

Session Schedule

Thursday, September 22, 2011

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Business Development	Reporting	
7:00 a.m.–8:15 a.m.	First Timer Welcome Session and Breakfast					
7:30 a.m.–8:15 a.m.	General Breakfast					
8:15 a.m.–8:30 a.m.	Welcome					
8:30 a.m.–9:00 a.m.	General Session: Sage Simply Accounting—A Look Into the Future					
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.	<p>SSA1: Sage Simply Accounting New Customer Acquisition Roundtable</p> <p>Liz McClellan, Sage Monet 1</p>	<p>SSA10: Computer Networking 101</p> <p>Tony Yip, Sage Accountants Network Member Monet 2</p>	<p>CFL1: An Introduction to Sage ACT! Contact Management Software</p> <p>Paul Buckley, Sage Monet 3</p>	<p>TPP1: Logicim XLGL—Reporting for Everyone</p> <p>Pierre Alain Carrier from Logicim Gauguin 1</p>	<p>BDV2: Customer Service Unstuck: How to Deliver World Class Customer Service for a Competitive Advantage</p> <p>Barry Moltz Degas 1</p>	<p>REP1: Creating a Custom Report Using Sage Simply Accounting Intelligence</p> <p>Gary Olynik, Sage Accountants Network Member Gauguin 2</p>
11:30 a.m.–1:00 p.m.	Awards Luncheon					
1:00 p.m.–2:00 p.m.	<p>SSA2: Sage Simply Accounting Form Designer</p> <p>Jo-Anne Mercer, Sage Accountants Network Member Monet 1</p>	<p>SSA11: Sage Simply Accounting Accountants Edition Roundtable</p> <p>Sage Simply Accounting Product Management Team Monet 2</p>	<p>CFL2: Using Sage E-marketing to Enhance Customer Relationships</p> <p>Paul Buckley, Sage Monet 3</p>	<p>TPP2: Retail and Restaurant Point of Sale (POS) for Sage Simply Accounting Users</p> <p>Joe Pergola, AccuPOS Sales Manager Gauguin 1</p>	<p>BDV1: The “Best of” Consulting from Consultants</p> <p>Marge Wegren-Debre, Sage Accountants Network Member Degas 1</p>	<p>REP2: Understanding Microsoft Excel Pivot Tables</p> <p>Cheryl Manmohan, Alchemex Gauguin 2</p>
2:00 p.m.–2:15 p.m.	Move to Next session					
2:15 p.m.–3:15 p.m.	<p>SSA3: The Sage Simply Accounting 2012 Product Line-Up</p> <p>Alistair Ellis, Sage Monet 1</p>	<p>SSA12: Thinking Outside the Box</p> <p>Leyla Szabo-Kustan, Sage Accountants Network Member Monet 2</p>	<p>CFL3: Demystifying Credit Card Processing Fees</p> <p>Penny Corrigan, Sage Payment Solutions and Paul Ellis, Sage Monet 3</p>	<p>TPP3: Client Track</p> <p>David Merritt, Client Track Gauguin 1</p>	<p>BDV3: Using Twitter to Market Your Business</p> <p>Kim Creamore, Sage Degas 1</p>	<p>REP3: Utilizing Named Ranges in Microsoft Excel</p> <p>Carla Caldwell, Sage Gauguin 2</p>
3:15 p.m.–3:45 p.m.	Coffee Break in the Trade Show and Move to Next Session					
3:45 p.m.–4:45 p.m.	Keynote Featuring Barry Moltz					
5:00 p.m.–7:00 p.m.	Homecoming Reception and Trade Show					

Session Schedule

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8:00 a.m.–9:00 a.m.	Breakfast					
9:00 a.m.–10:00 a.m.	<p>SSA4: Using Time Slips, Billings, and Payroll Sue du Puy, Sage Monet 1</p>	<p>SSA14: Sage Simply Accounting Product Roundtable (Offered Twice) Sage Simply Accounting Product Management Team Monet 2</p>	<p>CFL4: Return on Employee Investment Mark Butje, Sage Monet 3</p>	<p>TPP4: Pay Anyone Electronically (without Collecting Banking Information) Telpay Inc. Gauguin 1</p>	<p>BDV4: You Unstuck: How to Skyrocket Your Own Personal Productivity Barry Moltz Degas 1</p>	<p>REP4: Creating Custom Sage Simply Accounting Dashboards in Under 30 Minutes Les Allen, Alchemex Gauguin 2</p>
10:00 a.m.–10:15 a.m.	Move to Next Session					
10:15 a.m.–11:45 a.m.	<p>SSA5: Inventory Management with a Focus on Light Manufacturing Debra Feltham, Sage Accountants Network Member Monet 1</p>	<p>SSA16: Training and Presenting Best Practices for Simply Accounting Consultants Randy Bacchus Monet 2</p>	<p>CFL5: Sage Accountants Network and Nonprofits—Expanding Your Expertise Bonnie McLain, Sage Monet 3</p>	<p>TPP5: Genius Manufacturing Genius Manufacturing Gauguin 1</p>	<p>BDV5: High Impact Hiring in the New Talent Landscape Lili Cordeiro and Chad Godhard, Sage Degas 1</p>	<p>REP5: Sage Simply Accounting Intelligence Roundtable Sage Simply Accounting Product Management Team and Alchemex Gauguin 2</p>
11:45 a.m.–12:00 p.m.	Snack Attack and Move to Next Session					
12:00 p.m.–1:00 p.m.	<p>SSA6: Payroll Fundamentals Sue du Puy, Sage Monet 1</p>	<p>SSA15: Sage Simply Accounting Rebranding Townhall (Offered Twice) Dennis Frahmman, EVP, Corporate Marketing, Sage North America Monet 2</p>	<p>CFL6: Finding the Right Solution for Your Construction Client Sage Construction and Real Estate Monet 3</p>	<p>TPP6: Dealing with Manufacturers: A Primer. By MISys Manufacturing Charlie Kimbell, MISys Gauguin 1</p>	<p>BDV6: Sales Unstuck—How to Get Your Sales Growing Fast Barry Moltz Degas 1</p>	<p>REP6: Advanced: Creating a Data Container Using Sage Simply Accounting Intelligence Les Allen, Alchemex Gauguin 2</p>
1:00 p.m.–3:00 p.m.	Learn How to Gamble (Room: Degas 2)					
1:00 p.m.–5:30 p.m.	Senior Ditch Day! Visit the Trade Show and Las Vegas					
2:30 p.m.–4:00 p.m.	SSA15: Sage Simply Accounting Rebranding Townhall (Offered Twice). Presenter: Dennis Frahmman, Executive Vice President, Corporate Marketing, Sage North America (Room: Monet 1)					
5:30 p.m.–7:00 p.m.	Cocktail Reception and Trade Show					
7:00 p.m.–12:00 a.m.	Partnership Prom Theme Party—Wear Your Finest Prom Attire!					

Session Schedule

Saturday, September 24, 2011

Time	Sage Simply Accounting Product	Customers for Life	Third Party Products	Business Development	Reporting	
9:00 a.m.–10:00 a.m.	Breakfast					
10:00 a.m.–11:30 a.m.	<p>SSA7: Sage Simply Accounting Setup—Consultant’s Best Practices and Tips and Tricks</p> <p>Sue du Puy, Sage</p> <p>Monet 1</p>	<p>SSA14: Sage Simply Accounting Product Roundtable (Offered Twice)</p> <p>Sage Simply Accounting Product Management Team</p> <p>Monet 2</p>	<p>CFL7: An Introduction to the Sage ERP Portfolio</p> <p>Randy Bacchus, Sage</p> <p>Da Vinci 4</p>	<p>TPP7: Additional Recurring Revenue for Sage Simply Accounting Business Partners</p> <p>Hugh Johnson, SVP Sales, Sunico</p> <p>Gauguin 1</p>	<p>BDV7: Five Steps to Radical Business Growth</p> <p>Rob Johnson, Author</p> <p>Degas 1</p>	<p>REP7: Microsoft® Excel® Tips, Tricks, and Techniques for Accountants</p> <p>Alan Salmon, K2 Enterprises</p> <p>Gauguin 2</p>
11:30 a.m.–1:00 p.m.	Commencement Luncheon with Ed Kless and Rob Johnson					
1:15 p.m.–2:15 p.m.	<p>SSA8: Top Tech Support Triggers and How to Solve Them</p> <p>Naz Gigaseri, Sage</p> <p>Monet 1</p>	<p>SSA13: Sage Simply Accounting Tips and Tricks</p> <p>Alistair Ellis, Sage</p> <p>Monet 2</p>	<p>CFL8: Sage Fixed Assets</p> <p>Jason West, Sage</p> <p>Da Vinci 4</p>	<p>TPP8: Preparing Corporate Taxes Using Sage Simply Accounting with T2Canada.ca</p> <p>Jeff MacFarlane, C.A.</p> <p>Gauguin 1</p>	<p>BDV8: Recruiting Boot Camp: Create a Compelling Job Ad That Really Gets Results!</p> <p>Lili Cordiero and Chad Godhard, Sage</p> <p>Degas 1</p>	<p>REP8: Fast Track SSSAI for Crystal Report Writers (Part 1)</p> <p>Darryl Smith, Alchemex</p> <p>Gauguin 2</p>
2:15 p.m.–2:30 p.m.	Coffee Break and Move to Next Session					
2:30 p.m.–3:30 p.m.	<p>SSA9: Bank and Account Reconciliation</p> <p>Sue du Puy, Sage</p> <p>Monet 1</p>	<p>SSA17: Sage Simply Accounting Business Partner Program Roundtable</p> <p>Jennifer Warawa and the Partner Programs Team, Sage</p> <p>Monet 2</p>	<p>CFL9: Connected Services: How to Leverage the Web and Mobility to Enhance On-Premise Solutions</p> <p>Bryson Hale, Sage</p> <p>Da Vinci 4</p>	<p>TPP9: Direct Payments: Employee Direct Deposit, Customer Pre-Auth Debit, and Vendor Direct Deposit</p> <p>Paul Ellis, Sage</p> <p>Gauguin 1</p>	<p>BDV9: The Digital Office of Today and Tomorrow</p> <p>Alan Salmon, K2 Enterprises</p> <p>Degas 1</p>	<p>REP9: Fast Track SSSAI for Crystal Report Writers (Part 2)</p> <p>Darryl Smith, Alchemex</p> <p>Gauguin 2</p>

Conference Sessions

These sessions are listed numerically and by learning track.

BDV1: The “Best of” Consulting from Consultants

Degas 1

Presenter: Marge Wegren-Debre, Sage Accountants Network Member

We all know that we have a vibrant community of Sage Simply Accounting consultants that are experienced and passionate about their business. Have you ever wondered how they branched out or arrived at their level of success? In this session, long-time Sage Accountants Network member, Marge Wegren-Debre will share with you some beliefs and success principles gathered from top consultants. Attendees will walk away with insights on some successful practices in our industry that may help you transform your own consulting business.

Day: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Business Development

BDV2: Customer Service Unstuck: How to Deliver World Class Customer Service for a Competitive Advantage

Degas 1

Presenter: Barry Moltz

In this fast-paced session, small business expert Barry Moltz guides attendees through the path to delivering world-class customer experience and how it is fundamental to having a competitive advantage. This session will cover why customer service is the new marketing, how to personalize for each customer, how to bust the 20 myths of customer service that hold your company back, how to determine the economic value each customer contributes, how to develop a two-way customizable customer service manifesto, and how to get your best customers to stay and fire the bad ones to leave. Regardless of what stage you are at in your business, you won't want to miss this session!

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Business Development

BDV3: Using Twitter to Market Your Business

Degas 1

Presenter: Kim Creamore, Sage

Twitter reaches more than 200 million registered users. Many of the participants on Twitter focus their energy on growing a business and becoming better educated about business topics. Getting started with a Twitter account is easy. Once you are up and running, following a process to get past the initial learning curve will ensure success with your Twitter marketing efforts. Join us and learn how to become an advanced Twitter user in just six short weeks!

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Business Development

BDV4: You Unstuck: How to Skyrocket Your Own Personal Productivity

Degas 1

Presenter: Barry Moltz

Every business person has experienced getting in a rut at one point or another. This session will help you move beyond where you are at now by giving you lessons and tools to skyrocket your own personal productivity. During this session, Barry will share with you how to focus by striving for “minimal achievement”, the Minimalist Approach that gets things done and how narrowing your focus can lead to higher profits. If you're looking to transform your business model and move beyond the ordinary, make sure you attend Barry's high impact session.

Day: Friday, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Business Development

BDV5: High Impact Hiring in the New Talent Landscape

Degas 1

Presenters: Lili Cordeiro and Chad Godhard, Sage

Your employees are your most valuable asset. And when it comes to hiring, competition for talent continues to be a challenge. To attract talented employees, you need a plan. Learn how you can make your business stand out in the crowd by understanding five key employee trends that are changing hiring practices today. Get an insider's perspective on what the top talent leaders are doing in their organizations to find, attract, and hire key talent. In this session, you will learn how to focus your recruiting approach and leverage low-cost tools that get you results that matter.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Business Development

BDV6: Sales Unstuck—How to Get Your Sales Growing Fast

Degas 1

Presenter: Barry Moltz

Whether you like to admit it or not, you're a salesperson. You may not be selling a product, but you are always selling yourself, your business, and your ideas. During this dynamic session, Barry will share with you how to break “the double helix trap” of servicing clients and selling to new prospects, how to building systematic relationships so your business is always marketing itself, and how to implement “Rapid Release” solutions.

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Business Development

Conference Sessions

BDV7: Five Steps to Radical Business Growth

Degas 1

Presenter: Rob Johnson, Sage

Creating an environment of sustained superior growth within a business isn't easy. In fact, it is hard. The result of that hard reality is that most businesses fail to achieve the business growth and success they desire. If you're not reaching your full potential; either as a salesperson or a business owner—and you want to achieve greater success—plan on attending this dynamic session. To change the arc of your business's potential, and achieve the results you desire, you need to follow a simple five step plan. In this dynamic, interactive session, Rob Johnson, author of the book *Kick Your Own Ass—The Will, Skill and Drill of Selling More Than You Thought Possible*, will explore five simple steps you can take that can have a dramatic impact on your performance.

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Business Development

BDV8: Recruiting Boot Camp: Create a Compelling Job Ad That Really Gets Results!

Degas 1

Presenters: Lili Cordiero and Chad Godhard, Sage

Sage ERP Accpac, an international mid-market leader and industry-award-winning 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: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Business Development

BDV9: The Digital Office of Today and Tomorrow

Degas 1

Facilitator: Alan Salmon, K2 Enterprises

Technology continues to accelerate rapidly, and Sage Simply Accounting consultants need to keep pace. This 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, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Business Development

CFL1: An Introduction to Sage ACT! Contact Management Software

Monet 3

Presenter: Paul Buckley, Sage

The latest version of Sage ACT! is full of powerful new enhancements. You'll want to be sure you attend this session to get the information you need to successfully use, recommend, support, and even sell Sage ACT!, Sage's contact management software for small businesses. In this session, we will give a general overview of the Sage ACT! product and explore the how you can put its powerful functionality to work for you and your clients.

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Customers For Life

CFL2: Using Sage E-marketing to Enhance Customer Relationships

Monet 3

Presenter: Paul Buckley, Sage

Email marketing is a powerful solution for any business. Sage E-marketing is about much more than delivering coupons to customers—it's about enhancing customer relationships and becoming more efficient in the process! Learn how to use Sage E-marketing for ACT!, which is directly integrated with the Sage ACT! contact management solution, or use it by itself as a standalone, on-demand solution. Get started right away and send your first email campaign today.

Day: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Customers For Life

Conference Sessions

CFL3: Demystifying Credit Card Processing Fees

Monet 3

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

Find out how to get the lowest fees in the industry and sign up for credit card processing from Sage easily! In this session, learn the benefits, cost advantages and legalities behind processing credit card transactions and how the integration of Sage Payment Solutions and Sage Simply Accounting can save you—and your clients—time and money.

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Customers For Life

CFL4: Return on Employee Investment

Monet 3

Presenter: Mark Butje, Sage

Why are some companies thriving and others suffering to stay in business? What is the distinctive difference between a good company and a great company? The answer to these questions can only be found when looking at what defines the company: their people. The people are the company's most unique and greatest asset. For most companies, it is also the largest expense, or, better put: the largest investment. This crucial, discriminating company investment needs a healthy return. We call that the Return on Employee Investment or ROEI. During this session, attendees will see how Sage Abra HRMS and its connected services positively affect the competitiveness and bottom line of an organization, increasing the ROEI.

Day: Friday, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Customers For Life

CFL5: Sage Accountants Network and Nonprofits—Expanding Your Expertise

Monet 3

Presenter: Bonnie McLain, Sage

Nonprofits and their financial advisors are looking for the tools and resources to help them succeed in delivering fundraising effectiveness, financial transparency, and effective grant management. This session will be an overview of the tips, tricks, and solutions available to SAN members through an exciting new bundle of Sage Nonprofit Solutions tools, including:

- Maximize funding success with Grant Management tools.
- Expand the base with simple and effective online fundraising solutions.
- Leverage resources with a comprehensive fundraising, development, and donor management solution.
- Provide transparency and accountability with financial management tools specifically designed to meet the needs of the nonprofit sector.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Customers For Life

CFL6: Finding the Right Solution for Your Construction Client

Monet 3

Presenter: Sage Construction and Real Estate

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.

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Customers For Life

CFL7: An Introduction to the Sage ERP Portfolio

Da Vinci 4

Presenter: Randy Bacchus, Sage

Sage offers one of the largest selections of scalable, integrated enterprise resource planning (ERP) software solutions available. Our ERP systems can help you improve the way you do business and reach a new level of performance by integrating all business processes and accelerating performance, managing growth, and quickly adapting to changing market conditions, reducing costs and managing risks, all while enhancing collaboration and delivering more value to customers. During this session, attendees will get an overview of the Sage ERP business solutions that are designed to help business achieve these goals. With Sage ERP MAS, Sage ERP Accpac, and Sage ERP X3, Sage ERP solutions can support a wide variety of businesses, from start-ups to complex multidivisional organizations, with local or global operations, in services, distribution or manufacturing industries. Join us to learn about the Sage solutions available for your clients after they outgrow Sage Simply Accounting.

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Customers For Life

Conference Sessions

CFL8: Sage FAS Fixed Assets

Da Vinci 4

Presenter: Jason West, 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: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Customers For Life

CFL9: Connected Services: How to Leverage the Web and Mobility to Enhance On-Premise Solutions

Da Vinci 4

Presenter: Bryson Hale, Sage

Doing business in “The Cloud” is seemingly unquestionable as a future information technology initiative for most organizations—big or small. Many companies have invested a tremendous amount of resources into much-needed and effective on-premise solutions for their business. These organizations may see the value of web-based business solutions, but may not be prepared to divest their current technologies and put all their eggs in “The Cloud” basket. In this informative session, learn how Sage Employer Solutions is leveraging best-of-breed web-based solutions and services by securely connecting them to our on-premise products, such as Sage Abra HRMS. It is through this “connected services” strategy that Sage is providing customers the power of on-premise, but with the reach of The Cloud.

Day: Saturday, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Customers For Life

REP1: Creating a Custom Report Using Sage Simply Accounting Intelligence

Gauguin 2

Presenter: Gary Olynik, Sage Accountants Network Member

Users of Sage Simply Accounting can quickly learn to harness the abilities of Sage Simply Accounting Intelligence (SSAI) to create powerful Business Intelligence Reports. This session will give you the tools you need to create customized reports for your clients and will help you learn how to modify standard reports to easily develop custom reports for your clients in minutes. In this session, we will modify a standard sales report to generate a commission report and display the output in a visual dashboard.

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Reporting

REP2: Understanding Microsoft® Excel® Pivot Tables

Gauguin 2

Presenter: Cheryl Manmohan, Alchemex

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: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Reporting

REP3: Utilizing Named Ranges in Microsoft Excel

Gauguin 2

Presenter: Carla Caldwell, Sage

Using named ranges in Microsoft Excel can make formulas easier to understand and maintain. Learn how to create and use this powerful feature to dynamically update tables and PivotTables, and more quickly create and maintain formulas. This session will help you to be more efficient as you work in Microsoft Excel with common formulas and techniques, and exercises to work on back in the office.

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Reporting

REP4: Creating Custom Sage Simply Accounting Dashboards in Under 30 Minutes

Gauguin 2

Presenter: Les Allen, Alchemex

In this one-hour session, learn the skills to create a dashboard in Microsoft® 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, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Reporting

Conference Sessions

REP5: Sage Simply Accounting Intelligence Roundtable

Gauguin 2

Presenters: Sage Simply Accounting Product Management Team and Alchemex

So you love Sage Simply Accounting Intelligence, but have a list of great ideas on features, functionality, and reports you'd love to see become part of future releases and the product roadmap. Bring your Sage Simply Accounting Intelligence to this session and make sure your voice is heard by our Product Management team on where you think the product roadmap should go.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Reporting

REP6: Advanced: Creating a Data Container Using Sage Simply Accounting Intelligence

Gauguin 2

Facilitators: Sage Simply Accounting Product Management Team and Alchemex

This session will go through how to create reports using data fields beyond those that are used in the pre-packaged Sage Simply Accounting Intelligence report templates. In this session, you will learn how to use the Database Administration tool to create containers and gain access to data in modules like inventory, sales, and more. This session is for anyone looking to take their basic Sage Simply Accounting Intelligence skills to the next exciting level!

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Reporting

REP7: Microsoft Excel Tips, Tricks, and Techniques for Accountants

Gauguin 2

Presenter: Alan Salmon, K2 Enterprises

Excel is the accountant's tool of choice for analyzing and reporting financial data, yet most accountants have never received any formal Excel training. As a result, many accountants use time-consuming and error-prone processes to complete everyday tasks. This highly acclaimed course contains dozens of tips, tricks, and techniques to improve your productivity and accuracy. Its content is based on over 20 years of experience in delivering Excel training to accountants and on feedback from tens of thousands of accounting and financial professionals just like you. This session includes insights into productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials. If you are an Excel user, regardless of your level of experience, and you have never taken a formal Excel training course for accountants, you will love this session!

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Reporting

REP8: Fast Track SSSAI for Crystal Report Writers (Part 1)

Gauguin 2

Presenter: Darryl Smith, Alchemex

Experienced crystal report writers with existing SQL skills can very quickly begin to leverage the power of SSAI. This session is aimed at showing you how you can quickly port your existing skills for use with SSAI. Whether you have clients that want new custom SSAI reports, existing reports ported to SSAI or if you want reuse your custom own Crystal report IP in SSAI then this session is for you.

Day: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Reporting

REP9: Fast Track SSSAI for Crystal Report Writers (Part 2)

Gauguin 2

Presenter: Darryl Smith, Alchemex

Experienced crystal report writers with existing SQL skills can very quickly begin to leverage the power of SSAI. This session is aimed at showing you how you can quickly port your existing skills for use with SSAI. Whether you have clients that want new custom SSAI reports, existing reports ported to SSAI or if you want reuse your custom own Crystal report IP in SSAI then this session is for you.

Day: Saturday, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Reporting

SSA1: Sage Simply Accounting New Customer Acquisition Roundtable

Monet 1

Presenter: Liz McClellan, Sage

Don't miss this collaborative session between Sage Accountants Network members and the new customer acquisition marketing team at Sage Simply Accounting. During this session, the marketing team will share with you their strategic plans for 2012 acquisition marketing and will also ask attendees to share their latest insights into what the competitive landscape looks like, network, and collaborate on effective methods to acquire new customers, sharing marketing initiatives that succeed in an ever-evolving business environment.

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Sage Simply Accounting

Conference Sessions

SSA2: Sage Simply Accounting Form Designer

Monet 1

Presenter: Jo-Anne Mercer, Sage Accountants Network Member

Understand the secrets of the Simply Form Designer. "File Does Not Exist" (The Urban Myth) will be unveiled and resolved. Is there a vital piece of information that must be on your form, but you have no place to put it? Jo-Anne will share with you how you can easily add that important information to your form permanently by going "Beyond the Box!" Do you have French or Spanish speaking customers or vendors who need to understand your English forms? Join us in this Simply Form Designer session and discover the joy of form design!

Day: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Sage Simply Accounting

SSA3: The Sage Simply Accounting Product Line-Up

Monet 1

Presenter: Alistair Ellis, Sage

Whether you're new to the Sage Simply Accounting product line-up or haven't taken an in depth look at the product line-up in a while, this is a great session for you. Attendees will be taken through an overview of the entire Sage Simply Accounting product line-up, including feature differentiation and positioning of First Step, Pro, Premium, Enterprise and the Accountants' Edition. Learn how our products compare to each other and also how they are competitively different in the marketplace.

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Sage Simply Accounting

SSA4: Using Time Slips, Invoices, and Payroll

Monet 1

Presenter: Sue du Puy, Sage

It is a known fact that in some cases, when a business uses a time slip system their billable time increases and so do their profits. Join us for this session on the benefits of using Time Slips in Sage Simply Accounting. This session will show attendees how to implement and use Time Slips, how to pull the time slips information into employee's payroll cheques and generate customer sales invoices from the time slip entries. Attendees will also review the Time and Billing reports available, which will ultimately help your clients.

Day: Friday, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Sage Simply Accounting

SSA5: Inventory Management with a Focus on Light Manufacturing

Monet 1

Presenter: Debra Feltham, Sage Accountants Network Member

During this session, long-time Sage Accountants Network member Debra Feltham will demonstrate how to use Sage Simply Accounting Inventory Management and Sales Order tracking in a light manufacturing and distribution company, and will also demonstrate alternative uses of "Sales Order" tracking for hospitality businesses. After participating in this session, attendees will be able to setup and manage inventory in a light manufacturing business environment or in a distribution company where freight and brokerage are a significant component in the "landed cost" of the inventory. Understanding this process will allow you to assist your clients in understanding gross profit management . . . or in having a better understanding of gross profit management, and will result in more accurate financial statements on an ongoing basis. Attendees will learn various options for using the "sales orders" function to track "deferred revenues" and will be able to use this feature to track custom orders, or future "bookings" for a hospitality business.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Sage Simply Accounting

SSA6: Payroll Fundamentals

Monet 1

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 also be exploring the ROE Web feature in Sage Simply Accounting and how the direct deposit service works. If you haven't had a lot of experience with payroll in Sage Simply Accounting or you aren't sure if you are utilizing all the features of the payroll module, this session is for you!

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Sage Simply Accounting

SSA7: Sage Simply Accounting Setup—Consultant's Best Practices and Tips and Tricks

Monet 1

Presenter: Sue du Puy, Sage

This session is for consultants that are beyond the basics of creating a new company in Simply Accounting. Learn how to set up a company right the first time regardless of industry. Look to share consulting best practices and techniques on evaluating business needs as to how to set up various types of companies. How to avoid common pitfalls in setting up inventory, payroll . . . Demonstrations on keys to establishing new and existing businesses or businesses moving from other accounting software. Leave this session understanding how to optimize any company configuration settings within Sage Simply Accounting.

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Sage Simply Accounting

Conference Sessions

SSA8: Top Tech Support Triggers and How to Solve Them

Monet 1

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.

Day: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Sage Simply Accounting

SSA9: Bank and Account Reconciliation

Monet 1

Presenter: Sue du Puy, Sage

Account reconciliation is one of the most important steps that a business should be completing as part of their month and year-end procedures. This session will demonstrate how to set up and use the Account Reconciliation feature in Sage Simply Accounting. Attendees will learn the necessary steps involved in reconciling both a new and existing bank account and also a credit card payable account. The session will wrap up with viewing the most commonly used Account Reconciliation reports.

Day: Saturday, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Sage Simply Accounting

SSA10: Computer Networking 101

Monet 2

Presenter: Tony Yip, Sage Accountants Network Member

This session is for beginners who want to learn about the various types of networks and how they work. Topics covered during this session include: what is a network, what hardware do you need to support a network, TCP/IP—how computers find each other, how computers get their addresses (DHCP versus static IP address), private versus public IP addresses, types of networks and their differences and how to determine what type of network is best for your clients. If you haven't had much experience with networking, make sure you attend this session—it will help take the mystery out of networking!

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Sage Simply Accounting

SSA11: Sage Simply Accounting Accountants Edition Product Roundtable

Monet 2

Facilitators: Sage Simply Accounting Product Management Team

The Sage Simply Accounting Accountants Edition was introduced in Version 2006 and much of the functionality is the same as when it was launched. Although Sage Accountants Network members are content with the existing functionality, we would like to explore what additional functionality accountants and bookkeepers would like to see in future releases. Join us for a round table just focusing on the Sage Simply Accounting Accountants Edition as we build our product roadmap for the future.

Day: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Sage Simply Accounting

SSA12: Thinking Outside the Box

Monet 2

Presenter: Leyla Szabo-Kustan, Sage Accountants Network Member

This session will provide an opportunity for advanced users of Sage Simply Accounting to see creative uses of the software. Presenter Leyla Szabo-Kustan, a long-time user of Sage Simply Accounting, firmly believes that consultants willing to embrace “Thinking Outside The Box” will take their consulting practice to higher levels by creating solutions that truly meet their clients' specific requirements. If you have attended this well received session in the past, don't let that stop you from attending this year—content is all new!

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Sage Simply Accounting

SSA13: Sage Simply Accounting Tips and Tricks

Monet 2

Presenter: Alistair Ellis, Sage

Are you using Sage Simply Accounting as efficiently as possible? Over the years, there have been a number of enhancements made to Sage Simply Accounting. Some are big changes and quite evident. Others are small changes and may go unnoticed. Come and learn about some of the small improvements made over the years which may help save you and your clients' time when doing the bookkeeping.

Day: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Sage Simply Accounting

Conference Sessions

SSA14: Sage Simply Accounting Product Roundtable (Offered Twice)

Monet 2

Facilitators: 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 Sage Simply Accounting.

Day: Friday, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Sage Simply Accounting

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Sage Simply Accounting

SSA15: Sage Simply Accounting Rebranding Townhall (Offered Twice)

Monet 2 (12:00 p.m.–1:00 p.m.)

Presenter: Dennis Frahmman, Executive Vice President, Corporate Marketing, Sage North America

Monet 1 (2:30 p.m.–4:00 p.m.)

In July, Sage announced Sage Simply Accounting is going to be changing its name next year and, as expected, this raised many questions from the partner community. In this townhall session, Dennis Frahmman, EVP of Corporate Marketing for Sage North America, will share the Sage North America branding strategy, how the partner community will be supported through these changes and answer any questions.

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Sage Simply Accounting

Day: Friday, September 23, 2011

Time: 2:30 p.m.–4:00 p.m.

Learning Track: Sage Simply Accounting

SSA16: Training and Presenting Best Practices for Simply Accounting Consultants

Monet 2

Presenter: Randy Bacchus

Presenting software solutions to clients and teaching them how to use it requires the right balance of passion, patience, and preparation. In this session, attendees will learn simple tips and tricks that they can use right away to improve their presentation and teaching techniques. How do you explain complex processes in simple terms that your clients can understand? What's the best way to deal with a know-it-all when teaching? Is it even possible to get an audience excited about accounting software? Everything from the way you stand to the way you move your mouse shows how confident you are when presenting. Attend this session to learn how to present with a confident professional image and teach for maximum effectiveness.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Sage Simply Accounting

SSA17: Sage Simply Accounting Business Partner Program Roundtable

Monet 2

Presenters: 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: Saturday, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Sage Simply Accounting

TPP1: Logicim XLGL—Reporting for Everyone

Gauguin 1

Presenter: Pierre Alain Carrier from Logicim

Logicim XLGL gives you an outstanding experience in not only producing beautiful and informative reports, but also in allowing you to use simple tools to get those results. Whether you're an advanced Excel user or a beginner, a bookkeeper, an accountant, or a business owner, XLGL is sure to give you the information you need at the moment you need it, with no specialized knowledge and no complex process. Click and drag, open, and save: that sums it up. Join us to learn what's new in XLGL and how it can help you and your clients.

Day: Thursday, September 22, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Third Party Products

Conference Sessions

TPP2: Retail and Restaurant Point of Sale (POS) for Sage Simply Accounting Users

Gauguin 1

Presenter: Joe Pergola, AccuPOS Sales Manager

In this session, accounting-integrated Point of Sale (POS) solution experts from AccuPOS present ten ways their cashier system actually increases Sage Simply Accounting ROI. AccuPOS is the only POS system ever to be “Endorsed by Sage” and directly harnesses the inventory/invoicing capabilities of Sage Simply Accounting, delivering a bottom-line-improving transaction method supported everywhere in the world. Attend this session and gain new ways to expand your consulting services by adding a specialization in accounting-integrated Point of Sale. Retail and restaurant client opportunities will be discussed and a free ROI calculator will be provided to those who attend.

Day: Thursday, September 22, 2011

Time: 1:00 p.m.–2:00 p.m.

Learning Track: Third Party Products

TPP3: Client Track

Gauguin 1

Presenter: David Merritt, Client Track

This is your opportunity to learn how Client Track can take control of your practice. Client Track is a highly acclaimed software package which is designed specifically for accounting professionals to help them manage their practices.

This session will provide an overview of Client Track and the features that allow you to easily manage all of your tasks and remittances, streamline all of your task tracking, time and billing, client management, documentation, and appointment scheduling in one simple, easy-to-use program. You will also learn how to automatically notify all of your clients of their upcoming deadlines, or quickly create labels, and merge client information directly into documentation like privacy policies, engagement letters, etc.

You will find out how Client Track can substantially increase the organization and communication within your office, so that you and all of your staff always know exactly what needs to be done and when. This is your opportunity to finally take control of your growing practice and implement a very cost-effective solution which will handle all of your client management needs.

Day: Thursday, September 22, 2011

Time: 2:15 p.m.–3:15 p.m.

Learning Track: Third Party Products

TPP4: Pay Anyone Electronically (without Collecting Banking Information)

Gauguin 1

Presenter: Telpay Inc.

Finally, a proven way to eliminate writing cheques through electronic payments. Learn how your clients can pay anyone (including all suppliers, CRA remittances, employees, etc.) through the seamless integration between Simply Accounting and Telpay for Business. In this session, you will learn how to solve these issues:

- Are your clients on the go and often too time strapped to make it to the office? They can use remote authorization to approve payments.
- Are your clients frustrated with the process of trying to collect the banking information from their suppliers? Let Telpay do it for them.

We will also show you how Telpay can streamline your accounts payable process by; consolidating payments which will simplify month end bank reconciliations, eliminating the need to stuff envelopes and sign cheques, removing the chance of cheque fraud, and eliminating outstanding cheques. Learn what thousands of enthusiastic customers already know—Telpay is the better way to pay.

Attend this session to TRIPLE your chances of winning a new iPad2!

Day: Friday, September 23, 2011

Time: 9:00 a.m.–10:00 a.m.

Learning Track: Third Party Products

TPP5: Genius Manufacturing

Gauguin 1

Presenter: Genius Manufacturing

Genius® Solutions delivers manufacturing and job management solutions for all types of manufacturing environments including make-to-stock, engineer-to-order, make-to-order, and assemble-to-order. Genius Manufacturing NG is designed to be easy to learn and use, is scalable, and highly cost effective. Your clients will gain quicker access to real-time information, improved delivery capability, cost savings, and improved customer satisfaction.

During this session, you will learn about how the Genius Manufacturing Solution supplements and integrates with Sage Simply Accounting. We will also cover our new Quick Start program, which includes Genius University online training sessions designed to get your clients up and running quickly with a reduced investment.

Day: Friday, September 23, 2011

Time: 10:15 a.m.–11:45 a.m.

Learning Track: Third Party Products

Conference Sessions

TPP6: Dealing with Manufacturers: A Primer. By MISys Manufacturing

Gauguin 1

Presenter: Charlie Kimbell, MISys Manufacturing

MISys Manufacturing software brings industrial-strength manufacturing capabilities to Sage Simply Accounting. Retrieve Sales Orders from Simply, stock raw materials and build products in MISys. Send finished goods back to Sage Simply Accounting. MISys includes Inventory control, advanced purchasing, advanced production, material requirements planning, shop floor control, bar-coding, serial/lot tracking, and much more. Lucrative two-tier partner program. Visit us at www.misysinc.com.

Day: Friday, September 23, 2011

Time: 12:00 p.m.–1:00 p.m.

Learning Track: Third Party Products

TPP7: Additional Recurring Revenue for Sage Simply Accounting Business Partners

Gauguin 1

Presenter: Hugh Johnson, SVP Sales, Sunico

The Sunico Platform provides a single and simple strategy for Sage Simply Accounting business partners to build a connected services business and additional recurring revenue streams. Uniquely, through a single connection to your client's Sage Simply Accounting software, you can deliver a growing range of connected services.

At this session, you will learn that without any new technical or programming skills, you can use the Sunico Platform to:

- Build new recurring revenues from your existing client base.
- Capture a greater share of your clients' IT spend.
- Keep competitors out of your client accounts.

Day: Saturday, September 24, 2011

Time: 10:00 a.m.–11:30 a.m.

Learning Track: Third Party Products

TPP8: Preparing Corporate Taxes Using Sage Simply Accounting with T2Canada.ca

Gauguin 1

Presenter: Jeff MacFarlane, C.A.

In this session, learn how easy it is to interact with a CA firm in the clouds to have your clients' corporate tax returns prepared. Jeff will show you how to upload your Sage Simply Accounting backup and how to retrieve all of the documents once the return is done. Learn about the advantages to both you and your clients of using a virtual CA office. This session is ideal for those who do not prepare corporate tax returns, but would like to be able to offer tax preparation service to their clients.

Day: Saturday, September 24, 2011

Time: 1:15 p.m.–2:15 p.m.

Learning Track: Third Party Products

TPP9: Direct Payments: Employee Direct Deposit, Customer Pre-Auth Debit, and Vendor Direct Deposit

Gauguin 1

Presenter: Paul Ellis, Sage

Conveniently make and receive electronic payments faster and more accurately. Sage Simply Accounting Direct Payments is a trusted solution for helping accounting teams increase productivity and improve overall business satisfaction. Find out how easy it is to setup payroll direct deposit, debit customer bank accounts, and pay vendors electronically at the click of a button.

Day: Saturday, September 24, 2011

Time: 2:30 p.m.–3:30 p.m.

Learning Track: Third Party Products