

# Announcing Sage Pro Day!



*This year, Roundup becomes  
Sage Pro Day — a one-day event  
exclusively for Sage Pro<sup>(\*)</sup> users*

**Thursday, June 18, 2009**

(\*) Sage Pro ERP, formerly ACCPAC or SBT Pro Series

# Sessions Agenda

## Sessions Agenda

### 8:30 Continental Breakfast

9:00 **Welcome / Intro - CRM Keynote**  
**\*\* Special Keynote Speaker \*\***

**Ginger Conlon**, *Editor-in-Chief, ItoI Magazine* and nationally renowned speaker on the explosive growth of CRM in business. Ginger is coming from New York solely for this presentation — don't miss her!

**Know Your Customers, Build Your Business:** Companies today amass an overabundance of customer data; unfortunately, much of that information is trapped in departmental silos instead of being shared in ways that lead to useful insight. ItoI Media Editor-in-Chief Ginger Conlon will discuss how to harness the voice of the customer, share it across the organization, and improve your business performance as a result. She'll examine such issues as breaking down departmental silos, encouraging user buy-in of supporting technologies like CRM, and creating a competitive advantage from customer insight. She'll also discuss key trends influencing customer strategy today.

10:00 **CRM Session I (Sage CRM for Pro)**  
**Andrew Vick**, *Regional Sales Manager, Sage CRM* - global CRM leader to the small-midsize business market with over 350,000 users

**The Benefits of Integrating Sage CRM with Your Sage Pro ERP:** SageCRM is an easy-to-use, fast-to-deploy on-site CRM software solution with out-of-the-box but configurable business process automation. It provides enterprise-wide access to vital customer information anytime, anywhere so you can better manage your business with an integrated approach to sales, customer care, and marketing. Learn all about it.

11:00 **EZ-WMS (Warehouse Management for Pro)**  
**David Marotz**, *Director of Application Development*, and 17 year veteran of Productivity Strategies & Solutions, Inc.

**Cost-Effective Automation for Warehouses on a Budget:** EZ-WMS can automate, improve, simplify and streamline any company's pick, pack & ship functions. This warehouse management system was written *specifically to integrate with Sage Pro* and can be further modified to meet any company's specific needs. PSSI clients have dramatically improved warehouse accuracy, reduced costly mistakes and cut inventory costs using EZ-WMS. Learn more about it at this session.

12:00 **CRM Session II (Sage CRM for Pro)**  
**Andrew Vick**, *Regional Sales Manager, Sage CRM*; **Valeria Miller**, *Sales Engineer, Sage CRM*

**A Tour of Sage CRM's Core Functionality: Putting It To Work for You:** This is the follow-up session to the 10:00 CRM session. You'll learn how you can begin to achieve the many benefits of dramatically enhanced customer responsiveness and organizational knowledge that CRM will bring to *your* organization.

### 1:00 Buffet Lunch

1:30 **Winning Revenue with Google**  
**David Harris**, *President, EC Internet, Inc.* has put dozens of companies both large and small onto the Internet doing business successfully, including some of PSSI's area clients. Hear Dave reveal the most effective tools available for e-commerce.

**Winning Revenue with Google:** The Internet is shattering business models and smart companies are using Google to pick up new business. This session will show you how to use five low-cost tools to channel business right to your company. In addition, you will learn how to leverage the vast amount of customer and product data that you already have in Sage Pro. You can use this data to create an integrated web marketing and on-line shopping system. See how manufacturers and distributors are taking advantage of the biggest transformation in business technology in a generation to win revenue and success.

2:30 **Going Paperless with Digital Document Delivery**  
**Tony Karatowicz**, *President, Data Fabrication, Inc.*

**Digital Document Delivery From Accounting With PDFBlaster... Going Paperless Saves More Than Trees:** This is a no-brainer! Learn what we and so many of our customers are doing today to eliminate postage and processing costs on invoices, statements, purchase orders and more, by going... paperless! Outstanding integration with Pro makes this an easy way to save money from day one.

3:30 **Pro Tools / What's NEW in Pro**  
**Jackie Sittley, Vicki Wishin, David Marotz** bring their combined nearly *fifty years' experience* to show you cool tools for Pro.

**Tips, Tools and Add-Ins for Your Sage Pro:** See three of the industry's leading experts on using Pro show you how to get the most out of your system, as well as some Add-Ins we've developed over the years to make you more productive! You'll get tips and overviews on:

- The Tag Inventory System
- The Ultimate Sales Reporter
- Data Drillers, Dashboards, Drill-Down Reports and more
- New Tools & Functionality

### 4:30 Roundup "Sage Pro Day" Concludes

**Sage Pro Day:** Join us for a special event *exclusively* for users of Sage Pro ERP, ACCPAC Pro, SBT Pro Series and even Vision Point. **Learn how you can save money and get more productive now** with Sage Pro.

This year's Roundup event focuses on just one product family (Sage Pro) and the many useful new features, add-ins, and enhancements that continue to make Sage Pro ERP the premiere value in End-to-End software solutions.

**This year, we're emphasizing CRM** — because that's what Pro users are asking about — with a **keynote plus two full sessions** on how CRM can grow your business!

We'll round out the day with sessions on **Pro-specific solutions** for managing your warehouse, going paperless, doing business on the Internet, as well as tours of many useful Pro tools like drill-downs, dashboards, sales reporters, inventory time-savers, new features, and much more. **Don't miss this one-day event!**



**When:** Thursday, June 18, 2009

**What:** **ROUNDUP** ("Sage Pro Day") - an event hosted exclusively for the benefit of our Sage Pro (and potential Sage Pro) customers. On June 18th, you'll learn more about the many things you can do with your Sage Pro business management software system than ever before — all in one place, on one special day. And it's all *FREE*. Even the lunch is on us!

**Who:** Decision makers at any company that...

- \* runs Pro Series (formerly ACCPAC or SBT Pro Series)
- \* especially, anyone running older versions of Pro Series (i.e. 3.x, 5.x, or 6.x, all the way through 7.4)
- \* runs old Vision Point software
- \* is considering an upgrade from their current software
- \* needs a strong CRM solution to *grow* their business

**Where:** PSSI's South Bend offices

6561 Lonewolf Drive, So. Bend, Indiana 46628

For directions, call us or visit: [www.pssiusa.com](http://www.pssiusa.com)

[click on About PSSI, then Driving Directions to PSSI]

**To Register:**

CALL: **574-239-2444**

EMAIL: [seminars@pssiusa.com](mailto:seminars@pssiusa.com)

VISIT: [www.pssiusa.com/roundup](http://www.pssiusa.com/roundup)

FAX: 574-239-8915





**Attention** all users of **Sage Pro ERP**  
(formerly *ACCPAC* or *SBT Pro Series*)  
business management software...

Mark the date: **Thursday, June 18, 2009**

For an event built from the ground up ***exclusively*** for *you...*

## ***Sage Pro Day!***

A full day of solutions, tips, add-ins and productivity enhancing tools ***exclusively*** for users of Sage Pro software — all in one day and one place, and just one time.

***See inside for details and agenda...***

Productivity  
Strategies  
& Solutions  
Inc.

6561 Lonewolf Drive, Ste. 200  
South Bend, IN 46628  
[www.pssiusa.com](http://www.pssiusa.com)