

WennSoft
SYNERGY2023

Time	Session	Level	Track
Monday, September 25			
8:30 - 9:45 a.m.	Empowering Growth: Navigating the Future with WennSoft Join WennSoft CEO, Joe Alvarez, VP of Product and Strategy, Rich Haus, and special guest speaker Terry Heley from Microsoft for updates on WennSoft's latest innovations and future developments.	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
10:00 - 10:45 a.m.	SmartList + SmartView (Hands-On*) (Repeated Tuesday 11:30 a.m.) This class is designed to teach power users and administrators how to create and modify different components within SmartList Builder. We'll start by demonstrating how end users can search for data, create favorites and reminders, modify columns, and use SmartView for use outside of GP for users that only need reporting data. We'll then explore the administrative side of creating SmartLists, including linking tables, key fields, calculated fields, and Go To's.	Intermediate	Operations, System Admin
10:00 - 10:45 a.m.	Job Cost Month End Processes When you're closing a fiscal period, following the right steps is critical. Learn all the necessary steps to help you accurately reconcile and report your financials. We'll examine revenue recognition processes when using POC, how to recognize job losses when they occur rather than when the job is closed, and more.	Beginner	Accounting
10:00 - 10:45 a.m.	The World of GP Reports In this session we will start to dive into the world of reports in GP. We will learn how to access them and add them to My Reports to make them readily available. We discover Report Writer in modifying canned GP reports. We will examine SmartLists and how to customize them to give you the information you need. We explore SSRS how they can create flexible reports and help automate the reporting process.	Beginner	Operations, System Admin
10:00 - 10:45 a.m.	MobileTech: Solution Overview Prior to today's integrated and mobile field service systems, field technicians working on site were disconnected from the home office. Now technicians can access the information they need from anywhere on any device. Learn how MobileTech enables technicians to track their appointments, quickly view data on customers and equipment, and easily complete the appointment in the field.	Beginner	Operations
10:00 - 10:45 a.m.	Improve Your Accounts Receivable Process for Microsoft Dynamics (Repeated Tuesday 11:30 a.m.) Are you spending too much time and effort collecting payments from your customers? Join Nodus in discovering how you can simplify your collection process for both you and your customers, securely process payments directly from Microsoft Dynamics, provide your customers the convenience of self-service payment options, and more!	Beginner, Intermediate	Accounting
10:00 - 10:45 a.m.	Feature Prioritization: MobileTech and MobileTech Inspections Our <i>MobileTech and MT Inspection</i> round table session is geared with you in mind. This is your opportunity to provide direct feedback to our product team around your business challenges, and how we can help you today, and long into the future.	Intermediate, Advanced	Accounting, Operations, System Admin

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Monday, September 25			
10:00 - 10:45 a.m.	<p>Deep Dive: wsTOOLS for Service and Job Cost If your company is looking to be more profitable and save your employees hours every month, stop by this session to learn about wsTOOLS. We'll dive deep into the most popular and powerful wsTOOLS for Wennsoft users, showing how they work and the value they can bring to your company and processes. We have a number of tools for SMS and JC that are "helpers," designed to help you FIX or FIND your data in the most efficient ways possible.</p> <p>We have listened to end users, and with over hundreds of implementations, these are the results</p> <ul style="list-style-type: none"> •Did you ever run an MCC invoice batch in error? You can't roll this back in GP...but you can reverse the unposted or posted invoices and get them back to an unvoiced state with MCVoidReopen. •How often do you need to change the division on a job once posting has already occurred? JCDivisionChange allow you to change the division on an active job regardless of the posting status and it handles all the correcting GL entries. •Everything is being sent electronically these days, and so should your invoices. QuickMail allows you to send individual invoices or send out groups at a time. <p>And that's just a sneak peek – we have dozens of tools to help you improve your business processes. Join us for this session to see them in action. We guarantee, if you're human, there's something here to make your work life easier.</p>	Intermediate	Accounting, Operations, System Admin
11:15 a.m. - 12:00 p.m.	<p>Woodford Advanced (Hands-On*) (Repeated Tuesday 2:30 p.m.) For users already comfortable with Woodford, this session will offer a deeper "hands-on" dive into functionalities provided by this useful tool. We'll walk through how to utilize the Admin Console for troubleshooting, enabling and using Server Auditing, and unraveling the secrets of utilizing the Sync Dashboard.</p>	Advanced	System Admin
11:15 a.m. - 12:00 p.m.	<p>What's New in Signature (Repeated Tuesday 9:30 a.m.) Learn about the latest and greatest enhancements that we've made to the Signature product family in the last 12 months as well as the Signature product roadmap for the upcoming year. This session will help you learn and understand how you can best use the Signature enhancements in your business.</p>	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
11:15 a.m. - 12:00 p.m.	<p>Connection Between MobileTech and Service Management Wondering exactly how MobileTech and Service Management work together? In this class, you'll learn the basics of where data can be found within Service Management and MobileTech, and how field-based activities affect both modules. We'll also review shared details, notes and attachments, and show you how to complete an appointment.</p>	Beginner	Accounting, Operations
11:15 a.m. - 12:00 p.m.	<p>MobileTech 8.6/9.0: Understanding Modifications via Offline HTML and Woodford Are you moving, or have you already moved, to MobileTech 8.6/9.0? Do you want to have a better understanding of how to use Offline HTML and Woodford? Join us to learn more about how you can identify which part of MobileTech is controlled by each tool. You'll also learn how to navigate and find the relevant forms, views and files in the latest update as well as how you can do basic modifications to your MobileTech system.</p>	Beginner, Intermediate	Operations, System Admin
11:15 a.m. - 12:00 p.m.	<p>Inventory Part 1 – Setup and Configuration In this session, we'll review various setup and configuration options within the Inventory module to gain efficiencies and optimize internal processes. We'll also talk about best practices for building the inventory item "Masterfile" and discuss various features within the GP Distribution series associated with inventory.</p>	Beginner	Accounting, Operations

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Monday, September 25			
11:15 a.m. - 12:00 p.m.	<p>Hackers and Phishers and Link Clickers, Oh My! You will walk away from this session with 5 tips and tricks to protect yourself, your family and your business from ransomware, phishing attacks and other Cyber Threats while you are online. We will discuss:</p> <ul style="list-style-type: none"> •why 8 character passwords won't protect you and what to do about it •why forcing password changes every XX days is a waste of time •how to protect your data on public hotspots •which mobile devices are secure...and which ones are NOT •how to spot a fake email (hint: its getting harder) •and much, much more 	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
11:15 a.m. - 12:00 p.m.	<p>Leading Through Change and Disruption (Repeated Tuesday 3:45 p.m.) We'll discuss embracing technological advancements, adjusting to industry changes, managing a multigenerational workforce, promoting a learning culture, nurturing team member well-being, and how we are collaborating and partnering in the industry. Seating is limited to 10 for this session as all members should be ready to contribute to the topics. Please plan to participate and share your thoughts on how your organization is currently addressing these areas.</p>	Advanced	Accounting, Operations, System Admin
1:15 - 2:00 p.m.	<p>Job Cost WIP Reconciliation (Hands-On*) (Repeated Tuesday 8:30 a.m.) In this session, we'll walk you through the processes that can be used to substantiate your WIP balances and show you tools that can help make reconciliation easier. We'll discuss how to identify, record and correct out of balance entries, and how to validate the subledger control account balances to ensure your P&L is correct.</p>	Intermediate	Accounting
1:15 - 2:00 p.m.	<p>Meet WennSoft Time (Repeated Tuesday 2:30 p.m.) Are you ready to meet our WennSoft Time solution that enhances the capabilities of your existing Signature solutions? In this session, we will highlight the power of WennSoft Time by utilizing your existing TimeTrack solution in an intuitive web browser design. Capture time entries for your office workers and non-MobileTech team to expedite time processing and payroll.</p>	Beginner, Intermediate, Advanced	Accounting, Operations
1:15 - 2:00 p.m.	<p>Disaster Recovery Planning This class will walk you through the three major steps involved in disaster recovery planning: plan creation, implementation and testing. We'll discuss the importance of starting the process by identifying areas of risk, as well as the pitfalls of partial implementation and failing to test the plan.</p>	Intermediate	System Admin
1:15 - 2:00 p.m.	<p>MobileTech Inspections Solution Overview Reducing human errors, improving productivity, cutting costs and reducing risk MobileTech Inspections enables antiquated paper forms to finally enter the modern era. Easily digitized, all forms become easy-to-complete Inspection templates so technicians can intuitively and efficiently capture necessary information from their mobile device – complete with offline functionality – with minimal training and disruption to productivity.</p>	Beginner	Operations
1:15 - 2:00 p.m.	<p>Inventory Part 2 – Transactions, Processes and Routines In part 2, we'll dive deeper into the Inventory module. We'll discuss the basics of physical inventories and stock counts, talk about ways to streamline inventory purchasing, and review processes like transactions, transfers and bills of materials.</p>	Intermediate	Accounting, Operations

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1:15 - 2:00 p.m.	Integrate WennSoft's Job and Service Data with Cavallo's Top Tier OMS WennSoft has the best Job Cost and Service Management tools for Microsoft Dynamics GP, and SalesPad brings unmatched customer and order management solutions. Seamlessly integrate them for an unparalleled combination that provides complete control of customers, sales documents, purchasing documents, and inventory transactions to streamline your Operations, top to bottom. Join us to learn more!	Intermediate	Accounting, Operations
2:15 - 3:00 p.m.	Managing Purchase Orders In this session we'll be looking at ways to manage PO's. We'll show how to handle them in GP, MobileTech, and Signature. We'll show ways of automating the processes using tools like Data Importer and SmartConnect along with document management integrations.	Intermediate	Operations, System Admin
2:15 - 3:00 p.m.	Woodford Basics The Woodford tool allows users to personalize MobileTech to make the solution work best for their business. We'll cover the basics of how to login and navigate the Woodford tool. We'll also discuss some common configurations and customizations.	Beginner	Operations, System Admin
2:15 - 3:00 p.m.	What's New in Microsoft Dynamics GP 18.5 & 18.6 (Repeated Tuesday 4:45 p.m.) With Microsoft's commitment to further enhance Dynamics GP, join Terry Heley from Microsoft to explore the new features and enhancements in the latest releases.	Beginner, Intermediate, Advanced	Accounting, System Admin
2:15 - 3:00 p.m.	CASE STUDY: How Perfection Group leverages Quadra quoting software to streamline its sales process Rob Winstel, Vice President of Operations at Perfection Group, joins EARTH Corporation to share an enlightening case study on how Perfection Group has successfully harnessed the power of Quadra Service Call Quoting software integrated with WennSoft to streamline and automate its sales process. This eye-opening session will highlight the implementation process and explore the efficiencies achieved through streamlining and automating the quoting process.	Beginner, Intermediate	Accounting, Operations, System Admin
2:15 - 3:00 p.m.	SmartList Builder for Everybody, Everywhere, All at Once You need to see your data where you work. But it's important to be ready for what's next. You can keep SmartList Builder functionality and report on data from any ERP, CRM, HelpDesk, or eCommerce platform you use. Join eOne Solutions to see how you can keep access to your data, no matter what solution you work on.	Beginner	Accounting
2:15 - 3:00 p.m.	WUUF Meeting WUUF is an independent WennSoft users group. We live by the motto of "Users Helping Users" to get and gain the most from your WennSoft solution. This group is a great place to ask questions and float ideas on how to make what we do, easier and faster. The group is made up of folks from about 120 different companies, most users are comptrollers, accountants, and SQL admins in charge of the day to day Operations. We are not an alternative to WennSoft or desktop support, but fill the area between. Come and see us and become a member at the annual meeting.	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
2:15 - 3:00 p.m.	Feature Prioritization: Job Cost, EMS, and TimeTrack Our <i>Job Cost</i> , <i>EMS</i> , and <i>TimeTrack</i> round table session is geared with you in mind. This is your opportunity to provide direct feedback to our product team around your business challenges, and how we can help you today, and long into the future.	Intermediate, Advanced	Accounting, Operations, System Admin

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Monday, September 25			
3:30 - 4:15 p.m.	Building MobileTech Inspection Forms (Hands-On*) (Repeated Tuesday 1:30 p.m.) Looking to switch from paper to digital forms? Come check out the MobileTech Inspection module. Here you will get a hands-on experience to see what it takes to create Inspection forms from existing paper forms and how the data flows from the Technician in the field to the back office in Signature.	Beginner, Intermediate	Operations, System Admin
3:30 - 4:15 p.m.	Invoicing Service Calls Service Management makes invoicing service calls easy. In this session, we'll show you all the areas where costs can be added to a call, explain the methods that can be used to modify billable amounts, and demonstrate how to invoice quoted service calls.	Beginner	Accounting, Operations
3:30 - 4:15 p.m.	Understanding MobileTech Errors Do you want to learn what the most common MobileTech errors really mean? Are you curious about how to uncover whether your problem is on your device, in your Woodford Project, in the middle-tier database, or in your GP/WennSoft data? This session will help you quickly identify both the source and likely resolutions of the most common MobileTech errors and in the process teach you a bit more about how MobileTech works in the background. This session will cover MobileTech 9, but contains information relevant to most recent versions of MobileTech.	Beginner, Intermediate	System Admin
3:30 - 4:15 p.m.	SSRS Advanced If you can already create reports using Report Builder, then this session is for you. Bring your report examples and we'll provide you with guidance for areas where you may be struggling. We'll also take a deeper look into how Report Builder can help you dynamically explore enterprise-level data by delivering interactive reports.	Advanced	System Admin
3:30 - 4:15 p.m.	Job Cost Best Practices + Closing Jobs Maximize your Job Cost solution. This session will cover job startup to completion and all things in between. You will discover importing and manually entering estimates and forecasts, the advantages of using the Advanced Subcontractor module, the difference between the unposted vs. uncommitted cost on the job status window, the advantages of job status window by period and finally, how to efficiently and effectively close jobs.	Beginner	Accounting, Operations
3:30 - 4:15 p.m.	Embedding GP Data in your CRM (Repeated Tuesday 2:30 p.m.) You need to see your data where you work. Empower your sales team, support staff, and IT to view all the data they need in one window. In this session, we will be showing how you can take your WennSoft SmartList data, and embed it in your CRM system with eOne's Reporting tool. Join eOne Solutions to see how your data can be easily displayed where you work, in whatever system you use.	Beginner	Accounting
3:30 - 4:15 p.m.	Networking: Dispatching in Schedule In this roundtable discussion, we'll be talking about the factors that should be considered when dispatching through Schedule, as well as the different methods of assigning techs and communicating with them. We'll also discuss how companies handle the call completion process. Join us to meet with your peers/colleagues and discuss Dispatching in Schedule!	Intermediate	System Admin
4:30 - 5:15 p.m.	Purchase Order Processing: Job Cost and Service Management (Hands-On*) (Repeated Tuesday 9:30 a.m.) This hands-on session will focus on how to do purchase order processing in both Job Cost and Service Management. You'll learn how to enter, correct, cancel or revise purchase orders, along with other valuable tips for making purchase order processing easier.	Intermediate	Accounting, Operations

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Monday, September 25			
4:30 - 5:15 p.m.	Worst Practices We all make mistakes. The best we can do is learn from them, right? Nope. Learning from the mistakes of others is cheaper. Join us as we share the worst practices and most costly mistakes that we've seen customers make related to their ERP systems. You might laugh, you might cry, but you might also learn how to avoid a similar fate.	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
4:30 - 5:15 p.m.	Schedule: Solution Overview Learn more about Schedule, the resource scheduling solution for Signature Service Management and Job Cost. Schedule provides the necessary features for resource coordinators to easily schedule technicians by day, week, or month. We'll review configuration options and settings, general use of the scheduling features and Customer Hub, reporting options, and map optimization.	Beginner	Operations
4:30 - 5:15 p.m.	3 Ways AI Enabled AP Automation Benefits Your Business In this presentation we'll explore how an artificial intelligence (AI) enabled AP Automation solution like MetaViewer can benefit businesses' accounts payable Operations. By providing intelligent functionality like Data Extraction, Touchless Invoice Processing, and Consistent Electronic Workflows, companies can reap many benefits. These include eliminating data entry for time-savings and error reduction, straight-through "touchless" processing for increased efficiency, standardized workflows to automate approvals and adhere to business rules, and much more.	Beginner, Intermediate	Accounting, Operations, System Admin
4:30 - 5:15 p.m.	Elevate Your Field Service Value with XOi - Fireside Chat Service leaders are combining field data with AI and machine learning tools to increase revenue, improve customer service, and accelerate innovation. Join this session to hear from WennSoft customers who are leveraging Xoi's integration to collect equipment insights, improve training strategies, and empower technicians of all experience levels.	Beginner, Intermediate, Advanced	Operations, System Admin
4:30 - 5:15 p.m.	Networking: MobileTech MobileTech is a valuable tool that has had wide acceptance over the years, but are you using it differently than other customers? Join the Networking: MobileTech session to share your thoughts/ideas/questions with other customers with similar needs.	Beginner, Intermediate, Advanced	Operations
4:30 - 5:15 p.m.	How Organizations Have Transformed Their Procurement and AP Processes Leveraging ECM Technology <ul style="list-style-type: none"> •Do you have blind spots in your vendor invoice approval process? •Do you need more control over your procurement approval process? •Have you considered the impact of the excessive cost associated with your manual data entry processes? If you answered yes to any of the above, join us for this interactive session where we introduce three organizations that have digitally transformed their Accounts Payable and Procurement processes leveraging the benefits of ECM technology including: <ul style="list-style-type: none"> •Reducing data entry workload by 90% •Streamlined implementation and user adoption •Slashed month-end check runs by 50% •Liberated resources to invest in higher priority activities •Freed ~500 sq. ft. of physical space 	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin

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Tuesday, September 26			
8:30 - 9:15 a.m.	<p>Job Cost WIP Reconciliation (Hands-On*) (Repeated Monday 1:15 p.m.)</p> <p>In this session, we'll walk you through the processes that can be used to substantiate your WIP balances and show you tools that can help make reconciliation easier. We'll discuss how to identify, record and correct out of balance entries, and how to validate the subledger control account balances to ensure your P&L is correct.</p>	Intermediate	Accounting
8:30 - 9:15 a.m.	<p>Using SmartList and Reminders to Optimize Workflow</p> <p>Unlock the power of SmartList Builder and Reminders to help streamline many back office workflow processes. In this session, you'll learn how to use these valuable tools to optimize your workflows by configuring SmartList Favorites and setting Reminders to manage completed service call auditing and invoicing.</p>	Intermediate	Operations
8:30 - 9:15 a.m.	<p>Best practices for building digital forms for use with MobileTech Inspections</p> <p>MobileTech Inspections is a very powerful tool for using digital forms to capture data in the field, and as we all know – with great power comes great responsibility. This session will focus on how to get the most out of MobileTech Inspections by using best practices as learned since its implementation.</p>	Intermediate, Advanced	Operations, System Admin
8:30 - 9:15 a.m.	<p>How to use AI and Bluetooth Low Energy technology to help workers be more efficient and effective</p> <p>As a trusted mobility provider, Resco's priority is to help our partners and clients keep pace with the evolving business climate. Mobile workers rely on their tools in challenging and often critical conditions. To help them take advantage of new technology, such as offline AI, Bluetooth Beacons, and workforce knowledge management, we've launched resco.Labs. Join us to learn more about these initiatives.</p>	Beginner, Intermediate, Advanced	Operations, System Admin
8:30 - 9:15 a.m.	<p>Automate AP and Boost Your WennSoft Capabilities</p> <p>Streamline your business processes, improve efficiencies, and reduce costs in accounts payable ASAP! Attend this session to learn how DocLink extends Wennsoft's Job Cost and Equipment Manager modules, helping to automate manual AP and job costing processes. DocLink's tight integration with WennSoft allows users to access and process electronic documents seamlessly from their WennSoft screens for greater productivity. Join us to hear how several WennSoft-DocLink users have achieved success by going paperless and touchless in AP.</p>	Beginner, Intermediate	Accounting, Operations, System Admin
8:30 - 9:15 a.m.	<p>Networking: Upgrading Your WennSoft Solution</p> <p>Learn how to plan for a successful solution upgrade by understanding the entire process. In this session, we'll review the new GP Modern Lifecycle and also discuss best practices to ensure your infrastructure is ready for a successful upgrade. Join us to meet with your peers/colleagues and discuss Upgrading Your WennSoft Solution!</p>	Intermediate	System Admin
9:30 - 10:15 a.m.	<p>Purchase Order Processing: Job Cost and Service Management (Hands-On*) (Repeated Monday 4:30 p.m.)</p> <p>This hands-on session will focus on how to do purchase order processing in both Job Cost and Service Management. You'll learn how to enter, correct, cancel or revise purchase orders, along with other valuable tips for making purchase order processing easier.</p>	Intermediate	Accounting, Operations
9:30 - 10:15 a.m.	<p>MobileTech Troubleshooting, Advanced</p> <p>Integration Errors? Sync Errors? This session will offer you a deep dive of how to troubleshoot your MobileTech solution like a Pro. We'll cover how to decipher Errors, where to find all the log files, and some troubleshooting tips from the experts. We'll cover everything you need to know to be your companies MobileTech Troubleshooting expert.</p>	Beginner, Intermediate	Operations

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9:30 - 10:15 a.m.	Schedule Advanced The session will offer an advanced dive into Schedule. We'll cover installation and upgrade best practices, customization guidelines, troubleshooting tips and tricks and even share some of the more popular Schedule customizations.	Advanced	System Admin
9:30 - 10:15 a.m.	What's New in Signature (Repeated Monday 11:15 a.m.) Learn about the latest and greatest enhancements that we've made to the Signature product family in the last 12 months as well as the Signature product roadmap for the upcoming year. This session will help you learn and understand how you can best use the Signature enhancements in your business.	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
9:30 - 10:15 a.m.	Create a WennSoft Portal Using Office 365 SharePoint Discover how Office 365 SharePoint and DynamicPoint can be used to provide your customers, vendors, or employees a WennSoft integrated portal. In this session we will cover DynamicPoint's Portal that offers 24-7 access to service management, job cost, and equipment management all from within Office 365 SharePoint. We will also cover increasing efficiency of customer service and field service departments, enabling the creation of service calls and call summary reports as well as how to leverage your existing investment while promoting a work-from-anywhere environment.	Beginner, Intermediate	Accounting, Operations
9:30 - 10:15 a.m.	Synergy Exclusive: Be the First to See the New wsTOOLS for Service and Job Cost Here at Implementation Specialists, we're committed to continuous innovation, and are excited to share, exclusively with Synergy attendees, the newest wsTOOLS for Service and Job Cost. Since last Synergy, we've been busy building new tools that deliver new and improved functionality for Signature SMS and JC users. Here's a sneak peek: •ServiceCallEquipment makes adding multiple pieces of equipment to a service call super easy! •ContractScheduling allows you to define a schedule for service call generation without the need for task schedules. •JCProjections allows you to project costs by cost code and period, then evaluate projected to actual costs on a monthly basis for 6-month periods—which is a huge benefit for PMs across your organization. And that's just the tip of the iceberg! Join our session to see how the newest wsTOOLS for Service and Job Cost can make your work-life a whole lot easier!	Beginner	Accounting, Operations, System Admin
11:30 a.m. - 12:15 p.m.	SmartList + SmartView (Hands-On*) (Repeated Monday 10:00 a.m.) This class is designed to teach power users and administrators how to create and modify different components within SmartList Builder. We'll start by demonstrating how end users can search for data, create favorites and reminders, modify columns, and use SmartView for use outside of GP for users that only need reporting data. We'll then explore the administrative side of creating SmartLists, including linking tables, key fields, calculated fields, and Go To's.	Intermediate	Operations, System Admin
11:30 a.m. - 12:15 p.m.	Discover Complete AP Automation from Purchase-to-Payment for Dynamics GP Users Create your own automated, paperless Accounts Payable (AP) process from purchase to payment with powerful, yet user-friendly Cloud-based AP automation. Join Yooz, a Microsoft Preferred Solution, for a discussion on how powerful Purchase-to-Pay (P2P) automation in conjunction with MS Dynamics GP can increase efficiency and month-end accuracy in an easy-to-use and seamless integration on a secure and accessible platform. Do more with complete, end-to-end AP automation for the construction industry to Dynamics GP and Yooz.	Beginner	Accounting

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Tuesday, September 26			
11:30 a.m. - 12:15 p.m.	Administering Security in the GP World When security settings are done right, users have access to exactly the areas of your system that they need to be in and are prohibited from areas that they don't. For some who need to be SOX complaint this is very important. We'll show you how to create users and provide them access to the appropriate companies, security roles and tasks. We demonstrate how to create security roles to better define roles. We will discuss using active directory user security to control access outside of GP and in SSRS to control who can access reports.	Advanced	System Admin
11:30 a.m. - 12:15 p.m.	Service Management: Solution Overview Designed with the service industry in mind, Service Management enables you to manage your service processes profitably and grow your business and technology needs. Learn how Service Management helps streamline your critical business Operations by improving communication with technicians in the field, creating and managing work orders, tracking expenses, and generating invoices all while reducing costs and improving customer satisfaction.	Beginner	Operations
11:30 a.m. - 12:15 p.m.	Improve Your Accounts Receivable Process for Microsoft Dynamics (Repeated Monday 10:00 a.m.) Are you spending too much time and effort collecting payments from your customers? Join Nodus in discovering how you can simplify your collection process for both you and your customers, securely process payments directly from Microsoft Dynamics, provide	Beginner, Intermediate	Accounting
11:30 a.m. - 12:15 p.m.	You CAN have it all! Keep your Dynamics GP and be in the CLOUD! Have you been told that moving to the cloud means leaving Dynamics GP behind? In this session, we will bust that myth and show you several options for taking the Dynamics GP system that you know and love to the cloud without disrupting your business or losing your data. If you have anxiety about what a move to the cloud might mean for your Accounting team, this is the session for you!	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
11:30 a.m. - 12:15 p.m.	Feature Prioritization: Service Management and Schedule Our <i>Service Management and Schedule</i> round table session is geared with you in mind. This is your opportunity to provide direct feedback to our product team around your business challenges, and how we can help you today, and long into the future.	Intermediate, Advanced	Accounting, Operations, System Admin
1:30 - 2:15 p.m.	Building MobileTech Inspection Forms (Hands-On*) (Repeated Monday 3:30 p.m.) Looking to switch from paper to digital forms? Come check out the MobileTech Inspection module. Here you will get a hands-on experience to see what it takes to create Inspection forms from existing paper forms and how the data flows from the Technician in the field to the back office in Signature.	Beginner, Intermediate	Operations, System Admin
1:30 - 2:15 p.m.	Payroll Tips & Tricks with Terry Heley from Microsoft Join Terry Heley from Microsoft to learn tips and tricks for payroll that will help make your payroll workflow effective and efficient.	Beginner, Intermediate, Advanced	Accounting
1:30 - 2:15 p.m.	Maintenance Contracts, Advanced Already pretty comfortable with Maintenance Contracts? Join us for this advanced session, where you'll learn how to take this solution even further. We'll show you how to automatically generate calls based on obligations, and how to better manage your contractual obligations by knowing when work is not performed as scheduled. We'll also discuss automatic billing, and how to track contract profitability.	Intermediate, Advanced	Operations
1:30 - 2:15 p.m.	Job Cost Solution Overview Job Cost enables users to track and manage every phase of a job from planning to completion. Learn how Job Cost can help you keep projects on-time, on-budget and on-task.	Beginner	Accounting, Operations

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1:30 - 2:15 p.m.	<p>Who the heck is DUG? Join us for our session and learn about the various free programming options DUG can provide for you! Dynamics User Group (DUG) is a user and partner <i>community</i>, independent from Microsoft, focused on personal and professional growth for Microsoft Dynamics GP, Dynamics 365 (BC, CE & FO), and Power Platform professionals. With Microsoft's recent announcements about the future of Dynamics GP, GP end users now more than ever, need a community to lean on for educational support. DUG provides a FREE membership to empower everyday users, administrators, developers, and partners with the tools and information required to excel in their professions through the various programming options we offer.</p>	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
1:30 - 2:15 p.m.	<p>Unleashing the Power of Quadra Quoting Software integrated with WennSoft Discover the latest features and watch how Quadra quoting software seamlessly integrates with WennSoft, enabling organizations to streamline, digitize, and automate their sales Operations. Learn how Quadra's powerful service call and maintenance contract quoting modules empower sales teams to quote faster and smarter, resulting in increased sales and accelerated business growth. Gain practical insights into how this software simplifies complex quoting tasks, enhances accuracy, and optimizes efficiency.</p>	Beginner, Intermediate	Accounting, Operations, System Admin
2:30 - 3:15 p.m.	<p>Woodford Advanced (Hands-On*) (Repeated Monday 11:15 a.m.) For users already comfortable with Woodford, this session will offer a deeper "hands-on" dive into functionalities provided by this useful tool. We'll walk through how to utilize the Admin Console for troubleshooting, enabling and using Server Auditing, and unraveling the secrets of utilizing the Sync Dashboard.</p>	Advanced	System Admin
2:30 - 3:15 p.m.	<p>Embedding GP Data in your CRM (Repeated Monday 3:30 p.m.) You need to see your data where you work. Empower your sales team, support staff, and IT to view all the data they need in one window. In this session, we will be showing how you can take your WennSoft SmartList data, and embed it in your CRM system with eOne's Reporting tool. Join eOne Solutions to see how your data can be easily displayed where you work, in whatever system you use.</p>	Beginner	Accounting
2:30 - 3:15 p.m.	<p>Meet WennSoft Time (Repeated Monday 1:15 p.m.) Are you ready to meet our WennSoft Time solution that enhances the capabilities of your existing Signature solutions? In this session, we will highlight the power of WennSoft Time by utilizing your existing TimeTrack solution in an intuitive web browser design. Capture time entries for your office workers and non-MobileTech team to expedite time processing and payroll.</p>	Beginner, Intermediate, Advanced	Accounting, Operations
2:30 - 3:15 p.m.	<p>Power BI Power BI allows for creative viewing of reports that can help visualize data in ways that draw attention to details that might not otherwise be obvious. Learn how to more easily slice and dice data into meaningful dashboards that will help you make business decisions faster and more accurately.</p>	Intermediate	Operations, System Admin
2:30 - 3:15 p.m.	<p>Common Extensions to Signature - Part 1 Signature Extensions are customizations that have already been developed, tested, and packaged for install on almost any Signature instance. They are supported by WennSoft's Technical Consulting team. In this session we will show you how to save money and time using the features of the most current versions of Data Importer, Contract Task Scheduling, MCC Call Creation, Create MC Invoices, and Signature API. For additional information, and for a complete list of the extensions and documentation, please contact your CSM.</p>	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin

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Time	Session	Level	Track
Tuesday, September 26			
2:30 - 3:15 p.m.	<p>Taking Control of Your Tools & Equipment Join us for a tour of PanatrackerST Tool and Equipment tracking solution. We will demonstrate key features such as check out/check in, maintenance, moves and transfers. PanatrackerST delivers visibility to the 'who-what-where' for your tool, equipment, asset, and inventory tracking. We invite you to bring us your tracking challenges.</p>	Beginner, Intermediate	Operations
3:45 - 4:30 p.m.	<p>Underutilized Microsoft Dynamics GP Features Microsoft Dynamics GP is filled with little-known features that have the potential to make a big impact on your processes. Join us to learn about several of them, including Modifier, Cash Flow Management, Safe Pay and EFT, and more.</p>	Intermediate	Accounting
3:45 - 4:30 p.m.	<p>How to Secure MobileTech -- MT Security Best Practices. Interested in making your MobileTech more secure? This session will cover dos, don'ts, and optional best practices on passwords, administrative access, and hardening your MobileTech site to protect against data interception or intrusion. This session will cover MobileTech 9, including new features only in that version, but contains information relevant to all supported versions of MobileTech.</p>	Beginner, Intermediate	System Admin
3:45 - 4:30 p.m.	<p>What's New in MobileTech and What's Coming in MobileTech 9.5 Aging like a fine wine, MobileTech just keeps getting better and better. Join us to learn about the newest modules delivered in MobileTech 9.5: Inspections and Integrations. Inspections allows your Technicians to complete predefined questionnaires in the field, connected or disconnected. Improvements included for the Quadra and XOi integrations.</p>	Beginner, Intermediate, Advanced	Operations
3:45 - 4:30 p.m.	<p>Common Extensions to Signature - Part 2 Signature Extensions are customizations that have already been developed, tested, and packaged for install on almost any Signature instance. They are supported by WennSoft's Technical Consulting team. In this session we will show you the time saving features of the most current versions of Equipment Combine/Renumber, Move Call Cost, Inventory Transfer, and Enhanced Scheduling. For additional information, and for a complete list of the extensions and documentation, please contact your CSM.</p>	Beginner, Intermediate, Advanced	Accounting, Operations, System Admin
3:45 - 4:30 p.m.	<p>Extend the Value of Your GP System to 2028 & Beyond with wsTOOLS With wsTOOLS, you can work smarter, not harder by simplifying common Dynamics GP processes and allowing your employees to do their work in a way that's best for your business. Like WennSoft, wsTOOLS by Implementation Specialists is an ISV who delivers functionality for Dynamics GP customers. Over the last year, we've created tools that enable the GP user to do more in their 8-hour days with less stress and fewer headaches. Like what, you ask? <ul style="list-style-type: none"> •POVendorChange - don't void the PO, just fix the vendor! •QuickCollect – You can have emails sent out automatically to customers who have overdue invoices. •Need your PMs and staff who work outside of GP to be able to initiate POs without calling the back office? QuickPO lets you create a PO in GP from an email and sends an update to the requestor. •Do you work in a multi-company environment and have to change company many times during the day? Check out SpeedSwitch Attend our session to learn about the most popular and powerful tools for Dynamics GP, and how they can make common tasks like data entry, search, and transaction posting easier!</p>	Beginner	Accounting, Operations, System Admin

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Time	Session	Level	Track
Tuesday, September 26			
3:45 - 4:30 p.m.	Leading Through Change and Disruption (Repeated Monday 11:15 a.m.) We'll discuss embracing technological advancements, adjusting to industry changes, managing a multigenerational workforce, promoting a learning culture, nurturing team member well-being, and how we are collaborating and partnering in the industry. Seating is limited to 10 for this session as all members should be ready to contribute to the topics. Please plan to participate and share your thoughts on how your organization is currently addressing these areas.	Advanced	Accounting, Operations, System Admin
3:45 - 4:30 p.m.	Networking: Equipment Management Equipment Management allows for detailed equipment tracking and scheduled maintenance based on meter reading and/or calendar. Let's discuss how this tool helps you you manage fleet maintenance and track vehicle expenses. Equipment Management also has a powerful Equipment Rental module that can be used for long and short term rentals. Join us to meet with your peers/colleagues and discuss Equipment Management!	Intermediate, Advanced	Operations
4:45 - 5:30 p.m.	SQL Optimization and Maintenance Join Paul Livengood as he discusses common SQL database issues and challenges that we have resolved for customers. Paul will also share the details of our SQL review process.	Intermediate	System Admin
4:45 - 5:30 p.m.	What's New in Microsoft Dynamics GP 18.5 & 18.6 (Repeated Monday 2:15 p.m.) With Microsoft's commitment to further enhance Dynamics GP, join Terry Heley from Microsoft to explore the new features and enhancements in the latest releases.	Beginner, Intermediate, Advanced	Accounting, System Admin
4:45 - 5:30 p.m.	The Original is Better than the SQL: No Code Integration for your Future Make your integrations easier, why write code to get data integrated, and need to maintain that code from release to release. Learn the power of SmartConnect to make your lives easier, your employees more efficient and happier. Happier employees leads to happier customers. Come learn how to make your customers happy by automating data integrations.	Intermediate	System Admin
4:45 - 5:30 p.m.	Avoiding Costly Accidents with the Power of Video Telematics Are you looking for ways you can improve driver safety and reduce the frequency and cost of accidents in your fleet? In this session, learn how GPS and dashcam technology with AI has advanced to allow real-time driver behavior monitoring that can reduce risk, improve productivity, and reduce the cost of commercial auto insurance premiums.	Beginner, Intermediate, Advanced	Operations