go and how to make adjustments as needed. We'll also dive into communication templates to ensure you using FieldEdge to effectively message your customers.

Efficient Dispatching
9:45AM - 10:15AM EST

The key to dispatching quickly and efficiently is understanding how the Book for Later feature works with Skills and Tasks. In this segment we will explore how these concepts along with tags, advanced dispatch filters, and slide out panel features can optimize your dispatching process.

Mobile App
10:30AM - 11:15AM EST

Are your techs using the most out of the mobile app? If your technicians are not using part requests, expenses, payments, supervisor mode, and non-billables, this session is for you!

Advanced Selling
11:15AM - 12:00PM EST

Find out everything you need to know about creating items, setting up spiffs, building bundles, and utilizing them to create multi-option quotes in office. We will dive into the features of FieldEdge Premier to help your business drive revenue.

Lunch Break
12:00PM - 1:00PM EST

Jobs
1:00PM - 1:30PM EST

Find out how to streamline larger projects by using the jobs module within FieldEdge. Progressively bill and manage multiple work orders under one project.

Part Requests
1:30PM - 2:15PM EST

Keep track of all your job-specific purchases in one place. Utilizing Part Requests as Purchase Orders, see how FieldEdge can save Accounts Payable time by posting as bills.

Service Agreements
2:30PM - 3:15PM 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 setting up communication templates to automatically notify your customers when they are due for maintenance.

Templates & Reporting
3:15PM - 4:00PM EST

Make the most out of FieldEdge by effectively communicating with your customers and maximizing features of Premier by learning how to modify reports using added filters and columns, changing sort orders and groupings, and saving custom views.

FieldEdge
by xplor