



# 2019 CLIENT CONFERENCE

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THURSDAY, OCTOBER 10TH  
HERITAGE HOTEL SOUTHBURY, CT

# CONFERENCE AGENDA

## WEDNESDAY, OCTOBER 9TH

6:00 - 10:00

Client Welcome Reception + Dinner

## THURSDAY, OCTOBER 10TH

8:00 - 8:30

Registration & Breakfast

8:30 - 9:00

Opening Remarks

9:00 - 10:00

New in Sage 100cloud 2019 + the Road Ahead

10:00 - 10:15

Morning Break + Raffle

10:15 - 11:00

New DSD Enhancements for Sage 100cloud

11:00 - 11:30

The Connected Warehouse & Production Floor  
The New way to Process Payments in Sage 100

11:30 - 12:00

The State of Sales Tax and Remote Selling  
Sage Inventory Advisor for Sage 100cloud

12:00 - 1:00

Lunch & Product Showcase

1:00 - 1:45

Solving Paper Pains w/ Sage + Altec + DSD

2:00 - 2:30

The Future of B2B Fintech  
CIMcloud: Quit Losing to the Competition

2:30 - 3:00

Streamline Your Distribution Process

3:00 - 3:15

Revamp your HR by January 1st

3:15 - 4:00

Afternoon Break + Raffle

"Sage 100 Can Do That?!" *\*CLIENT FAVORITE\**

4:00 - 4:30

Closing Remarks & Finale Raffle

5:00 - 7:00

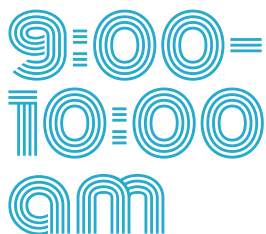
BONUS SESSION in The Tavern

# GOLD SPONSORS

# sage

## *Company Overview*

Sage Software provides end-to-end financial accounting, ERP, CRM, HRMS and Business Intelligence (BI) solutions to businesses worldwide. With operations throughout the UK, Europe, Australia, Asia and South Africa and North America, the Sage Group has an installed customer base of over 7.1 million small & medium-sized businesses around the globe.



## **New in Sage 100cloud 2019 + The Road Ahead**

**Presenter: Elliott Pritchard, Sage Software Engineer**

Get a look at what new features have arrived in 2019 and what is on the horizon to be released for Sage 100cloud and

In this session Elliott will provide you with the details about what has changed in the last year and what is poised for the upcoming 2020 release.

This session will also include the Sage roadmap with details on upcoming product releases and add-on solutions.

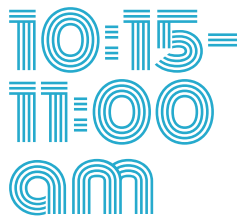


# GOLD SPONSORS



## *Company Overview*

DSD Business Systems has been a Master Developer Partner for Sage software since 1988, extending Sage 100 functionality by bringing hundreds of custom and proprietary Enhancement products to market. These include the renowned Multi-Currency Management, Multi-Bin Management, InstaDocs, SQL Mirroring, Cash Basis, Multi-Company, Multi-Language, State Quarterly Magnetic Media Reporting and many more.



### **Newly Released & Most Popular DSD Enhancements for Sage 100**

**Presenter: Nicole Ronchetti, Director of DSD Enhancements**

See the latest from DSD Enhancements. In this informative session, we'll showcase some of the newest enhancements that have been released over the last year for Sage 100cloud users.

You'll see a few of our new most popular products:

- Master Invoice
- Upsell, Audit Tracking for SO & PO
- Bank Rec & Cash Receipts History.
- and so much more!

# GOLD SPONSORS



## *Company Overview*

Altec is a leading provider of Integrated Document Management (IDM) solutions to mid-market companies. Since 1985, Altec has provided a wide range of accounting-centric paper to paperless solutions including its flagship product, doc-link™, which enables companies to capture, archive, workflow and route structured and unstructured documents to customers, employees and vendors. Altec's comprehensive solutions include IDM, output management, MICR check disbursement and paper documents that serve more than 13,000 customers worldwide.



### **Solving Paper Pains & Bottlenecks: Three solutions to take you paperless**

**Presenter: Laura Lechien, Sales Director, Northeast**

Learn how to help your organization go paperless and reduce the traditional issues of dealing with paper with one of these 3 solutions:

**Sage Paperless Office:** If you need to view Sage documents only and send documents out via email

**DSD Instadocs:** If you only need to store documents electronically and also want to view documents in Sage.

**PaperlessPlus by DocLink:** full document management and workflow solution to streamline entire process from PO capture, AP Automation, Check capture and easy search and retrieval.

# SILVER SPONSORS

## sage Production Management

Powered by 

Powered by Scanco

11:00=  
11:30  
am

### Product Focus

Sage Production Management

### Presented by

Darin Steward  
VP of Manufacturing Sales

## Company Overview

Scanco, LLC meets the needs of thousands of distribution and manufacturing operations with an extensive line of warehouse management solutions and mobile sales designed to integrate with Sage 100. Our products provide the functionality to perform inventory management, work order processing, mobile sales, delivery route accounting and barcode printing.

### The Connected Warehouse and Production Floor: Sage Production Management Powered by Scanco

Sage Production Management helps manufacturers overcome modern supply chain complexities by giving discrete make-to-stock manufacturers and fabricators the tools they need to achieve end-to-end visibility into their entire production & distribution process.

By centralizing the production process with Sage Production Management, assemblers, manufacturers and, fabricators always know their costs, the status of items, and the material quantities required to meet demand.

During this session you'll learn practical means on how to curtail complexity, increase visibility into your processes and, efficiency gains that Sage Production Management can deliver to your organization.



## Company Overview

APS Payments works diligently to get you the lowest credit card processing rates, reduce your risk, and provide the best solutions for your business. Batch processing, seamless integrations, and automation tools such as recurring billing increase your business' efficiency and improve cash flow. From multiple payment methods to multiple currencies, we provide trustworthy service for every business and every payment.

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11:30  
am

### Product Focus

Credit Card Processing

### Presented by

Patty Benitez  
Sr. VP of Channel Sales

### The New Way to Process Payments in Sage 100: Get Sage 100 invoices paid with no additional cost!

Your Sage 100 ERP solution is the backbone to your business. Today, more and more of your customers want you to accept payment via all sorts of credit cards.

In this case, look no further than APS Payments to provide you with a simple and effective Sage 100 credit card processing integration that allows you to reduce risk, decrease fees and increase your company's revenue.

Attend this session to see how Click-to-Pay is the fastest way to get Sage 100 invoices paid with no additional cost.

# SILVER SPONSORS

**sage** Inventory Advisor

Powered by **NETSTOCK**  
Make better inventory decisions

## Company Overview

NETSTOCK is a Software as a Service company that lives in the cloud, and connects with your ERP system. It provides insights into your Excess Inventory, Surplus Purchase Orders, Fill Rate, Stock outs and Potential Stock outs managing demand forecasting for all your items, And recommends ideal Purchase orders that will always drive your investment in inventory down, while increasing your service level to your customers.

11:30-  
12:00  
PM

## Sage Inventory Advisor for Sage 100cloud Powered by Netstock

Sage Inventory Advisor connects directly to your Sage ERP to give you an immediate and clear view into your warehouse. You'll quickly identify the most important problem areas in your inventory levels, and you'll learn how to create dynamic item forecasts that'll give you insights into your business that a spreadsheet never will. In fact,

Sage Inventory Advisor will help you create perfect purchase orders in minutes. If you have inventory, you should visit this session to see if this surprisingly inexpensive app is a fit for your business

### Product Focus

Sage Inventory Advisor

### Presented by

Eric Graf  
Director of Marketing,  
North America

**Avalara**

Tax compliance done right

## Company Overview

Avalara helps businesses get tax compliance right. Avalara's customers face demanding tax obligations imposed by state, local, and other taxing authorities around the world, and rely on Avalara to provide efficient and accurate solutions to manage those requirements. The company provides solutions for various transactional taxes, including sales and use, VAT, excise, communications, and others.

11:30-  
12:00  
PM

## The State of Sales Tax and Remote Selling: A Year+ After the South Dakota v. Wayfair, Inc. Ruling

How have the rapid changes from the South Dakota v. Wayfair ruling led to growing pains for your business?

What's the state of remote selling now, more than a year after the ruling?

John Regan, Sr. Strategic Alliance Manager @ Avalara will share:

- What the ruling is and what to do as its impact on your business grows
- What changes are affecting remote sellers using marketplaces
- How automating sales tax compliance can mitigate risk and in some situations, even be **free!**

### Product Focus

AvaTax

### Presented by

John Regan  
Sr. VP of Channel Sales,

# SILVER SPONSORS



## Company Overview

What began in 1985 as a small forms company has evolved into a world-class business solution provider that continues to grow and expand with the help of loyal customer feedback, a dedicated and motivated team and an invested commitment to being the problem solver for businesses worldwide.

2:00=  
2:30  
PM

### CIMcloud for Sage 100: Quit Losing to the Competition

If you're not allowing your customers to view their Sage 100 data, products, and pricing online then they'll find someone who does. CIMcloud's bolt-on solution leverages it's best in class integration to make life easier for your customers (and employees).

#### Learn how CIMcloud:

- = Allows your customers to self-service on orders, payments, invoices, quotes, tickets, shipments, and more - anywhere, anytime, on any device.
- = Gives employees remote access to Sage 100 data for use in the field.
- = Frees up your Customer Service team from answering questions like: "What's my price?" or "Is this product available?" "Where's my shipment?" or "How do I pay this invoice?"

**Product Focus**  
CIMcloud

**Presented by**  
Jack Evans  
Marketing & Channel Manager



## Company Overview

AvidXchange revolutionizes the way companies pay their bills. Serving more than 5,500 clients throughout North America, AvidXchange is an industry leader in automating invoice and payment processes for midmarket companies spanning multiple industries including Real Estate, Financial Services, Energy, Nonprofit, and Construction.

2:00=  
2:30  
PM

### Embracing Emerging Technologies: The Future of B2B Fintech presented by AvidXchange

New research sponsored by AvidXchange reveals compelling new insights on the future of financial technology (fintech) in the business-to-business (B2B) space.

While B2B companies are becoming more knowledgeable about disruptive technologies to transform financial processes, most are unaware of how innovations like artificial intelligence (AI), machine learning, big data and blockchain are changing the way they work.

This session will review the research and cover:

- = How emerging technologies are impacting the B2B fintech space
- = Current trends with AI, machine learning, big data and blockchain
- = How organizations leverage fintech to transform the way they work

**Product Focus**  
AP Automation

**Presented by**  
Jennifer Andreas  
Alliance Manager



# SILVER SPONSORS



## *Company Overview*

ScanForce is the industry-leading barcode scanning and mobile warehouse & sales automation solution for Sage 100 / Sage 100cloud and Sage Intacct. For over 20 years, we've been focused on helping our manufacturing and distribution clients manage their warehouse and business operations more effectively with the use of bar codes and mobile devices. Founded on excellent products and unmatched support, our commitment to the success of our clients and partners is at the forefront of everything we do.

2:30=  
3:00  
PM

## Streamline Your Distribution Process

In this session, you'll learn why ScanForce's mobile apps are the preferred solution for Sage users in manufacturing and distribution who want to maximize warehouse efficiency.

### **Product Focus**

Distribution Management

### **Presented by**

Tim James  
Sales Consultant

With ScanForce, you can automate warehouse transactions such as shipping, receiving, and inventory transactions like adjustments, transfers and physical counts with a simple user interface that's fast and reliable.

Join us to see how ScanForce's mobile and bar code scanning solutions help you easily capture activity related to the movement of inventory with seamless integration to Sage 100 / Sage 100cloud.

**Criterion** <sup>HCM</sup>

## *Company Overview*

Criterion built its HCM software specifically for the needs of mid-sized companies based on 30 years of experience. We simplify every aspect of workforce and talent engagement across the entire employment lifecycle. And everyone in your organization—from HR to the c-suite to managers and employees—will love using our simple, modern platform.

2:30=  
3:00  
PM

## 4 Reasons to revamp your HR by January 1st Presented by Criterion HCM

Criterion's Human Capital Management is a user-friendly, intuitive system that provides smoothly integrated Human Resources & Benefits, Payroll and Talent Management, Time Tracking and Attendance solution and more.

Regardless of your role in HR or Payroll, Criterion HCM provides the capabilities needed to effectively manage the entire employee lifecycle.

### **Product Focus**

Cloud HR Software

### **Presented by**

Gary Anderson  
Director of Sales

# BRONZE SPONSORS



Stop by the V-Technologies table to learn valuable insights for streamlining the shipping workflow and related supply chain functions throughout the organization. Make sure to ask about the new user experience with integration to Sage 100 and Acumatica!

## Company Overview

V-Technologies, LLC is an established and growing technology company specializing in the design, development and support of integrated shipping software solutions. Our flagship products, StarShip and ShipGear, provide connectors to ERP, accounting and business applications to automate shipping, accounting and customer service.

## VENUE + LOCATION

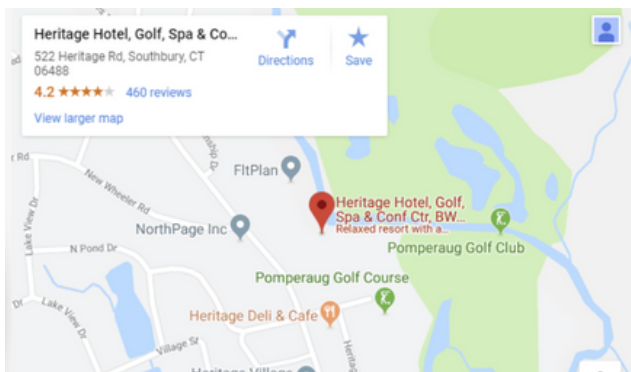


## Heritage Hotel

522 Heritage Road, Southbury, CT  
(203) 264-8200

A distinctive, full-service resort destination in the hills of Connecticut offering rustic ambiance & modern amenities.

Experience the riverside golf course, world-class health club, rejuvenating spa, heritage winery, tennis, conference center, and unique regional activities.







# 2019 CLIENT CONFERENCE

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TO REGISTER, VISIT:  
[GO.DSDINC.COM/DCC2019](http://GO.DSDINC.COM/DCC2019)