

RG CONNECT 2019 SESSION DESCRIPTIONS

ALL = All Audiences, BI = Business Intelligence, GP = Microsoft Dynamics GP, SI = Sage Intacct

A Special Thank You to Our Platinum, Diamond and Stage Sponsors



BREAKFAST: 7:30 AM - 8:00 AM Sponsored by **eRequester**

Opening Session: 8:00 - 8:30 AM by *Denise Schillaci, Master of Ceremonies & Marty Schillaci, CEO*

Keynote: 8:30 - 9:15 AM by *Rich Reimer of Sage Intacct, "Finance 3.0 - Beyond Data Driven"*

MORNING SNACK: 9:15 AM Sponsored by **Nexonia**

SUPER SESSIONS: 9:30 - 11:00 AM

Solver BI360 – Cloud-based Reporting & Budgeting for Dynamics GP and Sage Intacct

Room 401 | Track: All | Presenters: Tracy Rich & Stephanie Gamber of Solver

BI360 Cloud enables faster and better decisions across your organization. It provides world-class reporting, budgeting, forecasting and analysis for Microsoft Dynamics GP and Sage Intacct. With BI360, users can easily create both financial and operational reports with multi-company consolidations, budget, forecast and visualize data with the BI360 integration to Power BI. BI360 Cloud provides a single reporting, budgeting, and data warehouse solution bringing all your data from virtually any data source providing easy access for executives, managers and end users. Learn about how you can make world-class decisions supported by a world-class corporate performance management solution—BI360 Cloud!

Reporting Options: How to Get Data out of Your Dynamics GP System

Room 402 | Track: GP | Presenters: Kevin Kooiker & Elizabeth Bender

A look at the differences in various reporting tools available in Dynamics GP, including Report Writer, Smartlists, Smartlist Designer/Builder, SmartView, Refreshable Excel Reports, Word Templates, and Navigation Lists.

Why 2019 is the Year of Cloud ERP

Room 403 | Track: GP | Presenters: Brady Curtis, Gary Volland and Riley Hering

Have you been thinking about moving to the cloud for your ERP solution? Join us for an interactive session as we discuss current industry trends, comparison of ERP cloud varieties, and a look towards the future.

Meet with TRG's Dynamics GP System Engineer and Account Manager - Bring Your Questions

Room 404-405 | Track: GP | Presenters: Kayla Schilling & Romy Andrews

Have questions about your Dynamics GP system? Want to discuss your future plans? Meet with your customer account manager or system engineer for 15 minutes.

New Features in Dynamics GP from 2015 to 2018 R2 You Should Be Using Today

Room 406 | Track: GP | Presenter: Tim Tobias

You have upgraded to the most recent version of Dynamics GP, but are you truly using all the new features? Attend this super session to discover the best features you and your team should start using to increase productivity and improve your processes.

Shape Your Future Now with Sage Intacct Platform Services

Room 407 | Track: SI | Presenter: Todd Bowlsby

Have you ever thought it would be nice to bring a process you're currently managing outside of Sage Intacct into your environment? Or that it would be nice to track financial information against a new Dimension? Or perhaps you've wanted to implement an approval workflow around a specific process. With Sage Intacct Platform Services, these things and more are possible! During this 90-minute Super Session, we'll explore the power of Platform Services while building an Application, Object, User-Defined Dimension, Menu system, and more. Strap in and prepare to shape your organization's future now!

Sage Intacct Dashboards for Accounting Workflows - Hands-on Workshop – Bring Your Laptop!

Room 408 | Track: SI | Presenter: Laura McDowell

Dashboards aren't just for executives! Learn from a Sage Intacct implementer about different ways that Dashboards and special customizations have been developed for accounting teams across many organizations to better support transaction processing, approval workflows, and reconciliations.

Sage Intacct Top Features from Past Releases & What's New Since RG Connect 2018

Room 409 | Track: SI | Presenters: Lauren Gilbert, Grace Wordsworth & Cole Shepard

The presentation will summarize the new features and updates that have been revealed in the last four Sage Intacct quarterly releases. This will include a demonstration or more in-depth explanation of some of the bigger features including brief introductions to the newly released Sage Intacct Budgeting and Planning, Interactive Custom Report Writer, General Ledger Dynamic Allocations, and Not-for-Profit Revenue Recognition modules.

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SPONSOR EXPO: 11:00 - NOON

Visit each booth to receive a stamp and enter to win \$150 Amazon Gift Card

LUNCH: NOON - 1:15 PM

Lunch served in the lobby and seating in room 404-405

BREAKOUT SESSIONS: 1:15 - 2:00 PM

Dynamics GP - Why Upgrade, Why Now?

Room 401 | Track: GP | Presenters: [Kayla Schilling](#) & [Romy Andrews](#)

Learn why now is the time to upgrade Dynamics GP, understand what is involved in the upgrade process and tips to make the upgrade easy for you and your team.

Tools for Your Dynamics GP System to Help You Increase Efficiency

Room 402 | Track: GP | Presenters: [Tim Tobias](#) & [Elizabeth Bender](#)

Do you want to gain back some time in your day? Increase efficiency in your Dynamics GP solution by using some of the most popular tools such as AP Connect, Copy/Paste, SmartLists, Professional Service Tools, and more.

Peering into the Future with Sage Intacct Budgeting and Planning

Room 403 | Track: All | Presenter: [Todd Bowsby](#)

Tired of managing your budget in Excel, but the power or cost of a Corporate Performance Management (CPM) solution is too much? During this session we'll examine Sage Intacct Budgeting and Planning: reviewing full and partial budget sharing, Sage Intacct integration, financial models with formulas, what-if scenarios, and forecasts and versions. Let's see what could be in store for you as we peer into the future.

What's Next for Dynamics GP

Room 406 | TRACK: GP | Presenter: [Marty Schillaci](#)

Want to know about Microsoft's road-map for Dynamics GP? Is GP going away? What is The Resource Group's plan for GP? What should I be planning for? If these questions are on your mind don't miss this session.

The Power of Sage Intacct Projects for Professional Service Organizations

Room 407 | TRACK: SI | Presenter: [Laura McDowell](#)

Are you a service-based or events-based organization? Ever wish you could see more financial and non-financial metrics about your company projects? Let's demystify the Project module with a review of key functionality and how professional service organizations can make the most of the native Sage Intacct system and beyond.

Getting to Know the New Interactive Custom Report Writer

Room 408 | TRACK: SI | Presenter: [Grace Wordsworth](#)

This session will show an overview of the functionality of the new Interactive Custom Report Writer. Get a walk-through and demonstration of the enhanced features, including formatting, drag and drop, and more.

Road-map of Sage Intacct

Room 409 | TRACK: SI | Presenter: [Rich Reimer of Sage Intacct](#)

This session will start with a brief review of recent releases and functionality and then focus mainly on upcoming functionality on the product road-map. This should be an informative session for both current and prospective Sage Intacct customers.

Wifi Sponsor: [ADP](#)

Water Bottle Sponsor: [Altec](#)

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SPONSORS BREAKOUT SESSIONS: 2:15 - 3:00 PM

Overcoming Buyer's Remorse with Technology Investments. How ADP has Changed its Implementation Methodology to Address the Utilization Gap for Accounting and HR Departments.

Room 401 | Track: All | **Presenter: James Taylor of ADP**

Low client satisfaction with existing HCM solutions is an industry-wide problem and ADP wanted to know why. We surveyed mid-size businesses, both ADP users and non-users, and various consulting experts on why so many technology adoptions fail to fulfill their potential. In our breakout session we will cover the four main problems we found and how ADP addresses them with the new ADP Advantage Program.

Now Users Have a Way to Pay Vendors - Regardless of Payment Type, Directly from Microsoft Dynamics GP

Room 402 | Track: GP | **Presenters: Jay Manley & David Adams of Mekorma**

You won't want to miss this information-packed session about Mekorma Enhanced Electronic Payments. A great new way to make AP payments via ACH, EFT, virtual cards and paper checks - with virtually no change to the way you pay from Dynamics GP. Join us as we discuss how to eliminate the cost and hassle of paying vendors and reduce your exposure to payment fraud, heighten your visibility into payables and increase overall financial control.

BI360 and Streamlining the Budget Process

Room 403 | Track: All | **Presenters: Tracy Rich & Stephanie Gamber of Solver**

BI360 automates and streamlines your budget process with advanced work-flow capabilities for organizations with many users involved in the budget process. Learn how BI360 can shave time and make budgeting and forecasting for your organization a much smoother and easier process in this 45 minute BI360 session.

Learn How To Close Faster & More Accurately, Be Audit Ready at All Times & Automate Tedious Reconciliations with the New AI powered FloQast Matching Engine

Room 404-405 | Track: All | **Presenters: Thomas Grigely & Taylor Humphrey of FloQast**

After working with thousands of accounting teams, we understand the month-end close process for most companies is a manual, time consuming and tedious process. During this session we'll review some recent FloQast client success stories, dive into common problems we help accounting teams solve (From CFO - Staff Accountant) and show you how FloQast helps accounting teams reduce their close on average by 33% while increasing controls and ensuring completeness.

Sage Intacct Driving Business Performance

Room 406 | Track: All | **Presenters: Bryan Parks & Lisa White of Sage Intacct**

Sage Intacct is 100% invested in meeting the needs of financial professionals, 100% focused on customer success, and 100% committed to the cloud. That's who we are, and always will be. Customers ranging from startups to public companies rely on Sage Intacct's best-in-class cloud ERP software to deliver the efficiencies and insights that keep them on the fast track of growth, from their first million to their first billion.

The Easiest Way to Spend Less: Intro to Cloud Spend Management

Room 407 | Track: All | **Presenter: Eric Osbourne of eRequester**

Efficiency that translates to saved time and money. Intuitive software that's easy-to-use. Visibility with on-demand reporting in real-time. Get all the cost containment benefits of spend management without the additional cost of IT resources. Every dollar saved adds to the rapid return on your spend management investment.

Customer Success Story: Spotlight on The Seattle Times

Room 408 | Track: All | **Presenter: Byron Wowchik of Nexonia**

Please join us for a 45 min conversation with Nathan Shimizu, Accountant at The Seattle Times, as we discuss how The Seattle Times chose Nexonia as their Expense provider. We'll cover how The Seattle Times was operating before automating their expense process (hint - lots of paper and file folders!), the efficiency gains they're experiencing now by using Nexonia, plus, how Nexonia's integration with GP Dynamics has streamlined backend work for their accounting team.

AP Automation & Beyond: Gain Control of Your Data with DocLink

Room 409 | Track: All | **Presenter: Scott Hall of Altec**

Are you a CFO, Accounting Manager, AP Clerk, HR Manager or IT? What would it mean if you could spend less time touching documents, yet gain improved efficiency, visibility and control? Learn how DocLink, the document management and workflow solution, allows you to automate any document-intensive process and go paperless in AP, AR, Sales Order, Contracts, HR or any

GENERAL SESSIONS: 3:15 - 4:00 PM

Microsoft Dynamics GP Tips and Tricks

Rooms 406 | TRACK: GP | **Presenter: Sheri Carney**

Don't miss out on the ever popular Tips and Tricks session with Customer Care Specialist, Sheri Carney!

Sage Intacct Tips and Tricks

Room 407 | TRACK: SI | **Presenters: Lauren Gilbert & Cole Shepard**

Be more efficient and effective in Sage Intacct by learning from our experienced Sage Intacct consultants. Come join us to gain tools that you can use to develop more streamlined processes!

4:15 - 4:30 PM in Room 404-405: CLOSING & PRIZE DRAWING

4:30 - 5:30 PM - Happy Hour Sponsored by Mekorma