



P21WWUG CONNECT 2016 SESSION DESCRIPTIONS -DRAFT-

MONDAY SEPTEMBER 26TH

8:00 am - 9:00 am

Label Options in P21

Presented by: Michael Dean

This class will cover different options of how to print labels from p21. This will include using crystal forms built in to the system and Seagull Scientific's Bartender software.

Implementing a Quality System for Certification – description pending

Excel Intermediate - Using Excel to Analyze P21 Data

Presented by: Barry Hallman

For the users that have mastered the basic skills of Excel, this session will demonstrate some of the more advanced and lesser known functions that add additional analytic power to Excel. We will look at nested functions, lookup tables, a better way of totaling and subtotaling (not using the sum() function), using radio buttons, and how to create custom views of the data. The session will be based on a real-life example for presenting financial data.

Introducing Epicor Commerce Connect (ECC) E-Commerce Solution

Every distributor has a business need to connect and transaction with their customers digitally. Whether to enable their B2B customers to use preferred pricing and purchasing terms or enable their B2C customer to directly purchase - eCommerce is the key solution that enables these scenarios. Experience the Epicor Advantage, by leveraging all the information in your Prophet 21 to drive your eCommerce front end with Epicor Commerce Connect (ECC).

Motivate & Retain Top Talent Engage Your Team

Presented by: Sandler Training

This session will discuss:

- Mechanics though which engagement is increased & translated into profits
- Which aspects of work are most powerful to increase individual productivity?



- Harness the drive and spirit of your employee
- Be more successful by focusing on optimizing each employee

Modifying Crystal Forms

Presented by: Adam Fink

In this class we will go over how to modify forms such as the Order Acknowledgement and Pick Ticket. Modifying the forms can consist of moving fields around, adding barcodes as well as a number of other changes.

Tools for Branch Ops: Transfer Best Practices

Presented by: Jimmy Cobb

Are you doing purchasing for multiple branches? This class will explore the intricacies involved with multiple locations. From basic transfers to sourcing sales from another location to replenishing stock with Transfer Requirement Generations (TORG).

Go Paperless with DocLink for Prophet 21

Presented by: Altec

Taking the first step toward fixing outdated business practices can be daunting but your team needs it to creatively and easily expedite processes, route documents quickly, create alerts, customize forms, automate workflows, and access files from any device no matter whether they are on the shop floor or out in the field. Let Altec show you how with DocLink, document management and workflow solution for Prophet 21. Join us to identify where you need efficiency boosts and how to go paperless with any document, any process, anywhere!

9:10 am - 10:10 am

P21 Cash Collections

Presented by: Melody Lawrence

This session is suited for new to intermediate users, and will cover:

- How to get Cash Collection Calls into the system
 - How to determine which customers need to be contacted
 - How to start a cash collection call record for the customer
- Working the calls that are already in the system
 - How to know which calls need follow-up.
 - How to record the follow-up



Questioning and Listening Skills - Part 1

Presented by: Texas A&M

This interactive session will introduce participants to techniques for enhancing their questioning and listening skills. At the completion of this session participants will have a better understanding of how engage other people in conversations for the purpose of gathering information. In addition to learning how to properly structure questions, participants will be introduced to a questioning process that defines three categories of questions and the order in which they should be asked to most effectively engage others in conversation.

Crystal Reports Beginner

Presented by: Barry Hallman

Prophet21 depends very heavily on the use of Crystal Reports, and having the ability to create and modify these reports is becoming a necessity. Tailored to the needs of users brand new to Crystal Reports, this session will start at the very beginning of creating reports. The goals will be to understand the various sections of a report, how to connect the report to a database, how to add fields to the report, and how to create groups and subtotals. We will also touch on how to format the data.

Beginning Dynachange Rules (Visual Basic)

Presented by: Michael Dean

This Class will cover the basics of what Dynachange Rules are and how to get started. During this class we will go through start to finish how to build a simple rule and get it installed in P21

MITS Introduces: Role-Based Analytics for P21 Users

Presented by: Gary Owen, President, MITS

More than just an add-on reporting package, MITS for P21 is a powerful business intelligence and analytics solution designed specifically for P21. During this info-rich session, we'll introduce you to some of the powerful new role-based content we've rolled out for P21 users, including a daily scorecard for sales reps and customers, a product scorecard, and a comprehensive new dashboard that helps executives keep their pulse on how the business is tracking to key goals.

Infrastructure for P21 Technology Professionals

Presented by: Heraflux Technologies

Have you ever had that sinking feeling right after you signed a PO for a huge hardware purchase for an upcoming infrastructure upgrade because you're not sure if it's the right stuff? Never fear! This introductory session will take you through the infrastructure and application stack layers, such as storage, virtualization, networking and interconnects, physical servers,



operating systems, database platforms, and application servers. Specific tips about selecting and managing these components will be shared in this highly interactive session.

Policies and procedures that lead to Effective Inventory Management

Presented by: Jon Schreibfeder

Prophet 21 is good software. But it cannot lead a distributor to success unless it is combined with best practice policies and procedures. In this session we will look at how to make sure your organized in such a way to maximize the productivity and profitability of your investment in stock inventory.

From Cost Center to Profit Center: A “Game Changing” Transformation Plan for One Company’s Distribution Warehouse Operations

Presented by: Howard Coleman

Howard Coleman of MCA Associates and Adam Hart of Tanner Bolt & Nut will present a business case study describing Tanner’s plan to transform its warehousing & distribution operations from a cost center - to a profit center.

Adam Hart will discuss the factors that drove Tanner Nut & Bolt to bring their distribution operations into the financial arena – focusing on the financial impetus for change. This will include:

- A brief history of Tanner’s growth and operational requirements that drove “the plan”
- The importance of identifying the “wastes” that were occurring in the warehouse
- Why product “flow”, thru the warehouse, was identified as a critical success factor
- The need for more focused and visible performance metrics

Howard Coleman will discuss:

- Identifying and eliminating the “10 Wastes”
- The 4 planning components, that if followed, will guide success in distribution warehouse performance improvement. How they comprise a strategy.
- The typical barriers encountered; to think about or rethink
- Some great places to start distribution warehouse “continuous improvement” initiatives



10:25 am - 11:25 am

Calculating Commissions using P21

Presented by: Carolyn Hunt

If you pay commissions to your sales force, this session will show you all the possibilities available to let Prophet 21 help with commission calculations. We will review setting up commission rules, split commissions, salesrep commission setup and reporting.

Questioning and Listening Skills - Part 2

Presented by: Texas A&M

During this session, participants will have an opportunity to put into practice the techniques they learned in session one. They will be exposed to practical and relevant applications for the questioning and listening techniques and instructed as to how to develop a Customer Needs Analysis. At the completion of this session participants will have begun to develop skills based on the techniques that they have learned and have a better understanding of how to employ these techniques during their interaction with others.

Returns Best Practices

Presented by: Adam Fink

RMA's and Inventory Returns should follow a standard procedure. How well are you managing yours? Do you have a documented process and do you monitor people's adherence? A sample process will be reviewed. If you collect your data wisely, you might also reduce the number of future returns using Pareto Charting. You will also see some extra steps you can take to eliminate problems and manage the backlog of open transactions. Users will also be able to share their own approaches and recommend their own best practices.

Reporting vs. BI vs Analytics: Compare and Contrast

Presented by: Rick Sundhal

The hype over the latest buzzwords have made analysis technology confusing. There is actually now a discipline called "data science" that focuses on exploiting all the data available to users. Since P21 is SQL Server based, there are a lot of alternatives to "consuming" the data. This session will compare and contrast the differences in "big data" technology for P21 users.



Yes, you can have the right inventory at the right place at the right time!

Presented by: Absolute Value

If you're struggling with your inventory management needs, this session is for you. Learn more about how you can optimize your most significant business asset – your inventory. See how the Absolute Value's Demand Planning and Replenishment solution extends your P21 system by placing all the data you need to make inventory-related decisions at your fingertips. We'll show you how our system tightly integrates forecasting and replenishment capabilities, enables you to manage your inventory investment across all locations, automatically manages sporadic stock in ways *you* define, proactively solves stock outs, and collaborates with customers and vendors. And we'll have some P21 customer stories to share as well. With Absolute Value, you absolutely can have the right inventory at the right place at the right time, while increasing customer service levels, and freeing up cash!

Virtualizing your IT Environment

Presented by: Pete Monfiletto

A basic course discussing virtualization benefits using VMware as a virtualization platform. We will discuss physical and virtual servers, different types of storage and tips and tricks including special settings for P21

B2BSeller - Before You Leave

Presented by: Paul Ahlers & Tyler Schroeder

A general discussion on whether or not it's time to leave to B2BSeller. Sharing our experience working with B2BSeller in the last 5 years and demonstrating its full capabilities.

Leadership: Managing Multiple Generations

Presented by: Sandler Training

This session will discuss:

- How to tailor your management “mode” for each generation
- Tips for generations - motivating, communicating, and preferred approach to feedback



11:35 am - 12:35 pm

B2BSeller Advanced Customization with jQuery

Presented by: Paul Ahlers

An advanced technical course on how to manipulate pages that are not available as HTML Templates. Will demo adding user defined fields to the shopping cart page to group items by free shipping eligibility.

Beginning Dynachange Rules (C#)

Presented by: Kent Vela

Geared towards new users. We will start with setting up Dynachange rules (system and user settings). We will then design a simple rule from scratch followed by showing how to apply rules to fields as converters and validators along with “on save”, “on open” rules, User Defined Menu rules, and event driven rules. Finally, we will go into managing rules via the Rule Organizer. Advanced class next day will continue from there with Cascading, Multi-line, and Datastream rules.

Vendor Presentation – Phocas – session description pending

Amazon Selling Experience

Presented by: JR Tapper

Target audience: Business Owners, Managers, Sales, IT, & Operations

This session will discuss - how we got started selling on Amazon, the unique vocabulary of selling on Amazon, what companies need to do to sell on Amazon, our integration between Prophet21 and Amazon, managing ongoing Amazon sales, what we have learned about selling on Amazon. Time will be reserved for Q&A.

When to Utilize Hub and Spoke Replenishment

Presented by: Jon Schreibfeder

Every multi-branch distributor is faced with the question of whether it is better to replenish the stock of an item in a branch directly from a vendor or from another warehouse. In this session we will look at various scenarios and the benefits and challenges of replenishing inventory from a central warehouse. You will develop guidelines to implement a successful integrated replenishment program for your organization.



Optimizing Your Month End Closing

Presented by: Stacy Cline

This session will focus on developing efficiencies to reduce the month end close cycle while improving the quality of data. Geared towards bookkeepers, accountants, financial analysts and controllers. Focus will be on establishing a month end closing checklist, repetitive journal entry templates, journal entry imports, account reconciliations and exporting relevant financial data out of P21. Once implemented, companies will see improvement in financial integrity of data and be able to more effectively manage, identify and optimize financial decisions.

12:35 pm - 1:35 pm

Analyzing Inventory Turns: Turn and Earn Report

Presented by: Neil Van Walbeck

T&E- Inventory Turns is one of the key metrics that companies use to manage their inventory. Inventory Turns or Inventory Turnover is the number of times that inventory cycles or turns over per year.

Resources for Learning When You're New to P21

Presented by: Robert Weaver

New to SQL, Excel, Azure, Windows Server, C#? In this session we will share resources and strategies to get you productive fast when you are new to Prophet 21 and Information Technology.

Assemblies, Production Orders, Basics of Light Manufacturing

Presented by: Carolyn Hunt

This session will cover setting up assembly items for use as kits or production orders. We'll review the best practices for using each type of assembly, including the production order process from start to finish. Basics of light manufacturing will also be covered for tracking labor and work in progress.

Using Veeam to Back Up your Virtual Servers

Presented by: Pete Monfiletto

An introductory course to VEEAM back software. We will describe what it is, what it can do and how it can benefit your organization.



Mobilize Your Sales and Service Techs with Rubber Tree

Join us for an informative session about our sales force mobilization program trusted by over 160 companies. We will discuss how your sales people can get P21 ERP data right on their phone, including a bi-directional P21 CRM integration. We will also be discussing our service tech module which allows your service technicians to update service order forms, capture the customers signature and automatically deliver the information to the customer and the back office.

B2BSeller Mobile Friendly Responsive Design

Presented by: Tyler Schroeder

A comparison of the B2B Seller Mobile add-on vs turning your existing platform into a mobile friendly solution. Will cover live demos of each product along with their respective capabilities and restrictions.

1:45 pm - 3:15 pm

12.16/12.17 New Features

Presented by: Michael Dean

This class will cover many of the new features of P21

Beginning SQL Query Writing

Presented by: Barry Hallman

The ability to write basic SQL queries enables a company to access a huge wealth of information from their database. We will start in this class with an understanding of what a SQL database is, and how we can select data from it. Special emphasis will be placed on gaining a working understanding on how to join the data of multiple tables of data together in order to broaden the available results. The class will be heavily weighted to demonstration and answering questions.

Getting Started with Advanced Demand Forecasting

Presented by: Neil Van Walbeck

In this class you will discuss why managing your inventory is so important. You will learn how to improve inventory accuracy, and learn how to manage inventory, not just buy. Tools and processes will be discussed that will encourage you to change your practices and empower you to make improvements to your business.



Competitive Negotiation Seminar

Presented by: Strategic Pricing Associates

Learn how to negotiate anything better with this entertaining session designed to give you some practical strategies you can use immediately as well as introducing you to concepts for further exploration. Whether you are on the sell-side or the buy-side, this session will improve your odds of getting what you want during your real life negotiations.

Reality Check: How Prepared Is Your P21™ for Disaster?

Presented by: Echopath LLC

Your business relies on Prophet 21® nearly every moment of every day. What would happen if you couldn't access it? In this must-see session, presenters with deep real-world experience with P21 examine the essential questions your organization can use to evaluate its preparedness for worst-case scenarios. Discover how to:

- Assess the resiliency of your Prophet 21 platform
- Identify potential gaps in your data backup and disaster recovery plans
- Implement new strategies for protecting this critical IT system

SSRS Bootcamp: Going from nothing to your first report

Presented by: Landon Edwards

Learn how to install SSRS, Microsoft's free BI tool, and get up and running! See exactly how to install the software, configure your first project, and how to deploy your first report.

I'm Live; Now What?

Presented by: Carolyn Hunt

If you are new to Prophet 21 or even if you have been on the system for a long time, we often do not take advantage of some very helpful features in the system. This session covers frequently asked questions with solutions that help save time and money.

Pricing Service

Presented by: Jimmy Cobb

This powerful tool helps update many aspects of your item ID records. Learn how to create a quick template to update sales pricing, cost, and many other fields in Item Maintenance. We'll also show how to setup new items and fill in all required fields from one import.

3:30 pm - 4:30 pm

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Best Practices for Processing Accounts Payable Using Credit Cards

Presented by: Melissa Selig

How many of you hate it when an executive or purchasing department pays something with a credit card and you have to process it? Or you go to look up a vendor in Prophet 21 that you know you have done business with and can't find any information only to find out the vendor was paid by Amex and the history is under that vendor or the employee who paid with the credit card? This session will demonstrate how one company turned the hassle of processing credit card payments into \$\$\$ to the bottom line using baseline functionality within Prophet 21. They now pay for 25-30% of all purchases via purchasing (credit) card while still maintaining accurate audit trails and controls, processing efficiencies, and preservation of vendor/supplier history.

Order Entry Tips and Tricks

Presented by: Pauline Cote

In this Order Entry – Tips & Tricks class, you will learn the quickest way to find your customers and enter your orders. This is geared for the new user but even the advanced user may pick up some helpful tips. We will focus on the different fields and how they will affect your order. You will also see how we have Dynachanged some of our screens to speed up the order entry process.

Objective SQL Server and Infrastructure Performance

Presented by: Heraflux Technologies

"P21 is slow! FIX IT!" is not a fun way to walk into the office on a Monday morning. However, putting objective metrics to the subjectivity of 'slow' is as much a science as it is art. Performance engineering takes effort well before an issue arises. Collecting the right metrics, trending and comparing against an established baseline, and identifying bottlenecks are all part of the performance process. This interactive session will help the administrators fine-tune their performance tuning approach so that the foundation for long-term proactive performance review is in place. The administrator can then shift the job responsibilities from a reactive response to a more predictive and proactive role.

Shipping Made Easy with Epicor Manifest

Epicor Manifest offers a modern shipping software with a new and fresh User Experience, easy to maintain for IT. Epicor Manifest empowers users to streamline their shipping process, reducing errors and automatically printing labels and additional paperwork. Join our team for a comprehensive demonstration on how we can simplify your shipping process.



Importing Goods Using P21

Presented by: Rob Germundson

The purpose of the presentation is to provide a general overview of the import process. Establishing supply chains for importing foreign goods involves licensing, regulatory compliance, and selection of freight forwarders. Prophet 21 provides solutions to create purchase orders, handle drop shipments, use landed cost functionality for full costing, and calculation of lead times for ordering based on built-in forecasting features. Done successfully, companies can drive more profit to the bottom line through direct importing.

Introduction to B2BSeller

Presented by: Paul Ahlers

A basic overview of how to properly manage your B2BSeller website. Session will include feature overviews, administration screens, properly setting up items, categories, content and more.

Saving money with UPS and FedEx: Negotiation Strategies

Presented by: Landon Edwards

Ever wonder what kinds of charges you can get discounts on? Not sure if you are saving as much on your freight spend as you should be? Join in for a discussion about how to work with carriers to get the best contract possible, and learn about other money saving options.

4:30 pm - 5:15 pm

Network by Industry

- Tile
- Fluid Power
- Fastener
- Medical Supply
- Electrical
- Jan-San
- HVAC
- Petroleum
- Plumbing
- Industrial/General



TUESDAY SEPTEMBER 27TH

8:30 am - 9:30 am

P21 Data Extraction and Interpretation

Presented by: Stacy Cline

This session will focus on removing the barrier of silos for financial data in Prophet 21. Geared towards the financial community not utilizing SQL or Crystal Reports as their primary source of data. Learn to export, create unique identifiers and connect different data sources to give the data meaning and analyze the data in aggregate. Once implemented, companies will be able to develop effective metrics and report financial results in a clear, concise manner.

What to do when you are forced to reduce your inventory investment

Presented by: Jon Schreiberfeder

What if you can't afford to buy all of the stock suggested on your PORG reports? How can you successfully reduce your investment in stock inventory without harming customer service? In this session we will explore how you can implement a successful inventory reduction program to get you through rough economic times and position your company for future success.

Infrastructure and Virtualization Health Checks

Presented by: Heraflux Technologies

P21 performance is paramount to each and every one of us, but how far can you go with that seemingly impossible company expectation that you can improve performance? What if your infrastructure "sports car" has a flat tire? This highly technical session will help you lead an investigation into the performance of each layer of the stack underneath P21. You will gain the understanding of the importance of each system stack layer to determine how well P21 is running, how much capacity you have left for improved performance, and your business can plan for when the next application upgrade is needed.

B2BSeller HTML Templates & Styles

Presented by: Tyler Schroeder

A technical demonstration of how hosted and non-hosted customers are able to utilize HTML Templates and CSS stylesheets to completely customize a large number of modules on B2BSeller. Will demo updating an item search results and item detail page.

Tips to Eliminate Hidden Shipping Costs

Presented by: ADSI

What new order fulfillment and customer delivery challenges are today's shippers facing? With labor, freight and shipping rules becoming more complex, many leading shippers are analyzing



their order packing workflow and shipment rating routines in order to eliminate hidden shipping costs. They're finding that common errors related to incorrect dimensional measurements, incorrect shipping addresses and missing shipping reference numbers can quickly amount to thousands of dollars in unexpected charges. In this session, you will learn how to identify and eliminate the risk of these extra costs. Also, to learn more, please stop by ADSI's booth 100.

Hidden Gems of P21 & Epicor Business Consulting

Business Process Reviews of companies that have been on P21 for a few years have uncovered some hidden gems in P21. The goal of the session is to discuss some of the lesser known (or used) P21 functionalities and how Epicor Consulting Services can assist customers to better utilize the software.

How to find the Hidden Fees on your CC Processing Statement

Presented by: Robert Day

Robert Day, Industry Expert and Managing Partner of weAudit.com, will take you behind the scenes and expose the inside, trade secrets that processors use to HIDE their fees in plain sight. This is a must-see for anyone looking to cut operating costs.

- Top 2 mistakes merchants make
- Top 10 billing tricks exposed
- Top 5 questions your processor hopes you never ask
- Chip & Pin - Do you really need it?

Timeclock Software & Integration with P21 - Roundtable

Presented by: Michael Dean

This class will be a round table discussion of what people have done to integrate outside software into P21 for Time Management. One program discussed will be TimeClock Plus

9:45 am - 11:15 am

P21 Form Modifications and Using Custom Data Streams

Presented by: Adam Fink

The ability to add fields to a Crystal Form is a popular topic on the P21WWUG Forum. This session will show you how to use the Custom DataStream functionality. Included in this session, you will see new fields added to the DataStream. You will learn how to setup Custom SQL Views to simplify the Join logic. You will see how to modify the XSD file to include the newly added fields. Lastly, you will see the modification of the Crystal Form adding the newly



linked fields. Completing the class, the new Form will be executed from P21 with the changes completed. Troubleshooting will also be reviewed.

1001 P21 Features You May Have Missed

Presented by: Michael Dean

This class will cover features of P21 that have been around and might have been overlooked or forgotten.

Leadership - Effective Coaching

Presented by: Sandler Training

In this session, we will:

- Examine the 2 levels of coaching
- Learn a 3 step process for effective coaching
- Discuss how coaching should be a collaborative effort, and
- How coaches facilitate continuous growth

Centralized Purchasing – PORG Set up and Methods

Presented by: Todd Taverner

Want to know more about PORG Criteria and Application for Location Purchasing and Group Purchasing?

This session will cover a number of ways the presenter utilizes PORG to handle Stock and Special Order purchases for over twenty sales locations and their Central Distribution Center. This will cover both Centralized and Decentralized PORG concepts, Surplus Inventory Movement through PORG, Purchasing Group Set up, Scheduling and workload balancing.

- This class would appeal to users wishing to learn more about how to transition to Central Purchasing, those managing multiple inventory locations or looking for a group where they can share questions about Purchasing Processes with their peers.
- The class will not cover Item Classifications or Replenishment Methods.
- The class will be introductory to moderate level.



Vendor Presentation - Inmediate Inc.

"Inmediate Users share real world success from reporting/analytics related to Sales, Servicing, Operations, Purchasing, and Inventory. We are also introducing Microsoft's **PowerBI** for personalized dashboards/analytics"

Guest speakers include: **Pauline Cote** - *Director Operations at Butler Bros.* on Operations/Inventory; **Tina Owens** - *Database Admin at Air Hydro Power* on Purchasing/Expediting; **Rob Agnetti** - *Director of Business Systems at Scales Industrial* on Servicing; **Tom Malone** - *IT Director at M. E. Campbell* on Sales with ExecuKeys.

How do you know if your software is set up correctly for dynamic forecasting?

Presented by: Neil Van Walbeck

How does an ERP administrator know when their Prophet 21 system settings need to be reviewed? What behaviors and misbehaviors might Prophet 21 display when those settings aren't quite right? This session promises to develop your troubleshooting skills by diving deep into the underlying logic of critical purchasing, replenishment, usage, and pricing system settings.

PCI Compliance and Convenience Fees

Discussion Panel

A panel of Industry Experts from weAudit.com will take on the HOT topics that everyone wants to know more about.

- PCI - Is it really that hard?
- PCI - Made easy!
- *Convenience Fees versus Surcharges - what's the difference?
- *Can I charge one or the other?

Financial Reporting - How to Keep Clean Financials

Presented by: Carolyn Hunt

This session will cover basic month end functions and balancing to insure financial reports are maintained accurately and efficiently. We will cover basic setup for balance sheet and income statements and processes for bank reconciliation.



11:30 am - 12:30 pm

Creating Financial Statements in P21

Presented by: Stacy Cline

Session will focus on creating and maintaining Financial Statements in Prophet 21. Prophet 21 provides the ability to create and manage financial statements custom to your company. Learn how to map the chart of accounts, create roll-up groups, manage time periods and financial statement templates. Once implemented, companies can drive and produce financial statements in a few simple steps!

Advanced Dynachange Rules - Visual Basic

Presented by: Michael Dean

This class will be an extension of the Beginning Dynachange Rules (VB) class and will go into creating multirow and event driven rules

Demystifying the P21 Database (for New Users to SQL, Crystal, and Excel)

Presented by: Barry Hallman

One of the greatest frustrations one often encounters in trying to retrieve information from the Prophet21 database, is knowing where to look for the data, and having an understanding of how it is arranged. We intend during this time to gain an understanding of how the P21 database is formed and arranged, and how this data can be used in SQL, Crystal, and Excel. We will also look at some tools that will assist us in finding where our target data is stored in the database. The material is intended for those with little or no experience with reporting from a database.

Creating Your Value Proposition

Presented by: Texas A&M

During this interactive session, participants will develop a Value Proposition that will help them establish their credibility and the credibility of their company when meeting people for the first time. This Value Proposition will help participants to differentiate themselves from their completion and give others a good reason to want to know about them and what they have to offer. At the completion of this session participants will have developed a tool that will increase their confidence and comfort level when meeting people for the first time.



Optimize Invoice Processing Efficiency with an Automated Solution Designed for Prophet 21

Presented by: CVISION Technologies, Inc.

When looking for ways to grow a lean, cost-effective business, organizations often neglect invoice processing. Existing systems usually contribute high paper storage costs and clutter, valuable time spent on manual data entry, and potential late fees due to missed payments and similar errors.

This session will focus on a solution designed for Epicor Prophet 21. This software solution minimizes the inefficiencies associated with manual accounts payable processes through invoice processing automation. Any fiscally responsible accounts payable manager / supervisor, IT professional, or CFO aiming to cut down on internal expenses will find this presentation to be incredibly valuable. By utilizing OCR for invoice scanning and implementing an automated data extraction process, an organization can transition toward the paperless office, enabling it to achieve a rapid, tangible ROI in reduced accounts payable costs.

Tour de Force and P21: Integrated CRM and Business Intelligence

Tour de Force seamlessly integrates with P21 to deliver dashboards, scorecards, reports, analytics, and KPI tracking, allowing you to spot trends, manage sales goals, and improve the visibility of your quotes and opportunities. With Tour de Force, your sales and service teams have a 360° consolidated view of all key customer information including data pulled directly from P21. They save time accessing actionable customer data and can instead focus on increasing sales and delivering an excellent customer experience.

During this breakout session we will provide a brief introduction to Tour de Force followed by a demonstration of our P21 integration and the features that are most beneficial to P21 users. We will also provide an overview of Tour de Force Cloud, our new hosted solution which removes the need for the IT server and database infrastructure that is required for our on-premise solution.

12:30 pm - 1:30 pm

Advanced Dynachange Rules (C#)

Presented by: Kent Vela

This Advanced session assumes basic knowledge of rules and how to implement them. We will start with Cascading, Multi-line, and Datastream rules then continuing on to using the Rule Probe and how to fire a rule for testing outside of P21. Finally, we will go into some “pitfalls” that can be worked around to give rule functionality where it seems rules cannot be applied.



P21 Alerts: The Crash Course

Presented by: Sam Snow

We will start with the basics of setting up Alerts in P21 and then briefly cover using HTML in alerts. We will finish up with alternatives to native P21 alerts and some of the common alerts that TJ SNOW uses each day.

SSRS (SQL Server Reporting Services) - Advanced

Presented by: Landon Edwards

For those that have set up SSRS and want to know more, you will learn how to work with parameters, multiple data sources, matrix reports, linked reports, sub reports, interactive sorting, report automation (scheduling) and a few tips and tricks on turning reports into alerts.

AgileShip Connect for Prophet 21

Agile is proud to introduce the new version of our very successful Connect product for the Prophet 21 community.

AgileShip Connect provides one click access to popular carrier's software programs and services including international. It will return tracking, charge and order status to Prophet 21.

Agile has a wonderful 26-year history with Epicor and hundreds of customers.

1:45pm - 2:45pm

How Element, Credit Cards and P21 Work Together

Presented by: Dyann Lamar

This seminar will explain general credit card basics. Also how to set-up the credit card function in P21. Last the seminar will go over the process from beginning to end of taking a credit card payment in P21.

UPS/FedEx Integration with P21

Presented by: Michael Dean

This class will cover how to integrate P21 with UPS Worldship and FedEx Ship manager



SQL Server Health Checks

Presented by: Heraflux Technologies

The database server underneath P21 is a special beast all on its own. This highly technical session will help you lead an investigation into the performance of the database server and P21 databases underneath the P21 application. The SQL Server environment will be examined in depth. A rigorous health check from all the layers of SQL Server, including instance configuration, parallelization settings, and non-default performance and scalability improvements, will be introduced. Database-specific details designed to detect how YOU use P21 and options to improve its performance will also be discussed in detail. Valuable scripts, tips, and architecture concepts will be addressed so that you can perform a thorough analysis on your P21's SQL Server environment and make a difference!

Demand Driven Replenishment - "Flowcasting" Is Common Sense, But Not Always Common Practice

Presented by: Howard Coleman and Rick Morris

Howard Coleman of MCA Associates and Rick Morris of Thrive Technologies will present two contemporary and complimentary methodologies that you can start using, right now, to increase your inventory turns, fill-rates and sales demand forecasting accuracy. These methodologies can work in conjunction with your Prophet 21 software. Morris will discuss *Demand Driven Replenishment*, focused on:

- proven benefits to improving demand forecast accuracy
- demand examples in which some effort - reaps big benefits
- how to go about measuring your own forecast accuracy

Coleman will discuss the concept of "Flowcasting"; that works in conjunction with demand driven replenishment;

- the importance of your "inventory drivers" and their impact on demand forecasting
- increasing product flow and velocity thru your supply chain
- "Pull" inventory replenishment versus "Push"
- Accelerating the time-line towards the adoption of some new DNA in your practices

Is your company ready for CRM?

Presented by: **SMP - Sales Management Plus**

Are you ready to:

- Put everyone on the same page
- Reduce/Eliminate Sales Attrition
- Close 25% more of your Active Bids/Quotes
- Effectively manage Sales Rep & Territory Performance Tracking
- Do Targeted email marketing



In this session:

SMP will demo of their integrated CRM/BI solution and share best practices on how CRM can impact your business.

The SMP team is also excited to introduce the new **SMP Bid/Quote closer module** - the easiest way to get an instant ROI on your CRM investment.

Close 25% more bids/quotes – simply by turning on SMP’s Bid/Quote Closer. Do you wish you could better measure your ROI? Start tracking and actively managing your open bids/quotes with SMP! Give your team an easy way to see the “wins”!

Segmenting your Inventory: ABC Classes

Presented by: Neil Van Walbeck

ABC analysis provides a mechanism for identifying items that will have a significant impact on overall inventory cost. It refers to different categories of stock (A, B and C) that require different management and controls. In enterprise resource planning (ERP) software systems, it’s an area with so many options and features, it is often under used and/or abused.

Integration Options with P21

Presented by: Rick Sundahl

P21 meets most of your needs, but sometimes there are applications that need to integrate with the P21 data. While P21 provides a lot of functionality for your business needs, no software is able to provide ALL your functionality. This session will present the multiple options to enhance and integrate with P21 including ODBC, APIs, Web Services, etc.

Case Study: Creating Custom Automation for Autocrib Vending

Presented by: Tony Filipovic and MindHarbor

Jergens Industrial Supply recently partnered with MindHARBOR to create an e-vending integration solution for their AutoCrib industrial vending customers. Our teams collectively retooled the entire workflow process from the vending machines all the way back into a new Vending management area within Prophet 21. This solution gives nightly replenishment details, better visibility within P21, automated workflows between systems and increased reporting capabilities. These improvements have increased the level of customer service, inventory management and employee productivity. Attend this session to hear more about this E-Vending tale and then join in a round table discussion about the latest, greatest in vendor and customer managed inventory programs for the P21 user community.



3:00 pm - 4:00 pm

- Accounting Roundtable
- Ecommerce Roundtable
- Canadian Roundtable
- Mexico Roundtable
- WWMS Roundtable
- EDI Roundtable
- Inventory/Purchasing Roundtable