2019 Midwest Road Shows Schedule

Black = All Attendees

Blue = Customer Master

Red = Accounting Master

8:30 am	to	9:00 am	Registration & Welcome - Continental Breakfast provided
9:00 am	to	10:15 am	Maximizing Your Reports
10:15 am	to	10:30 am	Break
10:30 am	to	11:45 am	What's New in Customer Master 19.1
10:30 am	to	11:45 am	What's New in Accounting Master 19.1
11:45 am	to	1:00 pm	Lunch on your own – ALL attendees
1:00 pm	to	2:00 pm	Customer Master Year in Review
1:00 pm	to	2:00 pm	Accounting Master Year in Review
2:00 pm	to	3:00 pm	CM Service Order Templates & Customization
2:00 pm	to	3:00 pm	AM Inventory Best Practices
3:00 pm	to	3:15 pm	BREAK – ALL attendees
3:15 pm	to	4:15 pm	CM Sales Lead
3:15 pm	to	4:15 pm	AM Reports and Financial Reports Wizard

Session Descriptions

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Maximizing Your Reports: During this session, we'll provide tips to effectively use grid reports, reports auto generation, searching in reports, saving reports, filtering in grids, and more. We'll also review the newest features included in Web Reporting

What's New in Customer Master 19.1: More new and exciting enhancements are on their way! During this session, we'll discuss additional updates to Service Order Templates, NLAD, address history on moves, Disconnect Wizard default, E911 updates, Security Deposits, OCC updates with tax changes, ranges on Variable Rates, Directory and DA by Main Report Area, Report updates, and many additional features.

What's New in Accounting Master 19.1: Here's a sneak peek at what's coming this spring. Topics include Inventory Cycle Count, Item and Vendor Quote Electronic Documents, new Security Roles, Bank Reconciliation Undo, new POS reporting, updates to Financials, AR Invoice reel sales, TMS updates, and more.

Customer Master Year-in-Review: Many new and exciting enhancements were completed in 2018. We will review updates to Write-Offs, Service Order Templates, Equipment, Grid Reports, new options in Inquiry, OCC Thresholds, Activities (Classes, Stages, Tasks and Questions), and more.

Accounting Master Year-in-Review: This session will uncover the new enhancements in AM 18.1 and 18.2. Topics will include Purchase Order Import, Multiple Vendor Addresses, Recurring Journal Entries, ID Change Utility, Inventory Manual Transactions, Network Inventory Interface updates, Labor Entry Reallocation, Bank Transactions, and reports.

CM Service Order Templates & Customization: Use Service Order templates to pre-format information about accounts – making it easy to apply a specific profile to a new or existing account. Details such as USP codes, OCCs, report areas, tax areas, etc. can be pre-established in a template, and then with a simple click of a button, those details will be associated with the tier or even the entire account. We'll also take some time to review other SO options and preferences.

Accounting Master Inventory Best Practices: What's really going on behind the scenes in the inventory module? Sometimes it's helpful to understand things from a big picture view. This session will take a look at Inventory and all of the processes that make it come together successfully.

CM Sales Lead: More and more companies are finding it helpful to track potential customers and possible updates for existing customers. This session will navigate the challenge of providing quotes to potential customers as well as existing customers.

AM Reports & Financial Reports Wizard: During this session, we will review specifics about Accounting reports including auto-save of reports, the Financial Report Wizard, Employee Benefit Summary Report, and more.