

For Microsoft Dynamics® CRM Partners



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•	EXPAND AND ENHANCE YOUR MICROSOFT DYNAMICS CRM SALES	
•	WORKS ONLINE OR ON-PREM, WHICHEVER YOUR PREFERRED MODEL	
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	DUT FIELDONE SYSTEMS LLC	
ABO		
•	COMMITMENT TO PARTNERS	
•	Introducing FieldOne	
•	Introducing FieldOne SKY	
•	THE FIELDONE FOCUS	
PART	TNER BENEFITS AND REQUIREMENTS	4
•	FieldOne Referral Program	4
•	FIELDONE SALES ASSOCIATE PARTNER	4
•	FIELDONE AUTHORIZED IMPLEMENTATION EXPERT PARTNER	
•	FieldOne Master Partner	
SALE	ES & MARKETING	
	FIELDONE PARTNER INCENTIVES	4
	SELLING TECHNICAL SUPPORT	
•	Sales Training	
•	Forecasting and Business Planning.	
•	Marketing	
•	Marketing to Your Customers	
•	PROPOSE-A-PROGRAM MARKET DEVELOPMENT GRANTS	
•	PARTNER COMMUNICATIONS	
•	Marketing Tools	
•	Marketing "Air Cover"	
•		
IMPL	PLEMENTATION	10
•		
•	FIELDONE STP (SUBCONTRACT TO PARTNER) PROGRAM	10
•	Partner Implementation	10
RESC	OURCES	11
•	FIELDONE PARTNER PORTAL	1
•	TECHNICAL SUPPORT	12
FIELD	DONE SOFTWARE	12
•	What It Does	12
•	Scheduling & Routing Resources.	
•	DISPATCH	
•	Workflow	
•	Notifications	
GETT	TING STARTED AS A FIELDONE PARTNER	12
_	Is this for you?	1.
•	HOW DO LIGHT STARTED?	12

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## Welcome

**FieldOne** offers you the opportunity to deliver new capabilities to any client who has the need to schedule and route resources and/or people to be in the right place at the right time with the most efficient workflow. This includes literally hundreds of industries, including:

Air Conditioning Repair	Air Duct Cleaning	Alarm and Security	Appliance Repair
Building Maintenance	Carpet Cleaners	Chimney Service	Computer Repair Services
Computer & IT Services	Electrical Services	Fire & Water Restoration	Floor Polishing & Waxing
Furnace Repair & Service	Garage Door Service & Installation	Glass Repair	Handyman Services
HVAC Janitorial & Cleaning	Kitchen Exhaust	Landscaping	Lawn & Grounds Maintenance
Maid Service	Medical & Appliance Services	Network Installation Service	Painting
Pest & Environmental Control	Plumbing	Pool & Spa	Power Washing Service
Pressure Washing	Property & Facilities Management	Restoration	Roofing
Satellite Dish Installation	Security & Communications	Septic Tank Cleaning	Snow Removal
Telephone Installation	Tree Maintenance	Upholstery Cleaning	Water Treatment
Water Proofing	Window Cleaning		

Each of these businesses **need to schedule and route people, parts, products and more** between various customer, depot and other locations. The more efficiently they can do so, the more customers they can service while reducing costs at the same time. That spells increased profitability for your client, the most compelling reason to engage you and FieldOne.

## Expand and enhance your Microsoft Dynamics® CRM sales

Since FieldOne Sky is built on the industry-leading Microsoft Dynamics CRM 2011 platform, this is an excellent way for existing Microsoft Partners to expand and enhance their CRM practice. For others this is a great way to kick start a new practice for your firm. Not only can you increase sales of Microsoft products, you can also leverage this driver to cultivate and improve your relationship with Microsoft.

## Works online or on-prem, whichever your preferred model

Choose how you prefer to deliver FieldOne services.

- Install FieldOne SKY at the client's site & build a host of implementation, maintenance & support services around it
- Sell your clients FieldOne cloud-delivered services

Whichever way you choose to deliver, FieldOne is there to support you in delivering, deploying & supporting the solution.

## Simple Partner Requirements

Customers who have anywhere from a few dozen to a few thousand resources to schedule and route will appreciate it when you show them FieldOne SKY. If you already hold the Silver or Gold Microsoft CRM Competency, or simply wish to refer opportunities and earn fees, get started with FieldOne today by contacting us at partners@fieldone.com.



## **About FieldOne Systems LLC**

### Ommitment to Partners

FieldOne recognizes the value of the channel and has established this program to demonstrate our recognition and our commitment to it. While we do have a small direct field sales force focusing on very large corporate clients, we do not conflict with the primary markets that our channel partners are unbeatable at serving. In fact, our direct sales people are incented to bring opportunities in those markets to partners.

As you will learn further along in this program guide, we provide every kind of support a channel partner expects from an ISV (Independent Software Vendor) and more. You'll find not only technical training and support, but marketing support, sales training, co-operative demand generation programs, lead and opportunity sharing, deal registration and protection, and our FieldOne Authorized Implementation Expert Program in which we bring projects from our direct sales force and other partners to those partners who step up to investing in higher levels of training and preparedness.

We truly want to be your best partner, because we are building the best possible channel program to promote our technology and build increasing profits for our partners and ourselves.

## Introducing FieldOne

FieldOne takes Professional Service Automation (PSA) systems to the next level, delivering full automation of the scheduling, routing, dispatching, and tracking of all service-related entities including field service technicians, parts, products and all related processes. Our solutions are designed for companies who have anywhere from several dozen to several thousand resources that require scheduling, and who want to be able to analyze detailed reporting on the movement of these resources to continuously refine their processes and improve their productivity.

Delivered on-premises or from our cloud-based Software as a Service (SaaS) system, FieldOne solutions provide users with tremendous flexibility and innovative features like GPS tracking, mobile data entry, inventory control and automatic invoice creation.

Built on the powerful Microsoft Dynamics CRM 2011 platform, FieldOne also integrates well with many standard PSA solutions, MSP (Managed Service Provider) platforms, ERP (Enterprise Resource Planning), billing and other systems already have in place.

## Introducing FieldOne SKY

FieldOne takes Professional Service Automation (PSA) systems to the next level, delivering full automation of the **scheduling**, **routing**, **dispatching**, **and tracking of all service-related entities** including field service technicians, parts, products and all related processes. Our solutions are designed for companies who have anywhere from several dozen to several thousand resources that require scheduling, and who want to be able to analyze detailed reporting on the movement of these resources to continuously refine their processes and improve their productivity.

Delivered on-prem or from our cloud-based Software as a Service (SaaS) system, FieldOne provides users with tremendous flexibility & innovative features like **GPS tracking, mobile data entry, inventory control & automatic invoice creation.** 

### Output The FieldOne Focus

The economic business climate we live in requires that we all do more with less in order to survive. Inefficiencies are no longer simply an inconvenience; they can mean the difference between business survival or failure.

Our goal is to provide service companies and their employees with tools that will help them make the most efficient possible use of their schedulable resources, making sure that everybody and everything is in the right place at the right time doing the right thing in the best possible way. This requires very smooth, well coordinated flow of tremendous amounts of information. FieldOne solutions provide exactly that.

We eliminate duplicate entry of data which reduces chances for error. This also frees up personnel to focus on providing more attention and better service to their customers. While FieldOne solutions integrate well with related platforms, we also remove the need to maintain many different systems by integrating their functions all into one convenient, easy-to-use and comfortable user interface.



## **Partner Benefits and Requirements**

FieldOne Partners enjoy the opportunity to provide their clients with a highly differentiated, innovative, and powerful set of routing, dispatch, workflow, and tracking capabilities that will significantly augment their ability to deliver quality services to their customers.

Implementing our solutions returns handsomely to partners in the form of new license revenues, ongoing recurring revenue services, and a host of professional project services including strategic planning and consulting, implementation, data migration, user training & support, and much more. To earn these and other benefits will require investments in training not only on our software, but also in the sciences of logistics, routing, workflow, and more. FieldOne provides all the necessary training, but it is up to you, the partner, to determine how deeply you wish to invest in growing your resource scheduling and field service management practice, and how much of the return on investment you wish to enjoy.

To make it possible for each partner to choose the level of involvement that is right for their business, we offer four tiers of partnership:

## FieldOne Referral Program

At this level you and your team need only to learn how to "talk the talk."

FieldOne provides extensive training and tools to help your salespeople, consultants and engineers learn how to talk knowledgeably about field service management, routing, and workflow. Should you encounter an opportunity you need only to refer it to FieldOne. When the deal closes you will enjoy compensation equaling 10% of the recommended reseller price of the software sold in the deal.

This level offers no marketing or technical support other than to answer questions your people may have to help them recommend FieldOne to their clients.

### SieldOne Sales Associate Partner

FieldOne Sales Associate Partners commit to the successful completion of training required to enable them to proactively and effectively market and sell FieldOne solutions to their clients.

FieldOne Sales Associate Partners will enjoy a host of sales and marketing support including our innovative Propose-A-Program Marketing Funds, lead and opportunity introductions, demand generation activities, sales training, and more.

The FieldOne Sales Associate Partner is a marketing and sales partner to FieldOne and is not required to attain the ability to implement and deploy the software. FieldOne Sales Associate Partners may also separately pursue FieldOne Authorized Implementation Expert

Partner status enabling them to install, implement and integrate FieldOne solutions not only for their own customers, but for other customers referred by FieldOne and other Sales Associate Partners as well.

#### **Reseller Discount**

FieldOne Sales Associate Partners obtain software licensing directly from FieldOne at a discount of 20% off our recommended resale prices. By achieving quarterly sales goals that margin can increase to as much as 35%. Partners are free to integrate these licenses into their own comprehensive solutions package which allows them to set price as they see fit. Enterprising partners enjoy superior margin performance by offering a complete "bundled" package to their clients which cannot be price-shopped and offers clients a simplified, predictable, budgetable solution.

### **Use FieldOne for Implementation & Support**

FieldOne Sales Associate Partners also enjoy a discount of 25% on the sale of FieldOne Implementation and Support services delivered by members of the FieldOne Professional Services team. These resources will provide the complete complement of services required to successfully install, implement, integrate, deploy, train and support customers in the use of FieldOne technologies.

### **Use F1 Authorized Installation Expert Partner for implementation**

FieldOne Sales Associate Partners may also elect to form partnerships with FieldOne Authorized Implementation Expert Partners to provide installation, implementation, training, support and other services to their customers. FieldOne will provide introductions and sample boilerplate partnering agreements that partners may elect to modify to their own specific requirements and execute to assure both partners of a healthy, mutually productive and mutually beneficial relationship.



## FieldOne Authorized Implementation Expert Partner

FieldOne Authorized Implementation Expert Partner status enables qualifying partners to install, implement, integrate, train and support FieldOne solutions not only for their own customers, but for other customers referred by FieldOne and other Sales Associate Partners as well. Significant investments of engineer time are required to enroll and participate in a series of training experiences and pass specific practical and written tests. At the end of this training, partner personnel will be prepared to properly and professional implement complete FieldOne solutions, qualifying them to receive assignments directly from FieldOne, or to partner with FieldOne Sales Associate Partners on projects.

#### FieldOne Master Partner

FieldOne Authorized Implementation Expert Partners may take additional training including several practical experiences that focus on the sophisticated routing and workflow capabilities of FieldOne technologies. Upon successful completion of training and testing these partners become FieldOne Master Partners who are capable of executing on far higher level routing and workflow projects often required by larger and more experienced FieldOne clients. Fees for these services are significantly higher than those obtainable by FieldOne Authorized Implementation Expert Partners which more than justifies the expense and time investment required to achieve this level of mastery.



## Sales & Marketing

FieldOne treats channel partners as part of our sales team. We provide the marketing support you need to pave the path, the sales training you need to prepare to go out and sell, and the expert resources to support your sales process. Of course, that all starts with the incentives:

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#### FieldOne Partner Incentives

The FieldOne Partner Incentive program is simple. You want new software and services to sell to your existing customers so you can increase your return on investment in building each relationship. You also want to attract new customers.

We want you to use FieldOne software and services to accomplish those goals.

To make it worth your while we offer everything from a simple 10% referral fee for those who do not wish to make any investments in training yet, to a 30% discount for those who become expert at selling our solutions.

We also offer a highly competitive rate to our partners who elect to become experts and masters at implementing FieldOne soutions. We'll engage them to be part of our delivery and deployment team. You can become one of them by enrolling your technical personnel in training right away.

There are great moneymaking opportunities waiting at every level of the FieldOne Partner Program:

#### FieldOne Referral Program

When you refer a customer to us, FieldOne pays a fee of 10% of the recommended reseller price of the software sold in the deal.

#### FieldOne Sales Associate Partner

FieldOne Sales Associate Partners may purchase and resell FieldOne software and services and enjoy an increasing discount based on the volume of their sales.

#### Reseller Discount

FieldOne Sales Associate Partners obtain software licensing directly from FieldOne at a discount of 20% off our recommended resale prices.

When the total volume of sales of FieldOne software and services exceeds \$50,000 in a fiscal quarter, the partner will receive a rebate equaling another 5% of the recommended resale price their FieldOne sales in that quarter.

When total sales volume of FieldOne software & services exceeds \$100,000 in a fiscal quarter, the partner rebate is increased by another 5% of recommended resale price of FieldOne sales in that quarter, a total margin of 30%!

### Use FieldOne for Implementation & Support

FieldOne Sales Associate Partners also enjoy a discount of 25% on the sale of FieldOne Implementation and Support services delivered by members of the FieldOne Professional Services team. These resources will provide the complete complement of services required to successfully install, implement, integrate, deploy, train and support customers in the use of FieldOne technologies.

#### Use a FieldOne Authorized Installation Expert Partner for implementation

FieldOne Sales Associate Partners may also elect to form partnerships with FieldOne Authorized Implementation Expert Partners to provide installation, implementation, training, support and other services to their customers. FieldOne will provide introductions and sample boilerplate partnering agreements that partners may elect to modify to their own specific requirements and execute to assure both partners of a healthy, mutually productive and mutually beneficial relationship.

#### FieldOne Authorized Implementation Expert Partner

FieldOne Authorized Implementation Expert Partners receive \$100 per hour when tasked by FieldOne to deliver and deploy FieldOne software and service solutions. For each project FieldOne will provide a project plan that specifically defines the number of hours required for completion. Partners may request adjustments to these plans before commencement if they disagree with the work effort specified, or during the project should they encounter unforeseen obstacles and delays.



#### FieldOne Master Partner

FieldOne Master Partners receive \$150 per hour when tasked by FieldOne to deliver and deploy advanced FieldOne software and service solutions. For each project FieldOne will provide a project plan that specifically defines the number of hours required for completion. Partners may request adjustments to these plans before commencement if they disagree with the work effort specified, or during the project should they encounter unforeseen obstacles and delays.

Payment rate is determined by the level of partner required and specified by FieldOne, not the resource assigned by the partner.

#### **Special Deals**

FieldOne sales executives will work directly with partners to establish special pricing for exceptionally large volume projects.

## Selling Technical Support

FieldOne recognizes that services attached to our software are the source of the major share of revenue to your company. Many FieldOne partners have taken the time and made the investments necessary to learn how to properly and effectively deliver and deploy FieldOne solutions.

Still, others have not.yet made these investments. The opportunity to earn service dollars still exists by selling FieldOne-provided services both for implementation as well as ongoing support.

#### FieldOne-provided Implementation Services & Maintenance Programs

FieldOne Associate, Expert and Master partners may resell FieldOne Implementation Services and Maintenance Programs at the same discount as FieldOne software. These sales count toward the quarterly sales volume rebate as well.

#### Partner-provided Implementation Services & Maintenance Programs

FieldOne Sales Associate and other partners may elect to partner with other FieldOne partners to provide necessary services to their customers.

The FieldOne Expert and Master authorization levels qualify partners as having demonstrated the ability to properly and effective install, implement, and integrate FieldOne solutions. It is recommended that Sales Associates or other partners seeking a partner to implement FieldOne solutions for your customers select only those who have made the investments necessary to obtain these credentials.

#### **Selling Technical Education**

Many of your customers will want to become more proficient at higher levels with FieldOne. Soon we will introduce a selection of courseware and training experiences that you will be able to sell to your customers. Of course, you may wish to establish your own user training offerings.

## Sales Training

As part of the FieldOne sales organization we want to make sure that we've provided the best possible preparation and training to help you and your salespeople become more adept at identifying FieldOne opportunities, pursuing them, penetrating them, and closing them.

FieldOne sales training doesn't stop at features & benefits, speeds & feeds, or bits and bytes. We take partners through the development of a comprehensive sales process that increases your likelihood of success dramatically.

FieldOne sales training is made available through regularly scheduled webinars and scheduled live events in our New Jersey-based US headquarters, easily accessible via Newark Airport.



## Forecasting and Business Planning

Your FieldOne Partner Manager works with you to identify opportunities existing within your own customer base. Working together we build a robust pipeline of opportunities and track our progress to your success. As your business grows our technology experts work with yours to properly plan capacities and capabilities as necessary. To protect your hard work, we have established important policies and procedures to prevent channel conflict:

#### **Cooperative Selling**

Members of our Executive, Management, and Sales teams are available to join with you on sales calls. This may be accomplished via teleconference, webconference, and videoconference. For larger opportunities members of our team will join you in person to visit with your customer to help provide necessary information and close the deal.

## Marketing

Enabling your sales begins with providing the best possible marketing materials and strategies to help you generate demand and pave the path toward sales.

## Marketing to Your Customers

The FieldOne Partner Portal provides easy access to all FieldOne collateral materials. Your FieldOne Partner Manager can also assist you in creating customized materials that weave FieldOne technologies into your own offerings providing your customer with a unified solution. We also provide a selection of email templates and other tools you can customize to present your solutions that involve FieldOne products.

## Propose-a-Program Market Development Grants

FieldOne Partners who wish to identify new prospects are welcome to submit their proposal for marketing assistance from FieldOne. Based on the quality of the proposal and later on track record of successful fulfillment of previous programs, FieldOne may or may not furnish a grant of marketing funds. Partners may be asked to match our grant. Proposals should include the following:

#### **Intended Audience**

What size company? Specific vertical? What makes them a good target?

#### **Key Messaging & Value Propositions**

What do you want to convey to this audience? How will it promote sales of FieldOne solutions and related services?

#### **Nature of the Activity**

Email campaign? Calldowns? Webinar or Seminar events? We look for a campaign with continuity that continues contacting prospects until they respond positively. One-shots don't work.

#### **Promotion Strategy**

How do you plan to attract your target prospects to your campaign?

#### Costs

The more specific, comprehensive and thorough you are, the better your chances of receiving approval.

#### **Anticipated Return**

FieldOne is happy to invest in marketing programs that generate revenue. How much revenue can we realistically expect to see generated by your proposed marketing activities?

#### Followup Strategy

What is your strategy for making sure that you penetrate each new prospect? How will you follow up?

#### **Activity Timeline**

From planning to deal closures, how long will the campaign run? What are the milestones? Have you allowed enough time between steps? What are the critical paths that must be achieved?

#### Partner Communications

FieldOne commits to providing an ongoing stream of new information as we continue to improve upon and expand our products. You'll always have earliest notification of what's on our roadmap so you can properly plan to provide the best service automation solutions to your customers.



## Marketing Tools

As a FieldOne partner you'll have complete access to customizable versions of many of our available collateral items, including:

- FieldOne Overview Brochure
- Positioning Paper How to Sell FieldOne SKY
- Press Release Kits
- End-Customer Webinars
  - Hosted by you
  - Hosted by FieldOne
- Technical workshops
- Vertical Data Sheets
- Maintenance and Repair Services
- Logistics

## Marketing "Air Cover"

FieldOne advertises regularly in several publications including "Field Technologies Magazine" and on their website. We also contribute or help our partners to participate in various industry-related trade shows and similar events. Contact us for more information on events, and check the FieldOne.com website for more information about our upcoming appearances.



## **Implementation**

FieldOne Sales Partners who don't have implementation skills onboard at their company never need to hesitate to aggressively pursue sales. We've made sure you have plenty of attractive options for getting our solutions installed and implemented.

## SieldOne Implementation Services

We're probably presenting your last resort first, but FieldOne Services can always provide the installation and implementation services your customer requires. Your discount on our services will match your product discount and all services sold will count toward your Quarterly Incentive Program.

Utilization of FieldOne Implementation Services requires adequate lead time so it is important that you explore our other options to accommodate customers who may require faster response.

## FieldOne STP (Subcontract to Partner) Program

FieldOne Authorized Expert Implementation Partners are often subcontracted by FieldOne to implement sales executed by our direct salespeople and also by Sales Associate partners. We will gladly furnish FieldOne Sales Associates with a list of available FieldOne Authorized Expert Implementation Partners with whom you can contract to execute installations, implementations, and other support services.

## Partner Implementation

Many FieldOne Sales Associate Partners soon realize that there are significant additional revenue opportunities associated with the delivery of services surrounding FieldOne solutions. The best way to enhance and expand your FieldOne practice is to add service capability to your portfolio.

#### Training, Certification and Authorization

The path to adding services is through training of your personnel leading to certifications which qualify you for authorization as an Expert or Master Partner. Training may be taken online or at our facilities in New Jersey.

#### **Training Requirements**

Since FieldOne SKY is based on Microsoft Dynamics CRM 2011, it is required that companies seeking FieldOne Partner authorization already hold the Gold or Silver Competency in Microsoft Dynamics CRM 2011.



## Resources

As a FieldOne Partner you will have access to a wide variety of resources to help you recommend, market, sell, implement, and support FieldOne solutions.

### FieldOne Partner Portal

The FieldOne Partner Portal is your primary point of contact for access to all FieldOne resources. Here you'll find the forms necessary to register new opportunities, marketing collateral, sample proposals, spec sheets, and much more. Once you've completed your Partner Authorization requirements you'll be issued access IDs and passwords that will give you full access to the resources appropriate for your partner level.

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All FieldOne Partners will always have access to the appropriate levels of support required to help them recommend, market, sell, implement, and support FieldOne solutions. This includes the developers and engineers who continually improve our products, as well as our team of support experts.

#### We do not support Microsoft Dynamics CRM

It is important to note that FieldOne does not provide support for Microsoft Dynamic CRM 2011. We can assist partners in obtaining qualified CRM support, however since our partners are already Microsoft Partners with Gold or Silver competency in Microsoft Dynamics CRM 2011 they typically already have CRM support in place.

#### **Phone-based support**

FieldOne Partners will be furnished with a specific phone number to obtain direct support. It is important not to share these numbers with customers at that will only serve to overwhelm our resources making them unavailable to you. As necessary, our support organization can connect to you or your customer's network to provide support.



## FieldOne Software

### What It Does

FieldOne is an innovative, secure, scalable service management system providing field service businesses with powerful and innovative up-to-the-minute technician scheduling and status, on-site wireless data entry, complete inventory control and automatic invoice creation.

If your client's business delivers products or services to customers onsite, FieldOne is a solution you'll want to introduce them to.

## Scheduling & Routing Resources

Whether its a team of field service engineers, a fleet of delivery vehicles, parts, products, people or more, if it moves from place to place your clients will need to schedule it, creating the most time-efficient and cost-effective route to take.

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Once that's done, their Dispatchers will need to track progress from place to place, customer to customer, and job to job.

#### Workflow

In most cases, each stop along the route will involve steps in a variety of workflows all of which need to be carefully tracked to successful completion. Engineers, delivery personnel and other workers in the field will be required to update dispatch management on their progress. With FieldOne, they can easily and immediately do that from their mobile device. No waiting to get back to the office and possibly forgetting key details along the way.

#### Notifications

FieldOne may be managing the routing and the workflow, but people need to be kept aware of progress, completion, and especially exceptions. FieldOne accomplishes this with a comprehensive series of notifications delivered throughout its workflow engine using your choice of communications including IVR, mobile email, and more.

## **Getting Started as a FieldOne Partner**

## Is this for you?

If you have customers who need to schedule, route, and manage workflow for anywhere from a few dozen to a few thousand schedulable resources...

If you have already earned your Silver or Gold Competency in Microsoft Dynamics CRM 2011...

If you want to add incremental new sales to your existing CRM installed base, and grow that installed base by giving customers another reason to expand their capabilities...

Then, yes, a FieldOne Partnership is absolutely for you!

## Mow do I get started?

Contact <u>partners@fieldone.com</u> to obtain our Partner Program application, fill it out, and return it. Your FieldOne Partner Manager will contact you with next steps. It's that simple.

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