Hands-on Training Offering

Enterprise Course Descriptions for Conference Training

Note: Courses must have at least 5 participants to be held.

Elevating Enterprise Insights: Advanced Dashboard Techniques

INTERMEDIATE **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 2 - 2:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 2 – 2:45 p.m.

Description: This course focuses on leveraging summary and formula fields to craft sophisticated dashboards with advanced gadgets. Explore advanced techniques tailored for intermediate users to enhance data visualization and analysis within the Enterprise environment. Empower users to create advanced dashboards displaying key performance indicators (KPIs) and critical information for informed decision-making and robust business analysis. Gain proficiency in utilizing summary and formula fields to manipulate data and create dynamic visualizations within dashboards. Learn how to customize dashboards to meet specific organizational needs and maximize their effectiveness in driving strategic

Navigating Enterprise Administration: A Guide for App Admins

BEGINNER **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 2 - 3:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 2 – 3:45 p.m.

Description: This immersive course will focus on the customization of layouts and grids using advanced features such as action links, formula fields, note fields, summaries, and more in Enterprise. Explore the role and benefits of custom fields in enhancing data management and user experience within your software. Understand the significance of custom fields in optimizing data management and enhancing user experience. Gain practical knowledge through a step-by-step guide on creating and configuring custom fields within the software. Learn how to seamlessly integrate custom fields into layouts and grids to improve data presentation and usability. Engage in hands-on exercises applying learned concepts to real-world scenarios. Discuss common challenges and troubleshooting techniques related to custom fields and layout customization.

Maximizing Revenue: Best Practices & Feature Updates in Enterprise

INTERMEDIATE **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 2 - 3:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 2 – 3:45 p.m.

Description: This course is an in-depth exploration of revenue management. Delve into the intricacies of the revenue cycle and receive expert recommendations on best practices. Navigate the full revenue cycle and better understand best practices for optimal financial management. Explore the latest updates and enhancements in financial modules, understanding their value and impact on revenue strategies.

Enterprise Best Practices: From Service Order Initiation to Work Order Execution and Delivery

BEGINNER **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 3 - 3:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 3 – 3:45 p.m.

Description: This course is a comprehensive exploration of best practice workflows. Gain actionable strategies tailored to streamline your organization's operations. Discover best practices for efficient planning, encompassing the journey from service order initiation to work order execution and delivery.

OSB Configuration: Optimizing Booking Roles & Restrictions

ADVANCED **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 3 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 3 – 5:45 p.m.

Description: This course is dedicated to advanced Online Space Booking (OSB) configurations. Delve into sophisticated techniques for managing booking roles and implementing restrictions to enhance space utilization. Gain a comprehensive understanding of Online Space Booking configuration and the capabilities of Content Builder. Learn how to identify and create pivotal booking roles tailored to your organization's needs. Master the implementation of booking restrictions based on space availability and requirements.

Enterprise Best Practices: From Lead Generation to Contract Finalization

BEGINNER **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 4 – 4:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 4 – 4:45 p.m.

Description: This course is a comprehensive exploration of best practice workflows. Gain invaluable insights into optimizing processes tailored to your organization's needs. Explore best practices for venue sales, covering the entire journey from lead generation to contract finalization.

Enterprise Layout & Grid Customization: Harnessing the Power of Custom Fields

INTERMEDIATE **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 4 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 4 – 5:45 p.m.

Description: This course is designed to empower App Admins with the knowledge and skills needed to effectively manage Enterprise and will cover key administrative tasks, best practices, and strategies for optimizing Enterprise to meet your organization's needs. Gain a thorough understanding of Enterprise's administrative features, functionalities, and capabilities. Learn how to configure user permissions, security settings, and customization options to align with your organization's requirements and policies. Explore advanced administration techniques for managing integrations, data governance, and system maintenance. Acquire practical insights and strategies for troubleshooting common issues, resolving challenges, and maximizing the performance of Enterprise.

Inventory Management in Enterprise: Consolidation, Efficiency, and Maintenance

INTERMEDIATE **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 4 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 4 – 5:45 p.m.

Description: This course is designed to equip participants with knowledge and skills needed to effectively organize and account for inventory in Enterprise. The course will cover key aspects such as inventory tracking, transaction management, and the implementation of robust organizational practices. Learn best practice recommendations to streamline inventory management, enhance accuracy, and improve overall operational efficiency. Gain knowledge on enhanced inventory organization (systematically categorize and maintain accurate, up-to-date inventory records); effective transaction management (strategies for managing and accurately documenting various inventory transactions); and implementation of best practices (discover and apply industry best practices to improve inventory management efficiency and reduce errors).

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Enterprise Best Practices: From Scheduling Events and Mastering Functions to Calendars

BEGINNER **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 5 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 5 – 5:45 p.m.

Description: This course is a comprehensive exploration of best practice workflows. Delve into actionable strategies designed to enhance efficiency and productivity within your organization's operations. Gain fundamental insights into best practices suitable for beginners, focusing on scheduling events and mastering functions and calendars.

Elite Course Descriptions for Conference Training

Note: Courses must have at least 5 participants to be held.

Empowering App Admins: Mastering Elite

BEGINNER **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 2 – 2:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 2 – 2:45 p.m.

Description: This course is designed to empower App Admins with the knowledge and skills needed to effectively manage Elite. Explore key functionalities, configuration options, and best practices to optimize Elite for your organization's needs. Gain a comprehensive understanding of Elite's administration features and capabilities. Learn how to configure user permissions, security settings, and customization options to tailor Elite to your organization's requirements. Discover advanced tips and tricks for troubleshooting common issues and optimizing system performance. Acquire strategies for staying up-to-date with Elite updates and enhancements to continuously improve system functionality.

Elite Detailing Techniques

INTERMEDIATE **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 2 – 3:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 2 – 3:45 p.m.

Description: Tailored for intermediate users, this course provides expert guidance on data entry, industry-specific best practices, and customized strategies, diving deep into the detailing tab. Explore the intricate nuances of the Elite platform while acquiring invaluable tips and tricks to streamline your detailing process for enhanced efficiency. Uncover strategic uses for items, instructions, instruction sets, and packages to optimize your detailing workflow. Maximize efficiency by leveraging function types for precise output customization.

Streamlining Processes: Unleashing the Elite DocuSign Integration

BEGINNER **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 3 – 3:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 3 – 3:45 p.m.

Description: This course is dedicated to mastering DocuSign integration. Explore beginner-friendly strategies to maximize efficiency through DocuSign Templates. Discover how to seamlessly integrate a payment portal link into your DocuSign documents for added convenience and functionality. Unlock the full potential of your DocuSign integration, enhancing workflow efficiency and effectiveness. Gain insights into leveraging DocuSign Templates to streamline document processing.

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Access vs. Distribution: Utilizing the Operations Daily View and Function Schedule Calendar in Elite

INTERMEDIATE **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 4 – 4:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 4 – 4:45 p.m.

Description: This course will dive into the transformative potential of combining Daily Operations View with the Function Calendar. By integrating real-time insights and detailed function schedules, organizations can propel their operational excellence, empowering individuals with direct access to critical event information and streamlining internal distribution processes. Attendees will develop skills to create curated views in the Operations Daily View and Function Calendar to optimize information displayed for various team members. Gain insights into unique ways of sharing event changes and evolving needs in real-time while setting up critical notifications and email triggers within Elite.

Elite Inventory Integrity

INTERMEDIATE **$100 / 90€**

North America Date & Time: Wednesday, September 18, 2024, 4 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 4 – 5:45 p.m.

Description: Tailored for intermediate users, this course provides a deep dive into inventory management in Elite. Optimize inventory setup that will allow for better reporting. Explore advanced audit procedures and best practices for all verticals. Discover specialized F&B inventory management techniques and the potential of GL code utilization for enhanced financial tracking. Develop expertise in conducting comprehensive inventory audits across various departments, categories, items, packages, instruction sets, revenue streams, and service charges. Gain insights into maintaining inventory integrity and implementing industry-leading practices to ensure accurate reporting.

Mastering Internal Event Requests in Elite: Maximizing 'Prospect' Status Efficiency

INTERMEDIATE **$50 / 45€**

North America Date & Time: Wednesday, September 18, 2024, 5 – 5:45 p.m.
EMEA Date & Time: Wednesday, 30 October 2024, 5 – 5:45 p.m.

Description: This course will delve into the intricacies of utilizing the 'Prospect' status within your internal event request workflow. Explore the entire process, from initiating bookings to thorough reviews, alongside seamless acceptance or rejection procedures, all integrated with notifications and email functionalities. Gain insights into optimizing space requests within Elite without the necessity for additional integrations. Acquire techniques to effortlessly manage user requests, eliminating the need for transitions between hold/tentative and confirmed/definite events. Unlock the full potential of your Elite functionality to streamline your space management process efficiently.

North America Illuminate
Sept 16 – 18, 2024
Baird Center, Milwaukee, Wisconsin

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EMEA Illuminate
28 – 30 Oct 2024
Royal Jaarbeurs, Utrecht, The Netherlands

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