



EVENT INFORMATION

July 30, 2019
Hilton Garden Inn
Emeryville, CA

Welcome to Connections, our Customer Day focused on enhancing your Sage experience. You will have the opportunity to learn tips and tricks, view what's ahead, and explore how connected solutions in the Sage ecosystem can streamline your critical business processes. The event will deliver rich content, meaningful networking, expert mentoring, and product knowledge – a must attend event for thought leadership, inspiration, and learning.

Today's Agenda with CPE Sessions Highlighted

9:30 a.m. – 10:00 a.m.	Arrival, Registration and Exhibitor Showcase Opens	
10:00 a.m.	Welcome & Introductions	Rooms 1 & 2
10:15 a.m. – 11:15 a.m.	Breakout Session 1	
	<u>Option 1: Tips and Tricks for Sage 100 (1 hour CPE, CS&A)</u>	Room 3
	Learn about new software functionality and acquire new skills to get the most out of your Sage 100 investment. Attend this session for classroom training presented by Certified Sage 100 Consultants. Upon completing this session, participants will:	
	<ul style="list-style-type: none">- Improve navigational usage of Sage 100.- Access data quicker and learn how to use analytics to facilitate better decision-making throughout the organization.- Improve operational efficiency, eliminate manual processes, and increase transactional precision and performance.- Leverage modern technology by learning and implementing new features	
	<u>Option 2: Tips, Tricks and Common Questions for Sage X3 (1 hour CPE, CS&A)</u>	Room 4
	Learn about new software functionality and acquire new skills to get the most out of your Sage X3 investment. Attend this session for classroom training presented by Certified Sage X3 Consultants. Upon completing this session, participants will:	
	<ul style="list-style-type: none">- Improve navigational usage of Sage X3- Access data quicker and learn how to use analytics to facilitate better decision-making- Improve operational efficiency and eliminate manual processes- Increase transactional precision and performance- Leverage modern technology by learning and implementing new features	
11:30 a.m. – 12:00 p.m.	Sponsor Breakout Session 1 (Refer to Sponsor Information for solution details)	
	<u>Option 1: Learn about Sage Business Cloud: Sage Intacct</u>	Rooms 1 & 2
	<u>Option 2: Go Paperless with Sage Document Management, DocLink</u>	Room 3
	<u>Option 3: Automate Your Entire AP Process with AvidXchange</u>	Room 4
12:00 p.m. – 12:25 p.m.	Lunch, RKL Update & Sponsor Spotlight	Rooms 1 & 2

12:30 p.m. – 1:30 p.m. Breakout Session 2

[Option 1: The Road Ahead – Sage 100](#)

Room 3

The Sage 100 Road Ahead presentation provides a glimpse of the product development goals and new features that are coming to Sage 100 and Sage 100cloud.

[Option 2: The Road Ahead – Sage X3](#)

Room 4

The Sage X3 Road Ahead presentation provides a glimpse of the product development goals and new features that are coming to Sage X3 and Sage X3 Cloud.

1:45 p.m. –2:15 p.m. Sponsor Breakout Session 2 (Refer to Sponsor Information for solution details)

[Option 1: Benefits of outsourcing your Cloud with Expedient](#)

Rooms 1 & 2

[Option 2: Put an End to Inefficient Planning Cycles with Adaptive Insights](#)

Room 3

[Option 3: Automated Sales Tax and Compliance by Avalara](#)

Room 4

2:30 p.m. –3:30 p.m. Breakout Session 3

[Sage Intelligence versus Sage Enterprise Intelligence \(1 hour CPE, CS&A\)](#)

Rooms 1 & 2

Reduce spreadsheet chaos and improve collaboration within your current Sage business management solutions, paving the way for growth and long-term success. This session will provide an introductory overview of both Sage Intelligence and Sage Enterprise Intelligence reporting capabilities. Learn about new software functionality and acquire new insights for business intelligence and reporting. You'll learn about business use cases, product differences and benefits, empowering you to design your own reports for your team.

3:30 p.m. General Sessions Conclude

3:30 p.m. – 5:00 p.m. One-On-One Sessions (Please schedule in advance with an RKL teammate)

5:00 p.m. Closing

In accordance with the standards of the National Registry of CPE Sponsors, participants may earn up to 3 CPE credits in the Computer Software & Applications and Professional Development fields of study, based on a 50-minute hour.

Prerequisites: *None*

Who Should Attend: *Sage Software Customers & Prospects– Sage 100, Sage X3*

Advanced Preparation: *None*

Program Level: *Basic*

Delivery Method: *Group-Live*

NASBA Approved

RKL LLP (Sponsor # 133745) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

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SPONSORS

Sage Intacct - Sage Intacct is a true, multi-tenant cloud application for financial management professionals. Recognized as a leader among its competitors by G2Crowd and endorsed by the AICPA, Sage Intacct delivers financial accounting software that transforms organizations with real-time business reporting visibility and mobile, web-based accessibility anywhere, anytime.



Adaptive Insights - Adaptive Insights, a Workday company, is powering a new generation of business planning. Driving business agility in a fast-moving world, the Adaptive Insights Business Planning Cloud leads the way for people in companies to collaborate, gain insights, and make smarter decisions faster. Adaptive Insights integrates with all Sage Software platforms.



Altec - is a leading provider of integrated document management and process automation solutions. Its flagship product, DocLink, is the only Sage-endorsed document management solution, integrating with Sage 100, 500 and Sage X3. Helping companies connect people, processes and data DocLink provides them with the ability to store, search, retrieve and send any document securely. DocLink effectively eliminates the need for paper while automating processes that improve organizational efficiency and reduce costs associated with human errors for the following but not limited to: AP Automation, Sales Order Processing, AR Invoice Distribution, Contract Management, HR Onboarding, Purchasing & Receiving, Service & Maintenance, Expense Report Management, Corporate Credit Card Reconsolidation, Claims.



Avalara - offers cloud-based sales and use tax management solutions. Avalara's end-to-end solutions seamlessly integrate with all Sage Business Management solutions, accounting, ecommerce, and retail POS systems, providing accurate sales and use tax calculation, painless exemption certificate management, and effortless filing and remittance.



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. AvidXchange's invoice and payment automation software streamlines the entire accounts payable process for enhanced reporting, optimal spending, and better budgeting for your entire organization.



AVIDXCHANGE PARTNER

AP AUTOMATION SOLUTION PROVIDER RESELLER

Delphia Consulting – helps employers drive employee engagement and achieve organizational objectives with a comprehensive selection of HR and Payroll software and services delivered by a team of experts. Our solutions track goals and OKRs, inform decision making with people analytics, and manage the entire employee life cycle with paperless self-service – from recruiting, onboarding, and performance management to retirement.



Expedient - is a cloud and data center infrastructure as a service (IaaS) provider with local operations in Pittsburgh, PA; Baltimore, MD; Boston, MA; Cleveland, OH; Columbus, OH; Indianapolis, IN and Memphis, TN. Ranked as one of the Top 10 managed services providers worldwide on the 2017 MSPMentor 501 list, Expedient's converged solutions enable clients to focus on strategic business innovation, while the Expedient team handles operation of the information technology needed to support it.



EVS - founded in 2001 by an innovative team of warehouse management and supply chain technology experts. In 2016, this team set out to reimagine WMS, bringing modern design and a powerful platform to increase visibility and velocity in their customers' supply chain operations. EVS serves hundreds of customers in industries that include manufacturing, food and beverage, life sciences, chemicals, biotech, electronics and distribution organizations.



Floqast - is close management software, created by accountants for accountants to close faster and more accurately. On average, accounting teams who rely on FloQast close three days faster. Seamlessly integrated with ERPs and leveraging your existing checklists and Excel, FloQast provides a single place to manage the month-end close and gives everyone visibility. The cloud-based software is trusted by hundreds of accounting departments, including those at Door Dash, AdRoll, Indeed, Shopify, Ancestry.com, Twilio, Dollar Shave Club, Zillow and the Golden State Warriors.



Paya, Inc. - provides simple, secure technology options enabling businesses to accept payments, get paid faster and increase efficiency. Paya's seamless payments platform delivers easy-to-use technology to support every stage of a business' growth, today and tomorrow. With more than 100,000 clients and two decades of payments processing, Paya offers adaptive solutions and technology expertise and is dedicated to driving the success of partners and customers. Paya is a GTCR backed company headquartered in Reston, VA, with offices in Atlanta, GA, and Fort Walton Beach, FL.

