



# PANELS SESSIONS

**AUGUST 6-8**

JW MARRIOTT | L.V. EBERHARD CENTER  
GRAND RAPIDS, MICHIGAN



**BACK TO THE  
FUTURE**

**OPEN TO ALL TRACKS**

## Operational ERP Spotlight

Sessions will feature speakers from Apple, Steelcase, The Right Place, 100X, Michigan State University, and Grand Valley State University.

### SESSIONS INCLUDE:

- 411 on Funding Steams and Involvement in Industry Councils
- 4 P's of Marketing Your Distribution Company
- How to Train your Workforce
- Marketing Automation and Workflows
- The Marriage of Lean and ERP
- Sell Through Vs. Sell In: The Next Step in Supply Chain Management

*More sessions to be announced at a later date.*

## FEATURED PANEL DISCUSSIONS

These panel-style sessions will focus on a variety of topics during a live discussion between leaders in the industry. You'll get the opportunity to ask questions and learn from experts working on the front lines. Different from the classroom style sessions, these panels will allow you to interact directly with the panelists.

### There will be five panel sessions with topics for:

- Customer Service Management
- Marketing Your Business
- Partner Panel
- Sales Management
- Warehouse Management

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**Advanced Quick Reporting in Salespad** – Getting your hands on the data that can help mold key business decisions is huge. In this session, we'll discover how Quick Reports in SalesPad Desktop can be used to make finding the data you're after simple. *You must have previous SQL experience to attend this session.*

**Advanced Workflow Operations** – This session is meant for the workflow warriors looking to get even further into the weeds. We'll dive into the nitty gritty details around rules and plugins, then investigate specific scenarios where workflow can help smooth out a variety of issues. *You must have previous workflow experience to attend this session.*

**Building Dashboards in SalesPad Desktop** – You like graphs, pie charts, gauges, and pivot tables, right? Well, they're more than pretty pictures. Follow along as one of our consultants shows you how you can build these on your own to get all the data you need for key decision making in your business. *SQL knowledge is helpful, but not required.*

**Business Process Reviews: The What, The How, and The Why** – Ever wondered if you could be doing more with the software you already own, or if a customization could improve your process? Learn the five reasons why a full business process review could help your company take the next step in productivity. This session will be lead by a SalesPad Business Analyst.

**Configurator Deep Dive** – If you have a company that makes your product to order, join this session! We'll be discussing the benefits of using the SalesPad Configurator for your customizable made-to-order products.

**CRM in SalesPad** – If you're in the market for a better way to manage and engage prospects and customers, we've got the session for you. Follow along as we walk you through SalesPad Desktop's CRM functionality.

**DataCollection Overview** – Looking to improve your warehouse operations? Look no further. We'll guide you through the major factors to consider before implementing any warehouse management system.

**Dispatch & Route Sales** – Plan routes, check in and out of stops, prioritize the day, and more. Join us as we take a look at how the Dispatch module in both SalesPad Desktop and SalesPad Mobile can revitalize your trucking operations.

**Essential Tips & Tricks in SalesPad** – Think you know all there is to know about SalesPad Desktop? Maybe you do...but maybe you don't. Test your knowledge while also learning additional timesaving and must-know tips and tricks!

**Getting the most out of SalesPad Support** – Listen in as members of our exceptional Support Team give you some tips and tricks on best practices for utilizing their services, ensuring that you get the best experience and the quickest answers possible.

**How to Get More out of SalesPad** – Whether you've recently gone live with SalesPad or you just think you could be getting more out of our software, this session is for you.

**Integrations Available for SalesPad** – Did you know SalesPad offers integrations with other software vendors? Follow along to find out if we offer any integrations that could benefit your business now or in the future.

**Intro to Workflow in SalesPad** – New to SalesPad or just never had a chance to implement workflow? Here's your chance! This introductory session will cover the basics of workflow and show you how to use it to help eliminate bottlenecks in your operations and expedite order processing.

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**Is Enhancement Worthwhile?** – Not sure paying for enhancement is worth it? (It is.) This session will walk through why paying for enhancement greatly enriches the product you use every day and creates a better experience for you as a customer.

**Making the Switch to PayFabric** – This session is a must for existing CardControl users. You'll learn the benefits of switching over to PayFabric for your credit card processing needs within SalesPad Desktop, and we'll cover what you need to know and prepare for before making the big switch.

**Manufacturing Deep Dive** – Follow along for a more technical look at SalesPad Desktop's integration to the Dynamics GP Manufacturing module. Key topics discussed will include MO creation through workflow, manufacturing BOM setup and use, use cases for the module, and much more.

**New Features in SalesPad** – This fast-paced session gives you the lowdown on all the newest features released in all of SalesPad's products over the past year. Don't blink or you might miss one.

**Order Optimization** – This popular session is great for both everyday users and those with a bit more technical aptitude. Check out all the ways SalesPad Desktop can handle entering line items on a quote, order, or invoice, including matrix-style entry, item options, configurable items, auto convert of non-inventory items, and several more options.

**Payments in SalesPad** – No matter how many credit card sales your business deals with, this session is for you. You'll get the lowdown on how both SalesPad Desktop and SalesPad Mobile can take the stress out of credit card transactions.

**Pricing in SalesPad** – Pricing is one of those topics unique to every business. Luckily, SalesPad Desktop has varied pricing options available for even the most complex scenarios. Take a look at group and special pricing, sales line promotions, aggregate pricing, discounts, and other pricing tools.

**Purchasing Tools in SalesPad Desktop** – This session is perfect for anyone who makes purchases on behalf of their company. In this user-focused demonstration, you'll learn how to get the most out of the purchasing tools in SalesPad Desktop.

**Report Designer Deep Dive** – Another PANELS mainstay, this session will cover the ins and outs of the SalesPad Report Designer. If you're looking to learn how to create and modify your own printed forms, you don't miss out on this one!

**SalesPad API Overview** – In this popular session, SalesPad developers lead a deep dive into the Desktop API and explore the wide-ranging ways in which it can be utilized. Get your API questions answered (and maybe have your mind blown) here.

**SalesPad Customer Showcase** – Ever wonder how other businesses use SalesPad? Hear firsthand from fellow SalesPad Desktop users about how they use our tools to help keep their businesses running smoothly.

**SalesPad EDI Overview** – If you haven't already, now is the time to check out SalesPad Desktop's integration with SPS Commerce for EDI. See how to greatly improve EDI processes through SalesPad Desktop's powerful workflow functions as you seamlessly send EDI documents into your system and out to trading partners.

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**SalesPad in the Field** – Check out how SalesPad products can be utilized in a service-oriented business. We'll dive into topics such as managing outbound equipment, rental contracts, work order management, and utilizing SalesPad products for field service technicians.

**SalesPad Mobile Overview** – SalesPad Mobile provides service technicians, salespeople, delivery drivers, and more with the power of SalesPad Desktop in their pocket. Learn the key features and best ways to use SalesPad Mobile.

**SalesPad Suite General Overview** – Looking to learn more about what SalesPad offers? In this session, we will give you a high-level overview of all of the SalesPad products (not including SalesPad Desktop). Learn about our add-on apps, our mobile solutions, and more.

**SalesPad WebPortal Overview** – Get a firsthand look at the WebPortal, SalesPad's B2B web application. We'll walk you through a high-level demo, provide insights into potential use cases, and answer any questions you might have.

**ShipCenter Overview** – During this full walkthrough, you get an in-depth look at how ShipCenter interacts with other SalesPad products, plus learn more about general shipping practices.

**Troubleshooting in SalesPad** – What better way to learn how to troubleshoot your software than to get some tips from the people that troubleshoot it every day? Join this session to get some inside tips on how we diagnose and solve everyday issues.

## PARTNERS ONLY

**Co-Marketing with SalesPad** – Join us to explore the many options you have to market to your customers and prospects with SalesPad. We'll discuss not only how we can help, but how you can do it on your own as well.

**Sales Certification Prep** – Nervous about the sales certification test, or just a bit rusty? Then this session is for you. Find out what you need to know in order to pass the sales certification test for the partner program.

**Scripting Best Practices** – This session is perfect for technical partners looking to learn more about how scripting could and should be utilized in SalesPad. Our developers will show you some of their tips and tricks for all things scripting.

**The Future of SalesPad & ERP** – See what SalesPad is doing to keep up with and stay ahead of the technology curve. We'll discuss our continued commitment to Dynamics GP, plus give you a sneak peak at what's ahead for us.

**What to Expect When Working with the SalesPad Professional Services Team** – In this partners-only session, we'll walk through our typical implementation procedures that have helped us successfully implement SalesPad Desktop with hundreds of businesses. We'll also discuss best practices for mutual implementations between partners and SalesPad.