

# 2019 ASPEN Advancement Regional Training

Attend an ASPEN Advancement Regional Training session to master ASPEN basics.

## What is ASPEN Advancement?

ASPEN Advancement focuses on core training: the basic functions needed for each department. Learn tips and tricks that help employees complete tasks faster. This training is primarily daily transaction focused.

## What's the difference between ASPEN Advancement and the ASPEN User Conference?

ASPEN Advancement provides a comprehensive, affordable option including hands-on practice of concepts. The topics covered are geared toward helping daily users of the software become more proficient in their jobs, saving the company time & money so they can better service customers. The ASPEN User Conference will focus on advanced managerial topics, product roadmap discussions, unstructured lab time to address individual issues, and increased networking opportunities including roundtable discussions.

## Overview of Class Schedule

### Monday – Parts

- Tips & tricks: reduce POS transaction time (including dropship orders)
- Best practices: parts ordering and receipts, including multi-location transfers
- Streamline daily tasks using ASPEN functions and selection screens
- Benefits of using serialized parts & physical inventory basics

### Tuesday – Service

- Tips & tricks: data entry on work orders, using tasks, messages, locking and other functions
- Best practices: work order creation & using the clock
- Shortcuts for starting, finding and managing work orders
- Standard rates, warranty best practices and service scheduling (as time permits)

### Wednesday – Accounting

- Tips & tricks: journal entries, ROAs and voucher entries
- Best practices: month end routines, parts & units payable, service charges & month end statements
- Basic reporting and drill down, including improving your daily balancing routine
- Utilizing lists, messaging and tasks to create efficiencies, streamlining account reconciliations & settlements

### Thursday – Sales/Units

- Tips & tricks: utilizing lists and selection screens to pinpoint opportunities
- Best practices: unit purchasing (including quoting unit templates) & managing customer interactions
- Streamlining work by using tasks, messages and other functions
- Tracking quotes and pipeline & margin reporting and analysis

### Friday (half day) – Rental

- Tips & tricks: rental entry and selection
- Best practices: depreciation configuration and posting
- Roadmap for rental workflow, rental contract basics
- Review rental's impact on the unit record



## Attend ASPEN Advancement at one of three locations:

### Dubuque, IA - November 4th thru 9th



Early bird special ends: September 24th



Registration cutoff date: October 4th

### Allentown, PA - November 18th thru 22nd



Early bird special ends: October 8th



Registration cutoff date: October 18th

### Minneapolis, MN December 2nd thru 7th



Early bird special ends: October 22nd



Registration cutoff date: November 1st

## Why should I attend?

- Become familiar with new ASPEN features. We've added over 100 new features in the last year alone!
- Learn how to streamline processes – work smarter, not harder.
- Be confident you are using ALL of ASPEN functionality.
- Master tips and tricks that improve efficiency in every department.

## Who should attend?

- Any employee who has hands-on, daily use of ASPEN.
- New employees who started after ASPEN training was conducted, or those who have switched departments or roles within the organization.
- Anyone who has not attended an ASPEN User Conference in the last two years.
- Any company that isn't taking full advantage of all of ASPEN's capabilities.



# ASPEN Advancement Regional Training Registration & Payment Form



## REGISTER NOW!

### Early Bird and Multi Class Discounts Available!

Mon - Thurs per person/day - \$350 (Early Bird Special - \$280)  
 Half Day (Friday) per person - \$180 (Early Bird Special - \$145)  
 Register for 3 or more classes and get an extra 10% discount!

Email [barb.harwell@chartersoftware.com](mailto:barb.harwell@chartersoftware.com) or  
 call 303.932.6875 ext. 200 to register now!

Dealership Name  Phone #

Attendee Names


Training Location


Mon Tues Weds Thurs Fri (1/2 Day)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Please use additional sheet of paper if there are more than 5 attendees.

Please read our cancellation policies carefully for your protection.

**CANCELLATION POLICY:**  
 Cancellations are fully refundable up to 45 days prior to training date. No refunds within 45 days of the training date. Substitution of participants permitted with advance notice to Charter. Hotel reservations subject to hotel policy and are attendee's responsibility. Charter is not responsible for refunds on canceled travel. Lunch is not included. Participants are responsible for providing their own laptops for training.

Please total the number of sessions and enter them below.

**EARLY BIRD SPECIAL (45+ DAYS before training)**

\_\_\_ # Full Days (Mon - Thurs) @ \$280 \$ \_\_\_\_\_

\_\_\_ # Half Day (Fri) @ \$145 \$ \_\_\_\_\_

**REGULAR PRICING (less than 45 days prior to training)**

\_\_\_ # Full Days (Mon - Thurs) @ \$350 \$ \_\_\_\_\_

\_\_\_ # Half Day (Fri) @ \$180 \$ \_\_\_\_\_

3 or more classes - 10% Discount \$ \_\_\_\_\_

**TOTAL AMOUNT** \$ \_\_\_\_\_

**Questions? Call us at 303.932.6875 ext. 200**