

# Simply Partnership 2010

October 21-23, 2010  
Hyatt Regency Vancouver  
Vancouver, British Columbia

## Conference Guide



# Welcome

## Welcome to Simply Partnership 2010!

Thank you for joining us in beautiful Vancouver. We're excited to join with our Sage Simply Accounting partners and certified consultants to celebrate 25 years of Sage Simply Accounting and to share ideas and strategies for the future.

One thing is certain. We're going to keep you busy. Over the next three days, you can participate in a wide range of activities designed to help you grow your business and your Sage Simply Accounting know-how. Of course you'll want to map out your conference agenda by choosing from the variety of sessions found in the back of this guide. And don't miss the keynote address, featuring Don Bell, founder of WestJet. Mingling with exhibitors and Sage staff in the trade show is always a valuable experience. You'll find all sorts of solutions and services that enhance the power of Sage Simply Accounting. Plus, don't forget to schedule your appointment in the Support Centre to have a one-to-one conversation with one of our Sage Simply Accounting gurus.

Most importantly, use Simply Partnership as an opportunity to engage with fellow consultants, industry experts, and Sage Simply Accounting team members. Plentiful networking opportunities are scheduled throughout the conference. Make the most of these interactions by asking questions, sharing ideas, and discovering how Sage Simply Accounting can improve your customers' businesses.

This is your conference! Make the most of it by expanding your network, your knowledge, and your business potential. Thank you for joining us at Simply Partnership.

Best regards,



**Jamie Sutherland**

Vice President and General Manager,  
Sage Simply Accounting



**Jennifer Warawa**

Senior Director, Partner Programs  
Sage Simply Accounting

## Sage extends special thanks to our premier sponsors for their support of Simply Partnership 2010.

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# Agenda At A Glance

Wednesday, October 20		
4:00 p.m. – 8:00 p.m.	Conference Registration and Trade Show	Regency Foyer
Thursday, October 21		
6:45 a.m. – 5:30 p.m.	Conference Registration	Regency Foyer
7:00 a.m. – 8:15 a.m.	First-Timer Welcome Session and Breakfast	Georgia B
7:30 a.m. – 8:15 a.m.	Buffet Breakfast	Regency Ballroom
8:15 a.m. – 8:30 a.m.	Welcome with Jennifer Warawa and Darren Root (co-author of the E-Myth Accountants Edition)	Regency Ballroom
8:30 a.m. – 9:00 a.m.	General Session: 2010 – A Look Back and a Peek Forward with Jamie Sutherland	Regency Ballroom
9:00 a.m. – 9:45 a.m.	User Experience Design Lab	Prince of Wales
9:00 a.m. – 9:45 a.m.	What's New and Product Management Update	Regency Ballroom
9:45 a.m. – 10:00 a.m.	Coffee Break	Regency Foyer
10:00 a.m. – 4:00 p.m.	Trade Show	Regency Foyer & Balmoral
10:00 a.m. – 11:30 a.m.	Breakout Sessions	Scheduled Meeting Rooms
11:30 a.m. – 4:30 p.m.	Support Centre and Ideascop	Oxford
11:30 a.m. – 1:00 p.m.	Awards Luncheon	Regency Ballroom
1:00 p.m. – 2:00 p.m.	Breakout Sessions	Scheduled Meeting Rooms
1:30 p.m. – 4:30 p.m.	User Experience Design Lab	Prince of Wales
2:15 p.m. – 3:15 p.m.	Breakout Sessions	Scheduled Meeting Rooms
3:15 p.m. – 3:45 p.m.	Coffee Break and Trade Show	Regency Foyer
3:45 p.m. – 4:45 p.m.	Keynote Featuring Don Bell, Cofounder of WestJet	Regency Ballroom
5:00 p.m. – 7:00 p.m.	Welcome Reception	34th Floor Perspectives
Friday, October 22		
7:00 a.m. – 5:30 p.m.	Conference Registration	Regency Foyer
7:00 a.m. – 7:00 p.m.	Trade Show	Regency Foyer & Balmoral
7:00 a.m. – 8:00 a.m.	Breakfast and Trade Show	Regency Ballroom
8:00 a.m. – 9:00 a.m.	Breakout Sessions	Scheduled Meeting Rooms
8:30 a.m. – 4:30 p.m.	Support Centre and Ideascop	Oxford
9:00 a.m. – 4:30 p.m.	User Experience Design Lab	Prince of Wales
9:15 a.m. – 10:15 a.m.	Breakout Sessions	Scheduled Meeting Rooms
10:15 a.m. – 10:30 a.m.	Coffee Break and Trade Show	Regency Foyer
10:30 a.m. – 12:30 p.m.	Breakout Sessions	Scheduled Meeting Rooms
12:30 p.m. – 1:30 p.m.	Lunch and Trade Show	34th Floor Perspectives / Regency Foyer
1:30 p.m. – 3:00 p.m.	Breakout Sessions	Scheduled Meeting Rooms
3:00 p.m. – 3:15 p.m.	Coffee Break and Trade Show	Regency Foyer
3:15 p.m. – 4:45 p.m.	Breakout Sessions	Scheduled Meeting Rooms
5:30 p.m. – 7:00 p.m.	Cocktail Reception and Trade Show	Regency Foyer
7:00 p.m. – Midnight	Simply Stampede Theme Party	Regency Ballroom
Saturday, October 23		
9:00 a.m. – 12:00 p.m.	Conference Registration	Regency Foyer
9:00 a.m. – 12:00 p.m.	Support Centre and Ideascop	Oxford
9:00 a.m. – 10:00 a.m.	Closing Brunch	Regency Ballroom
9:30 a.m. – 11:00 a.m.	User Experience Design Lab	Prince of Wales
10:00 a.m. – 11:00 a.m.	Breakout Sessions	Scheduled Meeting Rooms
11:15 a.m. – 12:15 p.m.	It's a Wrap Keynote	Regency Ballroom

# General Information

## Special Needs

If you have special meal, special access or facility needs that we can address to make your participation more enjoyable, please let us know by visiting the Registration Desk. If you alerted us to any specific dietary requirements when you registered, the hotel has been notified of your dietary restriction. The majority of meals served during conference will be buffet-style and will be clearly labeled, with exception of the plated Awards Luncheon. If you have a dietary restriction and are unsure of the menu, please identify yourself to the Hyatt banquet staff and they can assist you. Please note that last-minute special meal requests cannot be taken onsite.

## Recommended Dress

The recommended dress code for all conference events is business casual. Please note that meeting room temperatures can vary, so please be sure to bring along a sweater or jacket.

## Professional Development (PD) Hours

PD Hours will be issued for all Simply Partnership 2010 training and sessions. Please note that a session must have educational content to qualify for PD Hours. Sage is registered with the NASBA as a sponsor of continuing professional education of the National Registry of PD Sponsors. However, State/Provincial Boards have final authority on the accreditation of individual courses. Certificates of completion will be distributed on Saturday, October 23 at the Registration Desk. If you are unable to pick up your certificate it will be mailed to you 6-8 weeks after conference. The following hours will be issued based on your attendance:

**Pre-Conference Only: 8 hours**

**Conference Only: 11 hours**

**Pre-Conference & Conference: 19 hours**

## Lost and Found

If you have misplaced a personal item during conference, please check with the Simply Partnership Registration Desk located in the Regency Foyer.

## Meal Schedule

Thursday, October 21		
7:00 a.m. – 8:15 a.m.	First-Timer Welcome Session and Breakfast	Georgia B
7:30 a.m. – 8:15 a.m.	Buffet Breakfast	Regency Ballroom
9:45 a.m. – 10:00 a.m.	Coffee Break	Regency Foyer
11:30 a.m. – 1:00 p.m.	Awards Luncheon	Regency Ballroom
3:15 p.m. – 3:30 p.m.	Coffee Break and Trade Show	Regency Foyer
5:00 p.m. – 7:00 p.m.	Welcome Reception	34th Floor Perspectives

Saturday, October 23		
9:00 a.m. – 10:00 a.m.	Closing Brunch	Regency Ballroom

Friday, October 22		
7:00 a.m. – 8:00 a.m.	Breakfast and Trade Show	Regency Ballroom
10:15 a.m. – 10:30 a.m.	Coffee Break and Trade Show	Regency Foyer
12:30 p.m. – 1:30 p.m.	Lunch	34th Floor Perspectives
3:00 p.m. – 3:15 p.m.	Coffee Break and Trade Show	Regency Foyer
5:30 p.m. – 7:00 p.m.	Cocktail Reception and Trade Show	Regency Foyer
7:00 p.m. – Midnight	Simply Stampede Theme Party	Regency Ballroom

# Conference Highlights

## Featured Speakers

Regency Ballroom

### Keynotes

Thursday, October 21 | 8:15 a.m. – 8:30 a.m.

The passion to see accounting firms succeed...the insight on how firms must improve their systems and processes. This is the path Darren Root takes each day as managing member of RootWorks LLC, founding member of Root & Associates LLC, Executive Editor of The CPA Technology Advisor, and co-author of the upcoming book *The E-Myth Accountant*.

Through a unique, holistic approach to aligning a firm's technology processes and practice management, Darren identifies the subtle differences that distinguish one firm from another. Darren developed RootWorks Education Services to help guide firms in using technology more efficiently to attract and retain more clients. Darren shares his 20 years of experience in technology, process development, and client relations with others when he talks about the Next Generation Accounting Firm™ in relation to products, services, and RootWorks Annual Leadership Community™

Thursday, October 21 | 3:45 p.m. – 4:45 p.m.

Don't miss a conversation with Don Bell, one of the four founders of WestJet. Don has always been widely considered the company's spiritual leader, a "culture guru" who champions teamwork while emphasizing an upbeat mood. Bell's ideas and leadership were instrumental in taking a Start-Up airline in 1996 to become one of the few airlines in the world to enjoy quarter after quarter of profitability and sustained double-digit business growth.

In this captivating presentation about building the optimal environment for success, Don tells audiences how a simple formula, coupled with some down to earth common sense principles, was the key to WestJet's unparalleled corporate culture and customer experience. His compelling messages about people and creating an optimal environment will provoke, enlighten, and offer great takeaway value for Simply Partnership attendees.



**Darren Root**  
CPA, CITP and CEO  
of RootWorks



**Don Bell**  
Co-founder and Former Executive  
Vice President, WestJet

### Sage Speakers

Thursday, October 21 | 8:30 a.m. – 9:00 a.m.

#### 2010 – A Look Back and a Peek Forward

Sage Simply Accounting vice president and general manager Jamie Sutherland will discuss some of the highlights of Sage Simply Accounting from 2010. Plus he'll offer insider product perspective and give you a sneak peek at some of the initiatives and direction for 2011 and beyond. You'll leave this session with a greater understanding of the state of Sage Simply Accounting, including product direction, organizational focus, strategic initiatives, areas of growth, emerging trends with small businesses, and where we need to position ourselves in the short and long-term.



**Jamie Sutherland**  
Vice President and General Manager,  
Sage Simply Accounting

Thursday, October 21 | 9:00 a.m. – 9:45 a.m.

#### What's New and Product Management Update

In this general session, you'll hear an overview of what's new in Sage Simply Accounting 2011 and how your feedback helped to define the priorities. We will also showcase key products that make up the ecosystem of solutions that complement Sage Simply Accounting functionality, and finally, you will get a high level look at what some of the next focus areas will be for Sage Simply Accounting.



**You-Sheng Kang**  
Director,  
Research & Development,  
Sage Simply Accounting



**Hugo Croft-Levesque**  
Director,  
Product Management,  
Sage Simply Accounting

## First-Timer Welcome Session and Breakfast

Georgia B

Thursday, October 21 | 7:00 a.m. – 8:15 a.m.

### Are you attending Partnership for the first time?

If this is your first time to Partnership, don't miss this special session. You're invited to join us for a hot breakfast and a warm welcome session to help you kick off a productive week of learning, networking, and discovering innovations at Partnership 2010. This invitation is open to all first time attendees, so make plans to join us even if others from your company have previously attended Partnership. At this breakfast meeting, we'll help you create a "game plan" so that you get the most out of your week.

## Awards Luncheon

Regency Ballroom

Thursday, October 21 | 11:30 a.m. – 1:00 p.m.

Raise your glass to toast the top performers among the Sage Simply Accounting certified consultant community. If you have attended our Simply Partnership conference in the past you are aware that part of the experience is the opportunity to be recognized. By popular demand from the partners who attended last year, we are bringing back our Awards Luncheon. We will be highlighting key achievements for resellers, trainers, top partners, and more.

### Partners will be recognized in the following categories:

- Top referral partner of the year (Sage Spark Rewards)
- Top reseller partner of the year
- Gold partners
- Platinum partners
- Certified Trainers
- Partner Advisory Committee
- Entrepreneurial Community Spirit Award **NEW**
- Outstanding Mentorship Award **NEW**
- And more!

## It's a Wrap Keynote

Regency Ballroom

Saturday, October 23 | 11:15 a.m. - 12:15 p.m.

This closing forum is your chance to get energized and synthesize everything you've learned before you head back to the office. We want to wrap up your Partnership experience on a high note so don't miss this session as we "go out with a bang"!



# Conference Highlights

## Support Centre and Ideascope

Oxford

Go 1-on-1 with a product insider. You decide the topic and we'll provide the straightforward advice. This is the perfect opportunity to ask questions, get answers, and provide feedback to the experts who know Sage Simply Accounting best. Schedule your 30-minute consultation at the appointment desk in Oxford Room. Walk-ins are welcome and subject to availability.

### Got a feature idea? Tell us about it at the Ideascope Kiosk.

Do you want to make a difference in Sage Simply Accounting? Have you ever wondered how product managers come up with a list of features for a future release? Do you want your feature suggestion to make it to that list? This is the secret of getting your suggestion heard: visit Ideascope, our online feature suggestion website. Using Ideascope, you can tell us features which you or your clients want. Using Ideascope, you can also help our product managers to rank features. The higher a feature is ranked, the more likely it will make it into a future release.

We want you to help us build the best product for you and your clients. Visit Ideascope and tell us what you and your clients want. Make a difference, let your opinion be heard.

**Thursday, October 21:** 11:30 a.m. – 4:30 p.m.  
**Friday, October 22:** 8:30 a.m. – 4:30 p.m.  
**Saturday, October 23:** 9:00 a.m. – 12:00 p.m.

## User Experience (UX) Design Lab

Prince of Wales

This popular conference activity enables you to meet face to face with Sage Simply Accounting usability and design analysts and test drive features being researched for future releases. Help yourself and your clients by sharing your expertise with us. Come by the User Experience (UX) Design Lab to test drive features in the works for Sage Simply Accounting 2011. Drop-in or sign-up for a time that works for you. This is your chance to have a say in the design of Sage Simply Accounting.

**Thursday, October 21:** 9:00 a.m. – 9:45 a.m. and 1:30 p.m. – 4:30 p.m.  
**Friday, October 22:** 9:00 a.m. – 4:30 p.m.  
**Saturday, October 23:** 9:30 a.m. – 11:00 a.m.

## Internet Café and Wireless Access

Regency Foyer

Wireless Internet access is available to attendees throughout all conference areas. In addition, for your convenience we've provided a free Internet Café at Simply Partnership. Computers with high-speed connections are available for use in the Regency Foyer in front of the Balmoral Room. As a courtesy for other attendees, please limit your usage to 20 minutes. To access the wireless Internet, use the following login information:

**Login:** SAGE  
**Password:** simply2010  
(Case sensitive)

## Welcome Reception

Perspectives Level of the Hyatt Regency  
(34th Floor)

Thursday, October 21 | 5:00 p.m. – 7:00 p.m.

Kick off your conference in style at the Welcome Reception. This is the place to connect with old colleagues and make new acquaintances—all in a casual, relaxed environment with amazing views of the skyline. Drinks and fare that spans Vancouver's greatest neighbourhoods will be served.

# Conference Highlights

## Cocktail Reception and Trade Show

Regency Foyer

Friday, October 22 | 5:30 p.m. – 7:00 p.m.

Before the Simply Stampede Theme Party, get the night started right with good drinks, tasty appetizers, and smart folks. It's a great chance to network with the Exhibitors, Sage Simply Accounting team, and your fellow consultants.

## Simply Stampede Theme Party

Regency Ballroom

Friday, October 22 | 7:00 p.m. – Midnight

Round up your fellow partners and head on over to the Simply Stampede! This is your night to network and party with partners while enjoying a hearty dinner, rockin' music, crazy games, casino tables, and more. So get in a western state of mind, pull up a bar stool, and join the good folks at Simply Stampede!

- Get your groove on as the DJ spins your favourites (with some line dancing thrown in)
- Test your endurance in the BULL RIDING ring!
- Get your game on at the casino (Blackjack, Roulette, Texas Hold 'em, Money Wheel)
- Catch the fun with a snapshot in the photo booth
- Try your luck at crazy games (Clown Knockdown, Crazy Driver, Balloon Darts)
- Experience tasty food stations
- And much more!

**Suggested attire:** Think Calgary Stampede—don your finest western wear, including blue jeans, boots, belt buckles, bandanas, and beyond.

**Dinner Menu:** *(Subject to Change)*

### Salads

- Ranch Style Potato Salad with Capers, Red Onions, Olives and Grainy Mustard Mayonnaise
- Mixed Farm Garden Greens with Raspberry Vinaigrette and Balsamic Vinaigrette
- Bronco Buster House Cabbage and Carrot Coleslaw with Chipotle Pepper Vinaigrette
- Caesar Salad
- Bulls Eye Black Bean Salad and Smoked Paprika Vinaigrette

### Entrees

- Pulled BBQ Pork, Served with Mini Brioche Buns
- Double Smoked Cookhouse BBQ Ribs with Honey Garlic and Tomato Glaze
- Fire Roasted Garlic Rubbed Range Raised Chicken Breast
- Whistlin' Hot! Stampede Vegetarian Chili
- Buttered Corn on the Cob
- Herb Roasted Baby Potatoes
- Green Beans

### Desserts

- Country Baked Apple Pie and Ice Cream
- Red Velvet Cake
- Wild Prairie Berry Cheesecake
- Individual Chocolate Mousse Coupes



# Trade Show

## Regency Foyer

Explore the latest technologies at the Simply Partnership trade show. This is your opportunity to test drive new innovations and applications that enhance the capabilities of Sage Simply Accounting. If your clients are facing a unique challenge, you might find the solution you've been looking for at the trade show.

**Wednesday, October 20:** 4:00 p.m. – 8:00 p.m.

**Thursday, October 21:** 10:00 a.m. – 4:00 p.m.

**Friday, October 22:** 7:00 a.m. – 7:00 p.m.

## Sage Solutions Hall

### Balmoral

Stop by the Sage Solutions Hall to discover new products and innovative add-ons that compliment Sage Simply Accounting. Learn about products and services that address the needs of growing businesses.

Sage Abra HRMS

Sage ACT!

Sage Billing Boss and Payment Boss

Sage Construction and Real Estate Solutions

Sage ERP Accpac

Sage FAS Fixed Assets

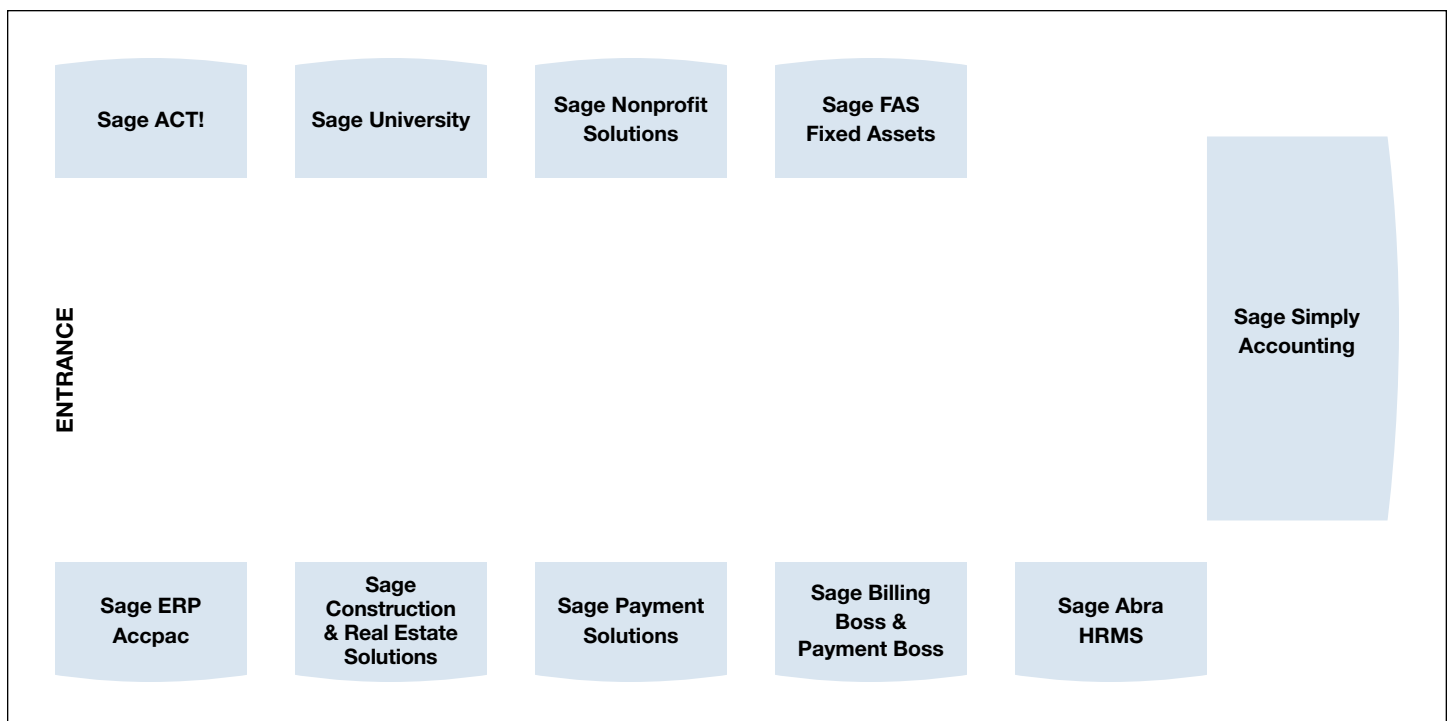
Sage Nonprofit Solutions

Sage Payment Solutions

Sage Simply Accounting

Sage University / Learning Services

### Sage Solutions Floor Plan



## Exhibitor Promotions

Winners for the following prizes will be announced Saturday morning in the It's a Wrap Keynote. You must be present to win, except where noted.

### CCH Canadian Limited

Booth #10  
www.cch.ca

**Prize drawing:** CCH computer trolley bag

### Citrix OnLine

Booth #14  
www.citrixonline.com

**Prize drawing:** iPod Nano – 8GB “touch”

**Note:** Winner will be contacted post conference.

### Davis + Henderson

Booth #11  
www.dhltd.com

**Prize drawing:** Apple iPad

### Genius Solutions

Booth #5  
www.geniuserp.com

**Prize drawing:** Genius Solutions T-shirts to the first 50 visitors

### Logicim

Booth #7  
www.logicimtech.com

**Prize drawing:** Copy of XLGL software, including one year of upgrades and support

### MISys Inc.

Booth #9  
www.misysinc.com

**Prize drawing:** FREE trial copy of MISys to any attendee who visits their booth

### SmartVault Corporation

Booth #4  
www.smartvault.com

**Prize drawing:** Flip video camera

### T2Canada.ca

Booth #8  
www.t2canada.ca

**Prize drawing:** Five lucky attendees will receive a FREE corporate tax preparation package worth \$1,000.



## Exhibitors

We encourage you to visit our exhibitors' booths and view their demos, chat with their representatives, and look for innovative, smart solutions that can help you enhance the capabilities of Sage Simply Accounting.

**Note:** Exhibitors are listed in alphabetical order.

### AccuPOS Point of Sale

Booth #13

[www.accupos.com](http://www.accupos.com)

The first and only Point of Sale system ever to be officially "Endorsed by Sage", AccuPOS is the leading supplier of accounting-integrated retail and food service Point of Sale solutions for successful businesses all over the world. Featuring a unique design that utilizes the inventory, vendor and customer capabilities of Simply Accounting, AccuPOS shortens the implementation times and learning curves associated with competitive systems by leaving business management where it belongs—in accounting. AccuPOS is easy to master, compatible with most POS hardware and completely secure for all forms of face-to-face payment collection.

### Beanstream Internet Commerce Inc.

Booth #6

[www.beanstream.com](http://www.beanstream.com)

Beanstream is an online payment gateway and merchant account provider serving clients in the USA and Canada. The company has been helping online businesses achieve their maximum ecommerce potential since 2000 with various flexible online credit card processing solutions, risk management tools and direct debit / direct payment processing options, including an integrated Direct Deposit solution for Sage Simply Accounting. Beanstream is a subsidiary of LML Payment Systems Corp.

### Citrix Online

Booth #14

[www.citrixonline.com](http://www.citrixonline.com)

Citrix Online provides secure, easy-to-use online solutions that enable people to work from anywhere with anyone: GoToMyPC® for remote access, GoToAssist® for remote support, GoToMeeting® for online meetings, GoToWebinar® for larger Web events, and GoToTraining™ for interactive online training. Visit booth 14 to learn how to leverage these tools to gain competitive advantage.

### CCH Canadian Limited

Booth #10

[www.cch.ca](http://www.cch.ca)

CCH Canadian is one of Canada's largest and most respected business-to-business information providers for professionals, producing leading-edge research materials, tax preparation and financial planning software in both English and French for such industries and professions as tax and tax compliance, law, financial planning, human resources, securities, business, and commerce. CCH has been a trusted research partner for more than 60 years.

### Davis + Henderson

Booth #11

[www.dh ltd.com](http://www.dh ltd.com)

Davis + Henderson has been meeting the needs of the Canadian financial services industry since 1875. We provide innovative programs, technology products, and technology based business services to financial services industry customers who offer deposit, lending, insurance and wealth management products to consumers and businesses. Our products and programs - including personal cheques, cheques for small business, and deposit products - are offered to more than 20 million individual account holders and 2 million small business account holders across Canada.

## Genius Solutions

Booth #5

[www.geniuserp.com](http://www.geniuserp.com)

Genius Solutions is a leading software and solution provider with a comprehensive and feature rich manufacturing management solution. Genius focuses on Make-to-Order and Engineer-to-Order and discrete manufacturers. Genius Manufacturing NG contains modules to assist with the full business cycle of a manufacturing business from Estimating and Product Engineering to Data collection and Costing.

## Institute of Professional Bookkeepers of Canada (IPBC)

Booth #1

[www.IPBC.ca](http://www.IPBC.ca)

"*The Bookkeeper's Advocate*" – the IPBC is dedicated to bookkeepers. We're the first and only association with a fully automated, national standardized exam for the coveted Certified Professional Bookkeeper (CPB) credential. Membership is exploding because we deliver exactly what bookkeepers want: multiple networking opportunities, professional recognition, education discounts, and more.

## Logicim inc.

Booth #7

[www.logicimtech.com](http://www.logicimtech.com)

Since 2004, Logicim inc. has provided high-end solutions in deployment, integration, and training for Sage Simply Accounting. Logicim's unique blend of experienced Simply Accounting Certified Consultant and highly trained software engineer has helped hundred of enterprises across Canada. With tools such as Logicim XLGL, they've brought easy-to-use, powerful, and affordable business intelligence solutions to small and medium businesses.

## MISys Inc.

Booth #9

[www.misysinc.com](http://www.misysinc.com)

MISys SBM brings industrial strength manufacturing to Sage Simply Accounting. MISys offers raw material and WIP inventory control, MRP, multi-level BOMs, Work Orders, Standard, Average and LIFO/FIFO costing, Serial/Lot Tracking, Advanced Purchasing, Production Scheduling, multiple warehouse locations, Shop Floor Control, and Labor Tracking. Automatic purchase orders and work orders are driven from the MRP and Production Schedule.

## SmartVault Corporation

Booth #4

[www.smartvault.com](http://www.smartvault.com)

SmartVault is the easiest way for businesses and accounting professionals to store, access, and share documents. From built-in wizards that interface with your scanner to seamless integration with popular business and finance applications—you can immediately transition to a highly efficient paperless environment and streamline how you work and communicate with your clients, employees, and business service providers.

With SmartVault, you can:

- Go paperless with ease
- Easily share files and collaborate securely in the cloud
- Store and find files in familiar applications

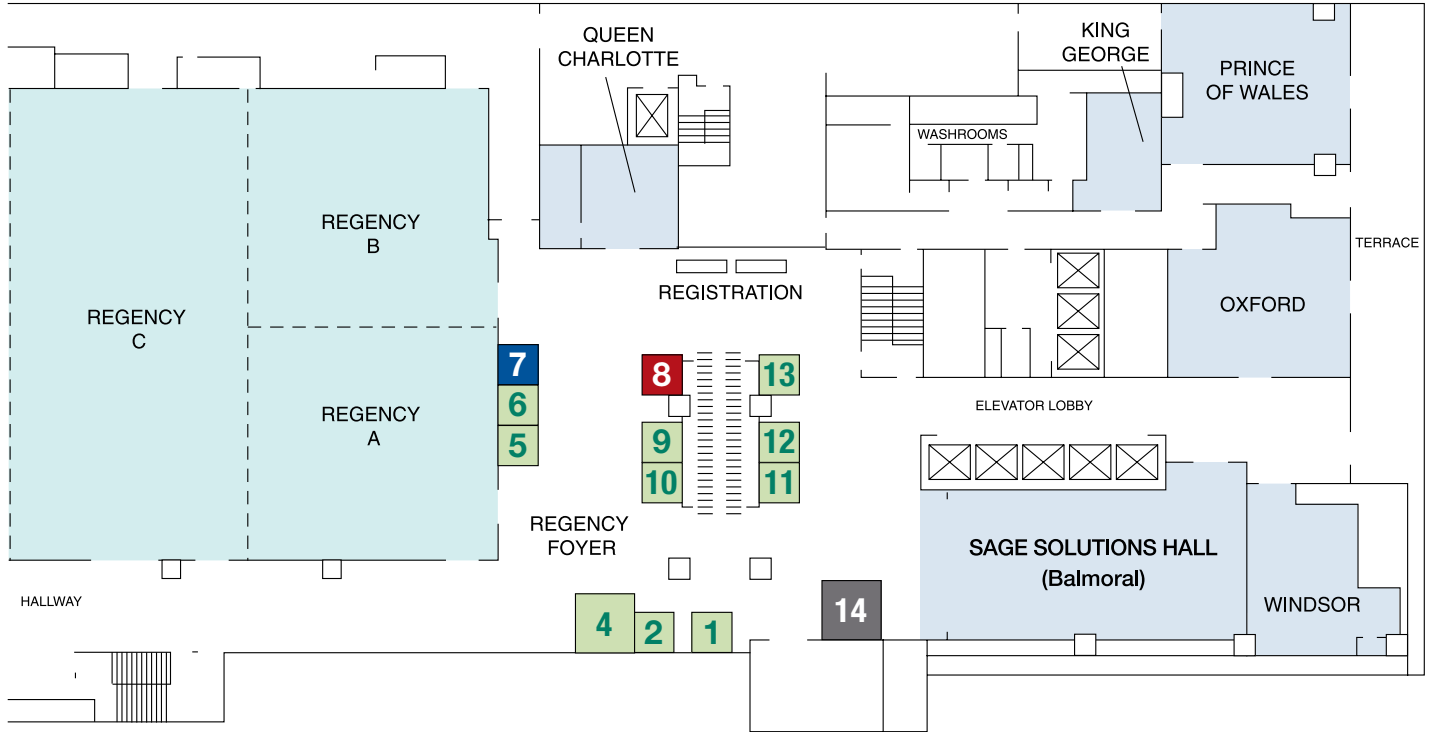
## T2Canada.ca

Booth #8

[www.t2canada.ca](http://www.t2canada.ca)

T2Canada.ca is the virtual office of MacFarlane & Company Chartered Accountant. Through this portal, we provide corporate tax preparation services to our professional bookkeeper partners. More specifically, the website has been designed to be of service to the bookkeepers of small Canadian business corporations who use Sage Simply Accounting as their accounting software.

## Exhibitor Floor Plan



## Premier Sponsors

- 14 Citrix OnLine
- 7 Logicim
- 8 T2Canada.ca

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# Session Schedule

## Thursday, October 21

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Business Development	Day 1: Additional Sessions	
7:00 a.m. – 8:15 a.m.	First Timer Welcome Session and Breakfast					
7:30 a.m. – 8:15 a.m.	Buffet Breakfast					
8:15 a.m. – 8:30 a.m.	Welcome with Jennifer Warawa and Darren Root (co-author of the E-Myth Accountants Edition)					
8:30 a.m. – 9:00 a.m.	General Session: Sage Simply Accounting – A Look Back and a Peek Forward with Jamie Sutherland					
9:00 a.m. – 9:45 a.m.	General Session: What's New and Product Management Update					
9:45 a.m. – 10:00 a.m.	Coffee Break and Move to next session					
10:00 a.m. – 11:30 a.m.	<b>SAS01: Introducing Simply Accounting Intelligence</b> Christina Wong and Charles Teversham, Sage <b>Georgia A</b>	<b>SAS11: Understanding the Simply Accounting Database Structure for Non-Techies</b> Carla Caldwell, Sage <b>Regency F</b>	<b>CFL01: Sage ACT! 2011</b> Sage ACT! Product Management <b>Plaza B</b>	<b>TPP07: Canada Revenue Agency: Application of the GST/HST to Charities</b> Bill Burdon, Canada Revenue Agency <b>Plaza C</b>	<b>BDV01: Creating Strategy in a Small Business</b> Ed Kless and Rob Johnson, Sage <b>Georgia B</b>	<b>SAS20: Billing Boss, Payment Boss, and Simply Accounting Integration</b> Chuck LeDuc and Peter Liao, Sage <b>Plaza A</b>
11:30 a.m. – 1:00 p.m.	Awards Luncheon					
1:00 p.m. – 2:00 p.m.	<b>SAS02: Payroll 101</b> Sue du Puy, Sage <b>Georgia A</b>	<b>SAS12: Converting a Client Database to Simply Accounting</b> Hongfei Qu and Beatriz Ng, Sage <b>Regency F</b>	<b>CFL02: Sage ERP Accpac: ERP for Global Enterprise</b> Randy Bacchus, Sage <b>Plaza A</b>	<b>TPP02: CCH Canadian Ltd</b> Gerry Barker, CCH <b>Plaza C</b>	<b>BDV02: Initiating Projects in a Small Business or Small Team</b> Ed Kless and Rob Johnson, Sage <b>Georgia B</b>	<b>CFL09: Simply Accounting Business Partner Program Roundtable</b> Jennifer Warawa and Partner Programs Team, Sage <b>Plaza B</b>
2:00 p.m. – 2:15 p.m.	Move to next session					
2:15 p.m. – 3:15 p.m.	<b>SAS03: The Credit Card Connection</b> Moira Milligan, Simply Accounting Business Partner <b>Georgia A</b>	<b>SAS13: Departmental Accounting</b> Leyla Szabo-Kustan, Simply Accounting Business Partner <b>Regency F</b>	<b>CFL03: Sage FAS Fixed Assets</b> Alistair Ellis and FAS Product Management, Sage <b>Plaza B</b>	<b>TPP08: Electronic Payments: Payroll Direct Deposit, Vendor Payments and Customer Collections</b> Paul Ellis, Sage and Jane Waite, Beansteam Internet Commerce <b>Georgia B</b>	<b>BDV08: Supporting Clients Remotely Using Citrix GoToAssist Express</b> Nicole Hawthorne, Citrix <b>Plaza C</b>	<b>SAS21: Grow Your Business With Simply Accounting Intelligence</b> Christina Wong and Charles Teversham, Sage <b>Plaza A</b>
3:15 p.m. – 3:45 p.m.	Coffee Break, Trade Show, and Move to Keynote					
3:45 p.m. – 4:45 p.m.	Keynote Featuring Don Bell, CoFounder of WestJet					
5:00 p.m. – 7:00 p.m.	Welcome Reception					

# Session Schedule

## Friday, October 22

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Business Development	Gold and Platinum	
7:00 a.m. – 8:00 a.m.	Breakfast and Trade Show					
8:00 a.m. – 9:00 a.m.	<p><b>SAS04: Advancing Your Partner Certification Level</b> Amber Kenyon, Sage <b>Georgia A</b></p>	<p><b>SAS14: Create an Excel Company Dashboard in Under 30 Minutes</b> Christina Wong and Les Allen, Sage <b>Regency F</b></p>	<p><b>CFL04: PCI Overview: Understanding the Requirements of Payment Card Industry Security Certification</b> Paul Ellis, Sage and Penny Corrigan, Sage Payment Solutions <b>Plaza A</b></p>	<p><b>TPP04: Genius Manufacturing</b> Peter Spitzer, Genius Solutions <b>Plaza B</b></p>	<p><b>BDV04: Expanding Your Business With Simply Accounting Training</b> The Sage Simply Accounting Training Team <b>Plaza C</b></p>	<p><b>GAP01: Unleash the Power of the Simply Accounting Software Development Kit (SDK)</b> Eric Martin, Sage <b>Georgia B</b></p>
9:00 a.m. – 9:15 a.m.	Move to next session					
9:15 a.m. – 10:15 a.m.	<p><b>SAS05: Simply Accounting: The Last Five Years</b> Doris Woodman-McMillan, Simply Accounting Business Partner <b>Georgia A</b></p>	<p><b>SAS15: Resolving Account Reconciliation Issues for your Clients</b> Sue du Puy, Sage <b>Regency F</b></p>	<p><b>CFL05: Sage CRM: Taking Customer Relationships Beyond the Accounting Department</b> Randy Bacchus, Sage <b>Plaza A</b></p>	<p><b>TPP05: AccuPOS Point of Sale</b> Joe Pergola, AccuPOS <b>Plaza B</b></p>	<p><b>BDV05: Setting Up Shop in The Cloud</b> Eric Pulaski, Founder and CEO, SmartVault Corp. <b>Plaza C</b></p>	<p><b>GAP02: Gold &amp; Platinum Roundtable</b> Jennifer Warawa and Partner Programs Team, Sage <b>Georgia B</b></p>
10:15 a.m. – 10:30 a.m.	Coffee Break, Trade Show, and Move to next session					
10:30 a.m. – 12:30 p.m.	<p><b>SAS06: Inventory: From Basic to Advanced</b> Joel Reisler, Sage <b>Georgia A</b></p>	<p><b>SAS16: Setting Up and Customizing a Simply Accounting Company File</b> Alistair Ellis, Sage <b>Regency F</b></p>	<p><b>CFL06: Tips and Tools in Navigating the Charitable Sector</b> Sage Nonprofit Solutions <b>Plaza A</b></p>	<p><b>TPP06: Understanding Microsoft Excel Pivot Tables</b> Carla Caldwell, Sage <b>Plaza B</b></p>	<p><b>BDV06: Performance Matters – Take Your Employees From Good to Great!</b> Lili Cordeiro, Sage <b>Plaza C</b></p>	<p><b>GAP03: Workshop: Delivering an Extraordinary Customer Experience</b> Doug Meyer, Chief Customer Officer and Connie Certusi, SVP and GM, Small Business Accounting Solutions, Sage North America <b>Georgia B</b></p>
12:30 p.m. – 1:30 p.m.	Lunch and Trade Show					
1:30 p.m. – 3:00 p.m.	<p><b>SAS07: Project &amp; Job Costing – Improved!</b> Alistair Ellis, Sage <b>Georgia A</b></p>	<p><b>SAS17: Top Tech Support Triggers and How to Solve Them</b> Naz Gigaseri, Sage <b>Regency F</b></p>	<p><b>CFL07: Finding the Right Solution for Your Construction Client</b> Jeff Adams, Sage Construction and Real Estate Solutions <b>Plaza A</b></p>	<p><b>TPP01: MISys Manufacturing Software for Sage Simply Accounting</b> MISys Inc. <b>Plaza B</b></p>	<p><b>BDV07: Your Raise Becomes Effective When You Do: The Will, Skill and Drill of Creating Success</b> Rob Johnson, Sage <b>Plaza C</b></p>	<p><b>GAP04: Industry-Specific Best Practices for and by Gold and Platinum Consultants</b> Sage Learning Services Team <b>Georgia B</b></p>

# Session Schedule

## Friday, October 22 (cont.)

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Business Development	Gold and Platinum	
3:00 p.m. – 3:15 p.m.	Coffee Break, Trade Show, and Move to next session					
3:15 p.m. – 4:45 p.m.	<b>SAS08: Foreign Currency from A-Z</b> Carla Caldwell, Sage <b>Georgia A</b>	<b>SAS18: Product Feedback Roundtable</b> The Sage Simply Accounting Product Management Team <b>Regency F</b>	<b>CFL08: Training Program Roundtable</b> Sage Learning Services Team <b>Plaza A</b>	<b>TPP03: Logicim XLGL – The Evolution of Intelligence</b> Pierre Alain Carrier, Logicim <b>Plaza B</b>	<b>GAP03B: Workshop: Delivering an Extraordinary Customer Experience</b> Doug Meyer, Chief Customer Officer and Connie Certusi, SVP and GM, Small Business Accounting Solutions, Sage North America <b>Georgia B</b>	<b>GAP05: Creating a Value Proposition</b> Rob Johnson, Sage <b>Plaza C</b>
5:30 p.m. – 7:00 p.m.	Cocktail Reception and Trade Show					
7:00 p.m. – Midnight	Simply Stampede Theme Party					

## Saturday, October 23

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Popular Repeat Sessions		
9:00 a.m. – 10:00 a.m.	Closing Brunch					
10:00 a.m. – 11:00 a.m.	<b>SAS09: Time and Billing</b> Sue du Puy, Sage <b>Georgia A</b>	<b>SAS19: Payroll Year End: Filing and Reporting in Simply Accounting</b> Tracy Hartwell, Sage <b>Plaza A</b>	<b>SAS10: Product Feedback Roundtable</b> The Sage Simply Accounting Product Management Team <b>Regency F</b>	<b>TPP09: The Digital Office of Today and Tomorrow</b> Alan Salmon, K2 Enterprises <b>Georgia B</b>	<b>TPP06B: Understanding Microsoft Excel Pivot Tables</b> Carla Caldwell, Sage <b>Regency E</b>	<b>SAS14B: Create an Excel Company Dashboard in Under 30 Minutes</b> Christina Wong and Les Allen, Sage <b>Stanley</b>
11:00 a.m. – 11:15 a.m.	Move to Keynote					
11:15 a.m. – 12:15 p.m.	It's a Wrap Keynote					



# Conference Sessions

**Note:** These sessions are listed numerically and by learning track.

## **BDV01: Creating Strategy in a Small Business**

**Georgia B**

Presenters: Ed Kless and Rob Johnson, Sage

This session is dedicated to the possibility that even small organizations can create and execute meaningful strategic plans. Creating a well-defined strategy is hard work and not for everyone, as it requires us to begin to say no to stuff we usually say yes to. Presenters Rob Johnson and Ed Kless invite you to open a dialogue about how to create a winning strategy for your small organization.

**Day:** Thursday, October 21, 2010

**Time:** 10:00 a.m. – 11:30 a.m.

**Learning Track:** Business Development

## **BDV02: Initiating Projects in a Small Business or Small Team**

**Georgia B**

Presenter: Ed Kless, Sage

This session is dedicated to the possibility that in small organizations or teams, projects are rarely initiated properly and therefore achieve less than optimal results. Initiating internal projects properly is hard work and not for everyone, as it requires us to think differently than we have in the past. Presenter Ed Kless invites you to open a dialogue about how best to initiate new projects in your small organization.

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Business Development

## **BDV04: Expanding Your Business With Simply Accounting Training**

**Plaza C**

Presenter: The Sage Simply Accounting Training Team

You know Simply Accounting inside and out, and you love teaching people about the product, but you're not sure how to get this side of your business started. Join this session to learn how to grow your business as a trainer. We'll discuss the skills you need to develop, and how Sage can come alongside you with our Certified Trainer Program and curriculum to help you in these areas. Find out how to select the right venue and whether to offer hands-on or lecture, and leave with a clear plan on how you can expand into this exciting new arena.

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Business Development

## **BDV05: Setting Up Shop in The Cloud: Tips and Truths to Help You on the Stairway to Heaven**

**Plaza C**

Presenter: Eric Pulaski, Founder and CEO, SmartVault Corp.

Sure, The Cloud seems okay for email and simple file collaboration, but would you really use it for storing and sharing your most sensitive business documents and financial information? Concerns around data security and privacy are common when considering an online document storage solution for your firm. Gain insights into the efficiencies online collaboration can bring to your firm, plus best practices for storing and sharing data inside the firm and with clients. Also learn differences between local, hosted, and online (cloud) applications—and advantages and efficiencies of offsite document storage.

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Business Development

## **BDV06: Performance Matters – Take Your Employees From Good to Great!**

**Plaza C**

Presenter: Lili Cordeiro, Sage

In this interactive session we will focus on what it takes to develop high-performing employees in your organization. Attendees will learn how effective performance management can help attract, develop, and retain talent. Attendees will also learn a simple framework for effective performance management, the five crucial conversations that every business leader should have with their employees, how to provide effective feedback and coach for success, how to apply positive techniques to resolve challenging performance and attitudes, and easy ways to reward and recognize great performance. Every people manager will benefit from taking this session with key takeaways that can be immediately applied in your own business.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.

**Learning Track:** Business Development

## **BDV07: Your Raise Becomes Effective When You Do: The Will, Skill, and Drill of Creating Success**

**Plaza C**

Presenter: Rob Johnson, Sage

Too many of us waste our lives blaming others for our failures. What a shame! The sooner we take responsibility for our own success, the quicker we will change the arc of our potential, and achieve more than we ever thought possible. In other words, "Your raise becomes effective when you do." This inspiring and motivational session led by Rob Johnson focuses on the three elements necessary to succeed: the will, skill, and drill of creating success. The will is the required mental preparedness: the drive to persevere and overcome fear, procrastination, constant adversity, and rejection. The skill is foundation of knowledge. And, the drill is the process of setting goals, creating a success plan, and the execution of daily activities that create meaningful sustained superior results. Change the arc of your potential. This session is a great first step!

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Business Development

# Conference Sessions

## **BDV08: Supporting Clients Remotely Using Citrix GoToAssist Express**

Plaza C

Presenter: Nicole Hawthorne, Citrix

Has your Simply Accounting consulting business changed with the many advances in technology, or are you still consulting “the old way”? This workshop will show you how to utilize technology to perform consulting services that would normally require you to be on-site at your client’s office, but can now be performed right from your own desk using GoToAssist Express by Citrix. Technology can provide you with the tools to expand your client base and increase your rates. This workshop will provide you with background information on how it works and how you can get started.

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Business Development

## **CFL01: Sage ACT! 2011**

Plaza B

Presenters: Sage ACT! Product Management

Sage ACT! 2011, with a release date just prior to Simply Partnership 2010, is full of powerful new enhancements. Be sure to attend this session to get the information you need to successfully use, recommend, support, and even sell Sage ACT! 2011, Sage’s customer relationship manager for small businesses. In this session we will give a general overview of the Sage ACT! product and explore the how you can put the exciting new enhancements to work for your clients.

**Day:** Thursday, October 21, 2010

**Time:** 10:00a.m. – 11:30 a.m.

**Learning Track:** Customers For Life

## **CFL02: Sage ERP Accpac: ERP for Global Enterprise**

Plaza A

Presenter: Randy Bacchus, Sage

Sage ERP Accpac, an international mid-market leader and industry-awardwinning solution with Canadian roots, is one of only two products in the vast Sage portfolio with the distinction of being a global branded product. Its strength in daily processing for operations and financial management, coupled with its unique configuration and implementation options, allow for Sage ERP Accpac to provide solid core functionality that meets the needs of a diverse range of organization types and industries. In this session, you will learn about the product’s core modules and functions, as well as its appeal as a global solution with its multicurrency, multi-location, and multi-company consolidation features. You will also be introduced to the Extended Enterprise suite of applications, such as the award-winning SageCRM, integrated HR and fixed asset management solutions, and business intelligence and reporting tools. Attend this session to learn more about Sage ERP Accpac and how it can provide a single solution for growing and global businesses.

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Customers For Life

## **CFL03: Sage FAS Fixed Assets**

Plaza B

Presenters: Alistair Ellis and FAS Product Management, Sage

Are your clients tracking fixed assets using spreadsheets that are time consuming and prone to data entry errors? In this informative session, you will discover how Sage FAS can be used to efficiently manage and report on fixed assets. You will also see how it integrates with Sage Simply Accounting, eliminating the need to re-key information and enabling you to maintain reliable, relevant, and useful data. Your clients will be thrilled about this opportunity to properly manage their fixed assets, uncover potential tax savings, and eliminate insurance premiums being paid for assets that are no longer owned or in use!

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Customers For Life

## **CFL04: PCI Overview: Understanding the Requirements of Payment Card Industry Security Certification**

Plaza A

Presenters: Paul Ellis, Sage, and Penny Corrigan, Sage Payment Solutions

Payment Card Industry (PCI) Compliance is a complex and multi-faceted issue facing merchants, software companies, and processors. The major credit card companies-Visa, MasterCard, and American Express-created regulations called Payment Card Industry Data Security Standards (PCI - DSS) to help prevent theft of sensitive cardholder data. Recent mandates by the PCI Security Standards Council now require all credit card processors to ensure their merchant businesses are compliant, which includes the use of compliant payment applications. In this session, you will learn all you need to know about PCI compliance to help secure your business and your clients’ business from credit card fraud.

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Customers For Life

# Conference Sessions

## **CFL05: SageCRM: Taking Customer Relationships Beyond the Accounting Department**

Plaza A

Presenter: Randy Bacchus, Sage

SageCRM is an award-winning, web-based customer relationship management solution that brings together information across departments to make companies truly customer-focused. As part of the Sage ERP Accpac Extended Enterprise Suite, SageCRM provides complete control of the customer lifecycle—from making initial contact with a prospect, to providing and tracking quotes, to the first sale and on to order fulfillment, collections management, and after-sales care. Managing customer relations and identifying opportunities become easier and net greater results. In this session you will see how an integrating the SageCRM solution with Sage ERP Accpac allows businesses to build stronger connections with customers through its powerful sales force automation, marketing campaign, and customer care functions. You will also learn about SageCRM customization features and workflow capabilities. Join us and discover how SageCRM is solving the customer relationship management needs of organizations worldwide in this informative session.

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Customers For Life

## **CFL06: Tips and Tools in Navigating the Charitable Sector**

Plaza A

Presented by Sage Nonprofit Solutions

Now, more than ever, not-for-profits and their financial advisors face increasing scrutiny and challenges. Understanding the charitable environment and having the best tools available will go a long way in leveraging your success. This session will be an overview of the nonprofit vertical, focusing on trends in the sector, challenges and pains, strategies for success, tools and solutions, roundtable discussion.

Sage Nonprofit Solutions has been serving charitable and governmental organizations for more than 30 years. Sage currently helps more than 32,000 unique not-for-profit organizations in the U.S. and Canada increase efficiency and more easily manage their operations through the use of technology. From fund accounting, donor /fundraising management, and fixed asset management, to online donation processing, human resources (HR), payroll, and health care, Sage offers a software product or service to meet the organization's needs of demonstrating transparency, ensuring compliance, reducing costs, deepening constituent relationships and improving online giving.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.

**Learning Track:** Customers For Life

## **CFL07: Finding the Right Solution for Your Construction Client**

Plaza A

Presenters: Jeff Adams, Sage Construction and Real Estate Solutions

Construction companies and their financial advisors face many challenges today as they work to survive and thrive through shifting market conditions. Having detailed job costing and visibility into business operations through reporting are vital in ensuring profitability of construction projects and managing cashflow. Managing a construction company is especially challenging when you need to understand special tax regulations, comply with state and federal regulations, navigate complex human resource management and payroll issues, and make difficult financial and accounting decisions.

This session will focus on knowing when a construction company should upgrade to a construction-specific business management solution with a solid accounting core and construction-specific workflows in areas such as job costing, purchasing, project management, and payroll. Armed with the right information at the right time, a construction company can operate more efficiently and profitably. No matter where your business fits into the building lifecycle—new construction, service and maintenance, or property management—Sage Construction and Real Estate offers a complete range of software solutions so you can find the best one to meet your unique needs. With more than 20,000 customers, Sage construction software and real estate solutions are backed by more than 30 years of experience and award-winning support.

About Jeff Adams:

Jeff is Director of Product Management at Sage. He has nearly 15 years of experience developing business management solutions for the construction industry.

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Customers For Life

## **CFL08: Training Program Roundtable**

Plaza A

Facilitators: Sage Learning Services Team

We heard on the Simply Accounting Listening Tour earlier this year that we need to offer more training and it needs to be more visible to you and your clients, so let's put our heads together and discuss how best to meet this need. What's working, what's not, and how can we improve our online and classroom training program for our customers and partners? Come collaborate with the Sage Learning Services team to see what is on our roadmap and help us plan for the future.

**Day:** Friday, October 22, 2010

**Time:** 3:15 p.m. – 4:45 p.m.

**Learning Track:** Customers For Life

# Conference Sessions

## **CFL09: Simply Accounting Business Partner Program Roundtable**

Plaza B

Facilitators: Jennifer Warawa and the Partner Programs Team, Sage

This roundtable will give partners and Sage Accountants Network Members the opportunity to provide feedback and make suggestions regarding the Simply Accounting Business Partner/Sage Accountants Network Program.

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Customers For Life

## **GAP01: Unleash the Power of the Simply Accounting Software Development Kit (SDK)**

Georgia B

Presenter: Eric Martin, Sage

In this session you'll learn about the new .NET Sage Simply Accounting Software Development Kit (SDK). We'll start with a brief overview of the new SDK and how it is different than previous versions—and we'll discuss the trade offs between them. Afterwards, you will be prepared to work effectively with the new .NET SDK code when creating custom third-party applications. Additionally, you'll learn how to sign up for the Sage Simply Accounting Development Program and download the new .NET SDK. Note: This is a technical session; experience or knowledge of programming is strongly recommended.

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Gold and Platinum

## **GAP02: Gold and Platinum Roundtable**

Georgia B

Facilitators: Jennifer Warawa and the Partner Programs Team, Sage

As a Gold or Platinum partner, we recognize that you have invested considerable time and resources into taking all the Simply Accounting training required to get you to this level, and we sincerely appreciate your commitment to your ongoing development. During this workshop, we will be listening to your ideas on how we can improve the Gold and Platinum certification programs and continue to offer training that is challenging and rewarding for all partners.

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Gold and Platinum

## **GAP03 and GAP03B: Workshop: Delivering an Extraordinary Customer Experience**

Georgia B

Facilitators: Doug Meyer, Chief Customer Officer and Connie Certusi, SVP and GM, Small Business Accounting Solutions, Sage North America

At Sage, we are creating a unified, customer-driven culture. To that end, we are requiring all 4,000 of our North American employees to complete a Customer Experience workshop. This workshop has been so well received that we have created a similar session specifically designed for business partners. In this interactive, immersive session, you'll hear what Sage is doing to transform our business culture into one that is customer drive, and we'll discuss how we can collectively improve the customer experience we provide to our mutual customers.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.  
and 3:15 p.m. – 4:45 p.m.

**Learning Track:** Gold and Platinum

## **GAP04: Industry-Specific Best Practices for and by Gold and Platinum Consultants**

Georgia B

Facilitator: Sage Learning Services Team

Have you recently acquired a new client in construction, manufacturing, or nonprofit? Come collaborate and learn from your Gold and Platinum CC colleagues on how they have tackled these same types of clients. Draw on each other's experience and learn their best practices to make your engagement a success. We'll provide a few talking points to guide the conversation, and then get out of the way!

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Gold and Platinum

## **GAP05: Creating a Value Proposition**

Plaza C

Presenter: Rob Johnson, Sage

Every business creates value for their customer. Your value proposition is the value your customers derive from their relationship with your firm. Highly successful companies understand how to create and deliver value propositions their customers want and need. This session will discuss how to develop and articulate your value proposition.

**Day:** Friday, October 22, 2010

**Time:** 3:15 p.m. – 4:45 p.m.

**Learning Track:** Gold and Platinum

# Conference Sessions

## SAS01: Introducing Simply Accounting Intelligence

Georgia A

Presenters: Christina Wong and Charles Teversham, Sage

Explore the benefits of reporting and beyond with this Microsoft Excel-based intelligence tool. Witness a live demonstration of the reporting, dashboarding, and customization benefits available to you with Simply Accounting Intelligence. See for yourself how to take back your time while providing your clients with insightful, in-depth analysis “straight out of the box” or by making customizations to take reporting to the next level.

**Day:** Thursday, October 21, 2010

**Time:** 10:00 a.m. – 11:30 a.m.

**Learning Track:** Simply Accounting Product

## SAS02: Payroll 101

Georgia A

Presenter: Sue du Puy, Sage

This session covers all the fundamentals of the payroll module, including incomes, benefits, entitlements, employer expenses, remittances, and linked accounts. Attendees will also learn how to get payroll-related expenses (EI, CPP, WCB, etc.) for different types of employees properly assigned to GL accounts or departments. We will explore the ROE Web feature in Simply Accounting and how our direct deposit service works. If you haven't had a lot of experience with payroll in Simply Accounting or aren't sure if you are utilizing all the features of the payroll module, this session is for you!

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Simply Accounting Product

## SAS03: The Credit Card Connection

Georgia A

Presenter: Moira Milligan, Simply Accounting Business Partner

In this session, we will take an in-depth look at the credit card feature in Simply Accounting for both the payables and receivables modules. Attendees will learn how the program is designed to be used for these functions, how you can accept and process credit cards right from within Simply Accounting, and how to streamline setups for different client scenarios.

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Simply Accounting Product

## SAS04: Advancing Your Partner Certification Level

Georgia A

Presenter: Amber Kenyon, Sage

In this session we will do a deeper dive into the new Simply Accounting partner tiers. We will also be covering the differences between the four tiers (Premier Advisor, Bronze Certified Consultant, Gold Certified Consultant, Platinum Certified Consultant), what is required to become a Gold and Platinum Certified Consultant, and the path to get there. We will also be providing guidance on successfully writing the Simply Accounting Certified Consultant exam.

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Simply Accounting Product

## SAS05: Simply Accounting: The Last Five Years

Georgia A

Presenter: Doris Woodman-McMillian, Simply Accounting Business Partner

Over the years, Simply Accounting has introduced many new, exciting features and enhancements. With hectic schedules, you may not have time to read the “What's New” document every year; and for this challenge, we have a solution! In this session, you will learn about many of the product changes that have been implemented over the last five years. Maybe you'll discover a feature that will encourage a client to upgrade or maybe you'll be reminded of a feature that you haven't thought about in awhile, but you'll use in the future. Come on out and have fun with this session as we reminisce about the last five years of Simply Accounting!

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Simply Accounting Product

## SAS06: Inventory: From Basic to Advanced

Georgia A

Presenter: Joel Reisler, Sage

The session is for individuals who do not have much experience with the inventory module in Simply Accounting as we will be covering everything from setup to adjustments. Attendees will learn how to set up linked accounts, inventory items in more than one inventory asset account, add pricing to different customers, and do basic sales and purchases of inventory items. How the FIFO and average costs of inventory differ and how to convert from average costing to FIFO will also be demonstrated. Attendees will find out how to use the item assembly screen to create a “new” item in their inventory that is made up of several single components—and they will also learn how to write off inventory at month end and year end, using the adjustment screen. This session is a deep dive into inventory and is a “must attend” for those wanting to understand inventory from start to finish.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.

**Learning Track:** Simply Accounting Product

# Conference Sessions

## SAS07: Project & Job Costing—Improved!

Georgia A

Presenter: Alistair Ellis, Sage

In this session, attendees will learn the benefits of using the Project module to gain greater insight and manageability around short term and long term projects. This session will cover how to track revenue and expenses using the project module, how to create project budgets, and will also highlight some of the improvements made to this module in Simply Accounting 2011, including budgeting across multiple fiscal years and allocating to a project in the sales order to prevent dataentry errors at time of billing. The Project module is used for a variety of reasons by a wide range of industries, from job costing in construction to event management and more! Join this session to learn how you can put the Project module to work for you and your clients using the recently updated functionality.

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Simply Accounting Product

## SAS08: Foreign Currency From A-Z

Georgia A

Presenter: Carla Caldwell, Sage

This session is designed for partners who would like to learn how to set up and use foreign currency as well as assign and adjust exchange rates. Attendees will learn how to setup foreign vendors and customers and process transactions using foreign currencies, and will also learn about the reporting tools needed to track realized and unrealized exchange gains and losses. There are also some key troubleshooting lessons that are helpful to know when using foreign currency and these will be shared with attendees.

**Day:** Friday, October 22, 2010

**Time:** 3:15 p.m. – 4:45 p.m.

**Learning Track:** Simply Accounting Product

## SAS09: Time and Billing

Georgia A

Presenter: Sue du Puy, Sage

This session demonstrates the complete process of implementing and using Time Slips in Simply Accounting. Attendees will learn how to analyze a business' needs, the Time Slip setup process, and experience demonstrations of Time Slip entries. Attendees will also learn how to pull the Time Slip hours into payroll cheques and customers billings. We will also demonstrate a creative way for keeping track of billable expenses like photocopies and travel charges. This session is packed full of applied knowledge and information for beginners to advanced users. No question goes unanswered!

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Simply Accounting Product

## SAS10: Product Feedback Roundtable

Regency F

Facilitators: The Sage Simply Accounting Product Management Team

This is your opportunity to discuss, prioritize, and recommend solutions to our clients' business requirements. Attendees will not only have the opportunity to express a few of their clients' most important business needs, but can discover what requirements other partners are trying to resolve. As a group we will prioritize these issues and come up with possible resolutions. As a takeaway, the product management group will come away with a set of requirements to look into addressing in upcoming releases of Simply Accounting.

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Simply Accounting Product

## SAS11: Understanding the Simply Accounting Database Structure for Non-Techies

Regency F

Presenter: Carla Caldwell, Sage

Do you need to find data in the Simply Accounting database but don't know where to look? In this session you will not only learn how to locate data in the Simply Accounting database, but apply this to writing reports using Crystal® or Simply Accounting Intelligence. Designed for non-technical consultants, we'll help you see how you can finally customize reports for your clients.

**Day:** Thursday, October 21, 2010

**Time:** 10:00a.m. – 11:30 a.m.

**Learning Track:** Simply Accounting Product

## SAS12: Converting a Client Database to Simply Accounting

Regency F

Presenters: Hongfei Qu and Beatriz Ng, Sage

Learn the benefits, opportunities, and discounts available to you as consultants when looking to convert a client's database to Simply Accounting. During this session we will review how to prepare another database (e.g., QuickBooks) for conversion to Simply Accounting and demonstrate database conversion using both a conversion utility and the export/import method.

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Simply Accounting Product

# Conference Sessions

## SAS13: Departmental Accounting

Regency F

Presenter: Leyla Szabo-Kustan, Simply Accounting Business Partner

The departmental accounting function in Simply Accounting has many different applications in which it can be used. Examples of how departmental accounting can be applied include providing accounting information on actual departments, multiple locations, sales areas, or to track different operating entities within one corporation. Regardless of how you use departmental accounting, knowing its functionality will assist you and your clients. During this session, attendees will learn how to set up departmental accounting, budget for the various departments, and access related reports. Other creative applications of departmental accounting will also be reviewed and best practices will be shared.

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Simply Accounting Product

## SAS14 and SAS14B: Create an Excel Company Dashboard in Under 30 Minutes

Regency F (Friday)  
Stanley (Saturday)

Presenters: Christina Wong and Charles Teversham, Sage

In this one-hour session, learn how to create any report or dashboard necessary with Simply Accounting Intelligence powered by Excel. See an impressive, custom dashboard created in under 30 minutes. If you've ever wished for a project/job site income statement, or spent your time exporting to excel and then "mishmashing" data from multiple locations, this is the session for you!

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Simply Accounting Product

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Simply Accounting Product

## SAS15: Resolving Account Reconciliation Issues for Your Clients

Regency F

Presenter: Sue du Puy, Sage

Knowing the Account Reconciliation inside and out in Simply Accounting will help you gain a competitive edge with your clients. Join this in-depth training on Account Reconciliations in Simply Accounting that will equip consultants with the tools and knowledge to problem-solve on issues encountered with businesses and users. Demonstrations will be shown on setting up reconciliations, assessing the starting balances and information, reconciliation flow and processes, and dealing with un-resolved balances and discrepancies. Also see a demonstration on the steps to download and import online statements directly into the Account Reconciliation.

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Simply Accounting Product

## SAS16: Setting Up and Customizing a Simply Accounting Company File

Regency F

Presenter: Alistair Ellis, Sage

We have heard from many partners that you want to know all the ways you can customize Simply Accounting for a client when you get them up and running. During this session, we will show you how to set up and tweak a chart of accounts in Microsoft Excel and import it into Simply Accounting, change user preferences, set up taxes and tax codes, link control accounts, define user security, customize an invoice, discuss the role of the daily business manager and more. This session is a must attend if you're looking to provide your new Simply Accounting clients with maximum value and a great user experience.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.

**Learning Track:** Simply Accounting Product

## SAS17: Top Tech Support Triggers and How to Solve Them

Regency F

Presenter: Naz Gigaseri, Sage

Partners always want to know, "What are the top reasons people call into tech support, and what are the solutions?" With this knowledge, they can anticipate how to better support their clients. This session gives attendees the opportunity to find out the inside scoop with Naz Gigaseri, one of our top customer support specialists. Not only will she share the top ten tech support tips, but she will also share with you some other great tips and tricks that will help you better serve your clients and maximize your efficiency in the software. Every year, this is a very popular session and this year we extended it so Naz can dive deeper into some of the issues.

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Simply Accounting Product

# Conference Sessions

## SAS18: Product Feedback Roundtable

Regency F

Facilitators: The Sage Simply Accounting Product Management Team

This is your opportunity to discuss, prioritize, and recommend solutions to our clients' business requirements. Attendees will not only have the opportunity to express a few of their clients' most important business needs, but can discover what requirements other partners are trying to resolve. As a group we will prioritize these issues and come up with possible resolutions. As a takeaway the product management group will come away with a set of requirements to look into addressing in upcoming releases of Simply Accounting.

**Day:** Friday, October 22, 2010

**Time:** 3:15 p.m. – 4:45 p.m.

**Learning Track:** Simply Accounting Product

## SAS19: Payroll Year End Filing and Reporting in Simply Accounting

Plaza A

Presenter: Tracy Hartwell, Sage

In this session, we will do a full review of T4 printing, filing (including electronic filing), and PIER reports (why they happen and how to avoid them). We will also be explaining the T4 boxes that are supported in Simply Accounting and how to set up your payroll to properly give the information needed on T4s.

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Simply Accounting Product

## SAS20: Billing Boss, Payment Boss, and Simply Accounting Integration

Plaza A

Presenters: Chuck LeDuc and Peter Liao, Sage

Very small businesses don't always want an accounting solution, but without an invoicing tool, businesses have a hard time keeping accurate invoicing records. Billing Boss is a simple, free online invoicing tool made for businesses that are just starting out, freelancers, and other small businesses that want to have professional-looking invoices and better manage their accounts receivable and cash flow. Attendees will learn to identify the right businesses for Billing Boss, how to get them set up, how it works, and how they can share their data with you online. See how you can synchronize data between Simply Accounting and Billing Boss, getting your manual customers automated and saving yourself the headaches. Also learn how businesses can send their Simply Accounting invoices through Billing Boss and get paid online with Sage Payment Solutions or another merchant provider.

Also recently introduced to add greater functionality to Billing Boss was Payment Boss, which creates a way to take credit card payments using a smart phone. Not only is it an effective way to keep track of your money and get paid faster—it's an amazing time saver for accountants and bookkeepers!

Billing Boss covers people who want to get paid later, Payment Boss covers people who want to get paid immediately, and they work together perfectly—along with Simply Accounting. Attend this session to learn how you can put these integrated solutions to work for you and your clients.

**Day:** Thursday, October 21, 2010

**Time:** 10:00 a.m. – 11:30 a.m.

**Learning Track:** Simply Accounting Product

## SAS21: Grow Your Business With Simply Accounting Intelligence

Plaza A

Presenters: Christina Wong and Charles Teversham, Sage

Learn from the experts how to change your business, grow your revenue, and wow your clients using in-depth reporting with Simply Accounting Intelligence. Whether you're looking to offer additional product support, learn how to profit from report customizations, or just want to offer your clients the next level of reporting, learn how to identify the need, present the value and close on a winwin deal for you and your clients.

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Simply Accounting Product

## TPP01: MISys Manufacturing Software for Simply Accounting

Plaza B

Presenter: MISys Inc.

See how MISys brings industrial strength manufacturing to Simply Accounting. We'll explore the inventory and bills of material in MISys, looking at production schedules, material requirements planning and the demand created for work orders and purchase orders completing the final cycle of finished goods. You'll learn that integration with Simply is easy and complete providing you and your customers a robust manufacturing and accounting system.

**Day:** Friday, October 22, 2010

**Time:** 1:30 p.m. – 3:00 p.m.

**Learning Track:** Third Party Products

# Conference Sessions

## TPP02: CCH Canadian Ltd

Plaza C

Presenter: Gerry Barker, CCH

In this session you will learn how about new tools from CCH Canadian that will help you save time, reduce paper costs, and communicate with your clients more securely and quickly. You'll see the latest in paperless processing for income tax returns and you'll also learn how you can eliminate courier costs and unsafe emailing practices. CCH is the leading provider of accounting and tax tools in Canada. With solutions for the small practitioner, the large firm, and everyone in between, come see what's new from CCH!

**Day:** Thursday, October 21, 2010

**Time:** 1:00 p.m. – 2:00 p.m.

**Learning Track:** Third Party Products

## TPP03: Logicim XLGL – The Evolution of Intelligence

Plaza B

Presenter: Pierre Alain Carrier, Logicim

Logicim XLGL is the most powerful, flexible, and easy-to-use reporting tool for Simply Accounting. XLGL leverages your knowledge of Microsoft Excel, giving you the results you need while offering an outstanding user experience. XLGL 4.0 is the biggest update we've ever made to our software, firmly positioning it as the top solution for your reporting needs. Whether you're new to XLGL or a long time user, come and see the innovation for yourself. You'll be happy you did.

**Day:** Friday, October 22, 2010

**Time:** 3:15 p.m. – 4:45 p.m.

**Learning Track:** Third Party Products

## TPP04: Genius Manufacturing

Plaza B

Presenter: Peter Spitzer, Genius Solutions

Genius™ Solutions delivers manufacturing and job management solutions for custom, engineer-to-order, make-to-order, assemble-to-order environments and companies engaged in manufacturing improvement strategies like Lean Manufacturing. In competitive and challenging times, Genius Manufacturing NG will cut down headaches, delays, unanticipated costs, poor customer response and lead times. Your clients will gain peace of mind, savings, on-schedule delivery, quicker access to real-time information, and better customer service. Bringing your enterprise together, Genius™ Solutions delivers tools to allow a focus on process, on integration of silos of information, and on better relations with customers and suppliers. It provides tools for business intelligence and dashboards that deliver access to information to help you make decisions and keep tabs on the pulse and heartbeat of your business. During this session you will learn about how the Genius Manufacturing Solution integrates with Simply Accounting and how it is a great tool for all of your manufacturing clients.

**Day:** Friday, October 22, 2010

**Time:** 8:00 a.m. – 9:00 a.m.

**Learning Track:** Third Party Products

## TPP05: AccuPOS Point of Sale

Plaza B

Presenter: Joe Pergola, AccuPOS

This session, led by experts from AccuPOS Point of Sale, will explain the opportunity available for you to reach into the vast market for accounting-integrated Point of Sale systems without the traditional challenges many partners and consultants have faced in this sector. Focused on "cash and carry" retail and any form of food service, this award-winning solution brings the inventory and invoicing capabilities of Simply Accounting to cashiers and servers in the form of a touchscreen-friendly POS that anyone can learn in seconds. AccuPOS never takes over critical business management functions, leaving you the expert in the program that still runs the business: Simply Accounting. Come to this session and learn how to differentiate your services from your competition by adding a specialization in Point of Sale.

**Day:** Friday, October 22, 2010

**Time:** 9:15 a.m. – 10:15 a.m.

**Learning Track:** Third Party Products

## TPP06 and TPP06B: Understanding Microsoft Excel PivotTables

Plaza B (Friday)  
Regency E (Saturday)

Presenter: Carla Caldwell, Sage Trainer

Have you ever needed to dynamically filter, sort, or rearrange data in Microsoft Excel? Then come to this session to learn about PivotTables! We'll show you how to quickly and easily turn your spreadsheets into meaningful reports so you can start analyzing the data instead of "wading through it". Whether you are a beginner or looking for additional tips and tricks, this session will help you take your Excel skills to the next level.

**Day:** Friday, October 22, 2010

**Time:** 10:30 a.m. – 12:30 p.m.

**Learning Track:** Third Party Products

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Third Party Products

# Conference Sessions

## TPP07: Canada Revenue Agency: Application of the GST/HST to Charities

Plaza C

Presenter: Bill Burdon, Canada Revenue Agency

This session, led by Canada Revenue Agency (CRA), will focus on how GST/ HST applies to charities. Topics covered include: what a charity is for GST/ HST purposes, what supplies made by a charity are exempt, and which are taxable, registration requirements, rebate information and the GST/HST recovery and remittance process. This session, led by Bill Burdon, a senior technical interpretation analyst with the GST/HST Rulings section of the CRA, is a must attend for anyone that deals with charities in Canada. Bill has been employed by the CRA for 13 years in a variety of positions. Prior to his current role, he was a team leader in the Audit Division for eight years, where he supervised a team of auditors specializing in the underground economy. During this time, he also served as the Underground Economy Audit Coordinator in the Vancouver Tax Services Office. Bill holds a bachelor's degree in accounting and is a recipient of the Queen's Golden Jubilee Medal for outstanding public service.

**Day:** Thursday, October 21, 2010

**Time:** 10:00 a.m. – 11:30 a.m.

**Learning Track:** Third Party Products

## TPP08: Electronic Payments: Payroll Direct Deposit, Vendor Payments and Customer Collections

Georgia B

Presenters: Paul Ellis, Sage and Jane Waite, Beanstream Internet Commerce

Sage Simply Accounting Direct Deposit is a trusted solution for payroll administrators to increase productivity and improve employee's job satisfaction. Find out how easy it is to setup payroll direct deposit with Simply Accounting. Enhancement are on the horizon to help you extend the benefits of electronic payments beyond payroll to vendors and customers. Attendees will get a sneak peek at the latest innovations to electronically pay vendors and collect payments from customers.

**Day:** Thursday, October 21, 2010

**Time:** 2:15 p.m. – 3:15 p.m.

**Learning Track:** Third Party Products

## TPP09: The Digital Office of Today and Tomorrow

Georgia B

Presenter: Alan Salmon, K2 Enterprises

Technology continues to accelerate rapidly, and Simply Accounting consultants need to keep pace. This conference session is designed for those who are not information technology (IT) experts, but who need to update their base knowledge level to serve their clients more efficiently and effectively. In this fast-paced session, Alan will survey today's IT environment, sharing with you the new trends in computer hardware, software, operating systems, and peripheral devices, as well as provide you with an update on Microsoft's new Windows 7 operating system and Office 2010. More importantly, you will be exposed to significant trends in information technology and how to take advantage of the opportunities presented by these trends.

**Day:** Saturday, October 23, 2010

**Time:** 10:00 a.m. – 11:00 a.m.

**Learning Track:** Third Party Products



# Personal Conference Worksheet

Make the most of your conference by using this worksheet to keep track of your goals, objectives, contacts, and takeaways. When you get return to the office, you'll be ready to hit the ground running and build on your experience at conference.

## Learning

Review your sessions schedule, business challenges, and objectives. Find educational opportunities that help you meet your objectives or address a business challenge. Make notes on key takeaways and learnings.

### Sessions I'm attending:

<b>Thursday, October 21</b>	10:00 a.m. – 11:30 a.m.	Session: _____
	1:00 p.m. – 2:00 p.m.	Session: _____
	2:15 p.m. – 3:15 p.m.	Session: _____
<b>Friday, October 22</b>	8:00 a.m. – 9:00 a.m.	Session: _____
	9:15 a.m. – 10:15 a.m.	Session: _____
	10:30 a.m. – 12:30 p.m.	Session: _____
	1:30 p.m. – 3:00 p.m.	Session: _____
	3:15 p.m. – 4:45 p.m.	Session: _____
<b>Saturday, October 23</b>	10:00 a.m. – 11:00 a.m.	Session: _____

### My top three objectives for attending Simply Partnership:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### My top three business challenges:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

### Ideas improvement and change:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

# Personal Conference Worksheet

## Networking

Simply Partnership is your chance to meet partners facing the same challenges you face. Take this opportunity to learn what others are doing differently and put together an action plan filled with ideas you can put to use back at the office.

### Business Contacts:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

### Sage Contacts

#### Account Manager:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

#### Other Sage Contacts:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_



# Personal Conference Worksheet

## Discovery

The Trade Show offers a smorgasbord of innovations for Sage Simply Accounting business partners. New revenue streams to tap into. New vertical markets to conquer.

### Jot down the booths you want to visit:

Exhibitor/Vendor: _____	Booth No: _____
Exhibitor/Vendor: _____	Booth No: _____
Exhibitor/Vendor: _____	Booth No: _____
Exhibitor/Vendor: _____	Booth No: _____
Exhibitor/Vendor: _____	Booth No: _____

### Exhibitor Contacts:

Name: _____	Phone: _____
Name: _____	Phone: _____
Name: _____	Phone: _____
Name: _____	Phone: _____
Name: _____	Phone: _____

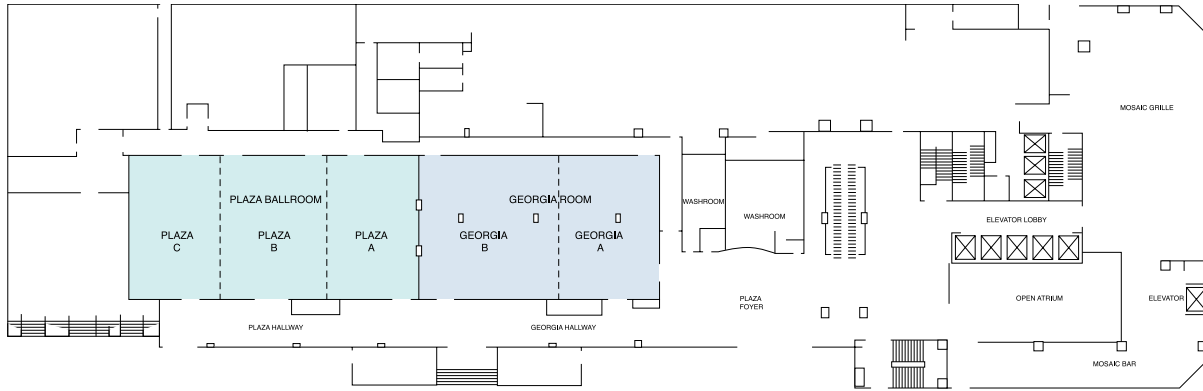
## Action

After the conference concludes, set aside some time while it's fresh in your mind to reflect on what you learned, who you met, and the innovations that could benefit your business and crush the competition. Apply your results and gain value.

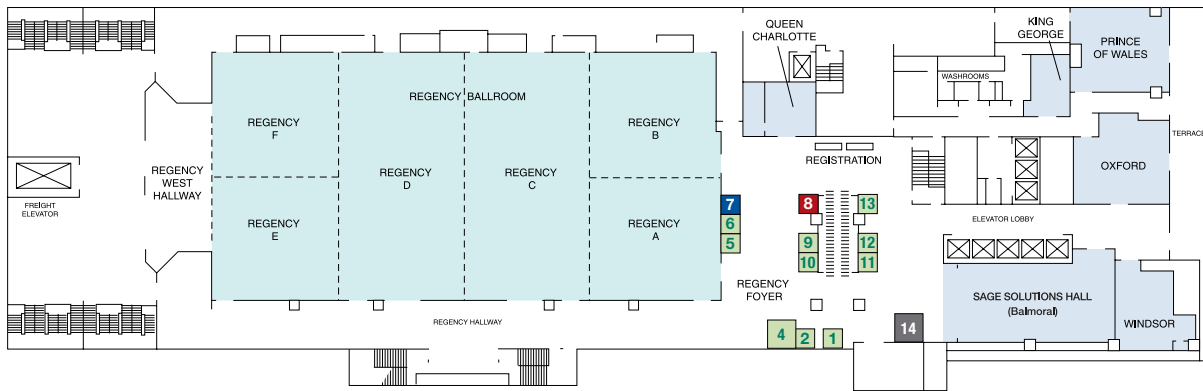
Action: _____	Priority Level: _____
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Action: _____	Priority Level: _____

# Hotel Floor Plan

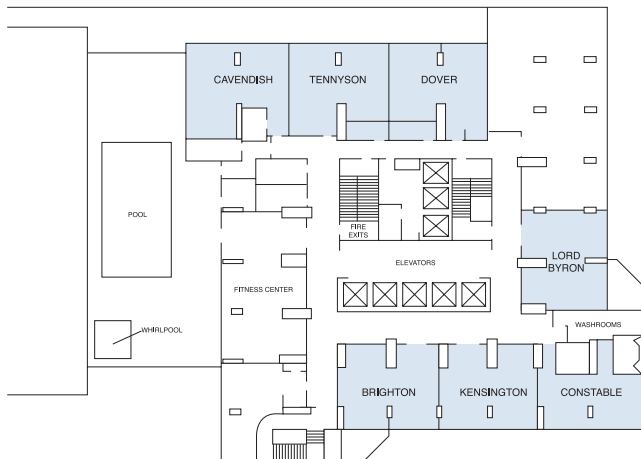
## Plaza Level (Second Floor)



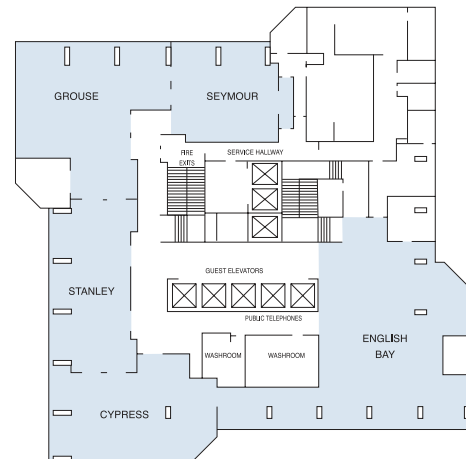
## Convention Level (Third Floor)



## Fourth Floor



## Perspectives Level - 34th Floor





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