

SHAFERS SUMMIT

Our class descriptions have been organized to help you identify the classes that best suit your expertise level and area of interest. We have color coded the difficulty of the classes for ease of reference. All classes are delivered in a Group Live format. Unless otherwise noted, advanced preparation and prerequisites are not required.



Overview: This learning level provides a general review of a subject using a broad perspective.



Basic: This learning level is most beneficial to attendees new to a skill or module.



Intermediate: This learning level is beneficial to attendees that are looking to build on their knowledge.



Advanced: This learning level is most useful for seasoned users that have a solid handle on the subject.

At this conference, participants will:

Discover industry best practices on a variety of topics.

Master new ways to track inventory.

Improve your usage of Business Analytics.








Develop the knowledge you need to manage your payroll and equipment efficiently.

In addition to categorization by learning difficulty, you will find a few other tags to help identify the sessions that best suit your needs.









CPE Credit: If a class is offered that provides CPE credit we will use this icon and show what field of study the credit covers and how many credits are provided.

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Monday, October 3	Session Name	Session Description	Session Info
7:00 AM - 8:30 AM	Breakfast & Registration	Breakfast & Registration	
8:30 AM - 9:15 AM	Welcome Address	Explorer and JDM's leadership teams provides an update on the past year and shares the roadmap for the future.	
9:25 AM - 11:00 AM	Mobile Pro	Come learn about MobilePro, which empowers your service technicians to work remotely on any mobile device. We'll show you all the feature in this new module and what you'll need to run it.	
11:15 AM - 12:15 PM	Dispatch in a Browser	Our team has been hard at work developing the new Dispatch module. We'll showcase the capabilities that this new board provides for you.	
12:15 PM - 1:15 PM	Lunch	Lunch	
1:15 PM - 2:45 PM	Shafers Basics & System Utilization	In this session we will discuss some tips and tricks to help you more effectively use your Shafers system and help prevent potential issues from occurring. We'll go over data backup, setup files, system and server maintenance, and more!	
3:00 PM - 4:00 PM	Make your Inventory Module work for you	Join us for an overview of how to get the most out of your Inventory Module. We'll demonstrate how easy it is to keep track of items purchased, sold, current on hand quantity, and item value.	 CPE 1.5 Production
4:00 PM - 5:00 PM	All About Accounting	This comprehensive session about all things accounting. Our experts will discuss new features, enhancements, and share tips and tricks for getting even more from core modules like AR, AP, Payroll, General Ledger and Check Book.	 CPE 1.5 Accounting
5:00 PM - 5:30 PM	Open Discussion	Questions may be addressed to the Shafers team, our customer expert, or to fellow users. To help us make the most of our time together, we ask that you submit questions ahead of time. Click here to submit your questions now.	
6:30 PM - 9:00 PM	Welcome Reception & Dinner	Welcome Reception & Dinner	

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Tuesday, October 4	Session Name	Session Description	Session Info
7:30 AM - 8:30 AM	Breakfast	Breakfast	
8:30 AM - 9:15 AM	Business Analytics: Basics	If you have ever spent too much time trying to create specialized reports or wished for an easier way to analyze and extract data from your Shafers Database, you are not alone. Many people find gathering and compiling data intimidating. Business Analytics allows you to create customized reports to provide meaningful insights into your business.	 CPE 1.5 Accounting
9:25 AM - 11:00 AM	Business Analytics: Advanced	Want to take your custom reports and data analysis to the next level? Join us for this Advanced Business Analytics class. Learn to quickly build reports by selecting data fields, filtering, formatting, and saving views. We'll delve into advanced features such as creating custom formulas, linking to other database fields, nested filters, advanced formatting, security, and more.	 CPE 1.5 Accounting
11:15 AM - 12:15 PM	Keynote: Empathetic Leadership - Be Happier & More Profitable By Doing Less	Be happier and more profitable by doing less. Join Esther Thomas and Cara Stallard of David White Services, a female-owned business, as they share their insights for Empathetic Leadership and how they use Shafers in their daily decision-making process to manage their business and make all their employees happier. A handout, with steps you can take when you go back to your business, will be available, so you can apply their suggestions.	 CPE 1.5 Business Mgmt & Org
12:15 PM - 1:15 PM	Lunch	Lunch	
1:15 PM - 2:15 PM	Maintenance Agreements	Understanding how to work with the Maintenance Agreement module so it works for you and streamlines your Maintenance Agreement tracking, scheduling, and billing. Learn the process that the module follows to help you get the most out of using Maintenance Agreements.	
2:30 PM - 3:15 PM	Flat Rate Basics	In this session, you will learn the basics for establishing your Flat Rate Scenarios. We will also discuss how to share/integrate the Flat Rate Scenarios with your Shafers Back Office and Mobile technicians and keep your Flat Rate Scenarios up to date.	
3:15 PM - 3:45 PM	Open Discussion	Questions may be addressed to the Shafers team, our customer expert, or to fellow users. To help us make the most of our time together, we ask that you submit questions ahead of time. Click here to submit your questions now.	

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Attendee substitutions can be made at any time at no charge. No refunds for cancellations or no-shows. For more information or any questions regarding our policies, please contact us at connections@explorer-software.com

Classes subject to change without notice
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