



Vision 2015 Agenda & Sessions

May 12, 2015
Suburban Showplace
46100 Grand River
Avenue
Novi, MI 48374
8am to 5pm

Vision 2015 is The TM Group's 15th Annual Microsoft Dynamics Conference & Expo, a day-long educational event to network with your peers and learn about the latest technology from Microsoft and its ecosystem of Partners and Solution Developers. Vision 2015 offers 5 Tracks and 20+ diverse breakout sessions - including GP, SL, CRM, Office 365 and more. Please find the session descriptions enclosed.

Vision 2015 Tracks

- **Dynamics GP**
- **Dynamics SL**
- **Dynamics CRM**
- **Advanced IT**
- **Executive**



Page Left Intentionally Blank



Welcome to Vision 2015

Our 15th Annual Microsoft Dynamics Conference & Expo

Vision 2015 is our 15th Annual Microsoft Dynamics Conference & Expo, the oldest conference of its kind in the United States. We invite you and your co-workers to join us for this remarkable day of interactive learning, idea sharing, and networking. Each year Vision has grown in excitement and value for our clients and stakeholders, and this year will be no exception. We expect over 350 clients, prospects, sponsors and colleagues to join us as we explore the future of Dynamics GP, Dynamics SL, Dynamics CRM, Microsoft Office 365 and Business Intelligence tools. Our entire team will be on-hand along with record sponsorship from 39 of our local strategic partners and Dynamics ERP and CRM solution developers.

You've told us that you need to be able to leverage your existing investment in software, so we've developed an agenda that will enable you to do just that. The emphasis this year is all about tips, techniques, tools and reporting, the most requested sessions we've been asked for by clients. For those looking for additional functionality to get the most out of your ERP or CRM, we've got a wealth of products available that will amaze and delight you.

We've really gone all out for this year's Vision conference, yet we are still offering this marvelous day at no charge to attendees so that you can see things you've only imagined software can provide to your business. You will see tools that can help you PLAN for anything, ACHIEVE your goals and EXCEED your expectations of what can be accomplished with the ERP or CRM investment you've already made or plan to make.

We also promise a day full of surprises and fun, and fantastic food and prizes. Our team truly looks forward to seeing you at Vision 2015.

Sincerely,

*Judy Thomas, President
The TM Group, Inc.*



Page Left Intentionally Blank



Contents

Welcome to Vision 2015	3
Vision Venue Map	6
Vision Agenda	7
Opening General Sessions.....	9
<i>Welcome by Judy Thomas, President of The TM Group</i>	<i>9</i>
<i>Keynote “Think Forward”, Errol Schoenfish, Microsoft Dir. of Product Management</i>	<i>9</i>
Dynamics GP Track	10
<i>GP 2015 Future Directions, Microsoft Corporation</i>	<i>10</i>
<i>Document Management</i>	<i>10</i>
<i>Upgrade Considerations including Hosting, Azure, and Web Deployment.....</i>	<i>10</i>
<i>Online Procurement, Expenses and Sales Tax & Certificate Automation</i>	<i>11</i>
<i>Budgets, Forecasting, Dashboards & FRx Replacement</i>	<i>12</i>
<i>Payroll, HR, ACA and Employee Self Service & Benefits Portal</i>	<i>12</i>
<i>SmartLists, SmartView, SmartList Builder, Excel Reports, SSRS, & Business Analyzer</i>	<i>13</i>
<i>GP Tips & Tricks</i>	<i>13</i>
<i>Helpful Tools for Dynamics GP & Microsoft CustomerSource & Licensing Processes</i>	<i>13</i>
<i>Client Showcase: Customization, Personalization & Integration Success Stories</i>	<i>13</i>
Dynamics SL Track	14
<i>SL Future Directions</i>	<i>14</i>
<i>Upgrade Considerations including Hosting, Azure, and Web Deployment.....</i>	<i>14</i>
<i>Document Management and Workflow.....</i>	<i>15</i>
<i>Online Procurement, Expenses and Sales Tax & Certificate Automation</i>	<i>15</i>
<i>Budgets, Forecasting, Dashboards & FRx Replacement</i>	<i>16</i>
<i>SL Tips & Tricks, Including Upgrading to SL 2015.....</i>	<i>16</i>
Dynamics CRM Track	17
<i>CRM Future Directions</i>	<i>17</i>
<i>Analyzing Your CRM Data</i>	<i>17</i>
<i>Document Management and Workflow.....</i>	<i>17</i>
<i>CRM Mobility and Portals</i>	<i>17</i>
<i>CRM Tips & Tricks, Including Upgrading Your CRM</i>	<i>17</i>
Advanced IT Track	18
<i>Upgrade Considerations including Hosting, Azure, and Web Deployment.....</i>	<i>18</i>
<i>Office 365</i>	<i>18</i>
<i>Advanced Network & Data Security.....</i>	<i>19</i>
Executive Track.....	20
<i>Who is The TM Group.....</i>	<i>20</i>
<i>Office 365</i>	<i>20</i>
<i>Executive Reporting: Business Analyzer & BI360 Dashboards & Collaboration.....</i>	<i>20</i>
Our Vision 2015 Sponsors and Strategic Partners	21



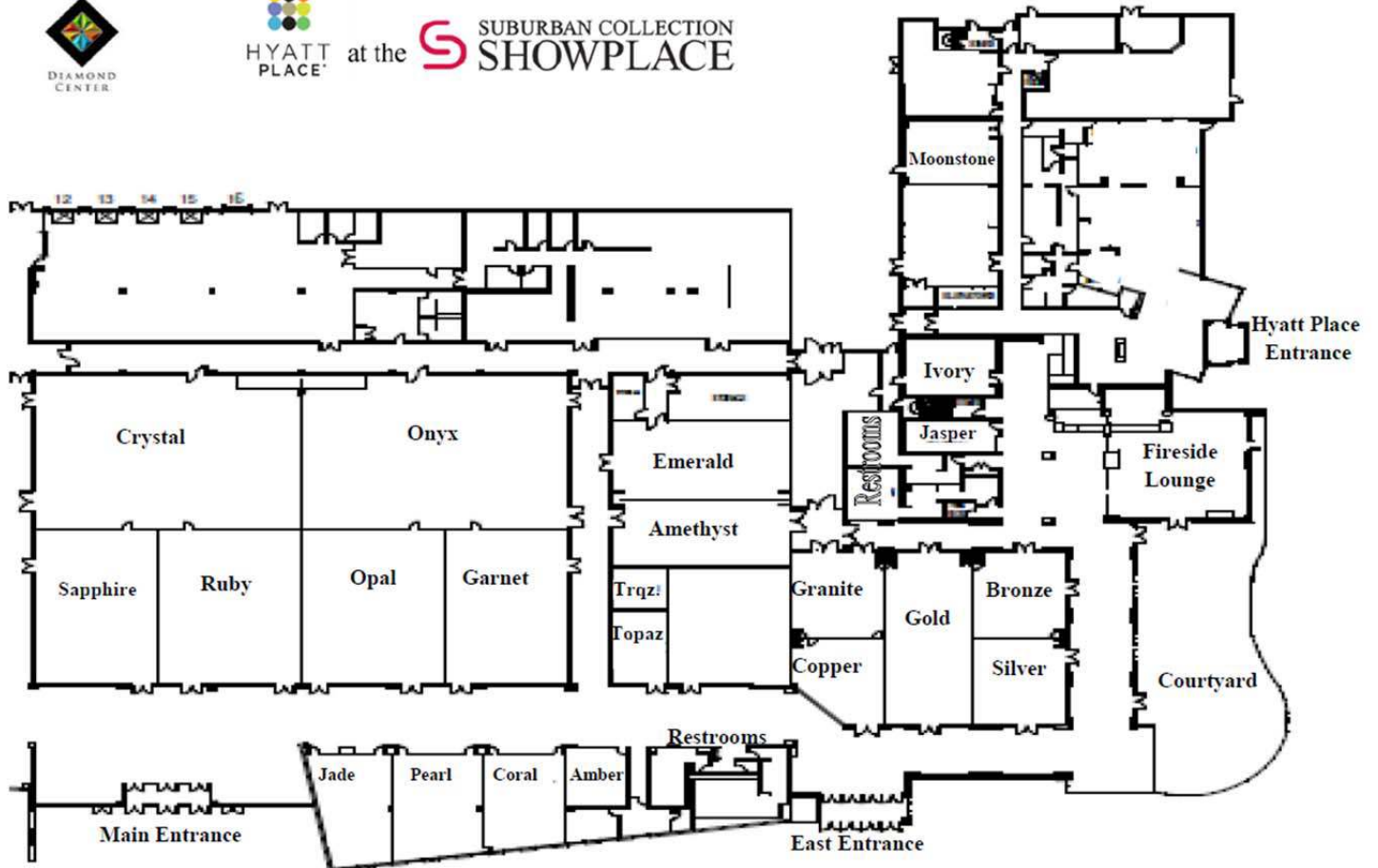
Vision Venue Map

Suburban Collection Showplace



at the

SUBURBAN COLLECTION
SHOWPLACE





Vision Agenda

Vision 2015 Agenda | May 12, 2015

Time	Session/Presenter		Room							
8:00-8:30am	Registration/Breakfast/Sponsor Showcase		Registration: Topaz Breakfast/Showcase:							
8:30-9:00am	Welcome, Judy Thomas, President, The TM Group		Onyx/Opal/Garnet							
9:00-10:00am	Keynote - Errol Schoenfish		Onyx/Opal/Garnet							
10:00-10:15am	Break									
10:15-11:30am	Future Directions Sessions		GP Onyx/Opal/Garnet		SL Jade	CRM Gold				
11:45-1:00pm	Lunch		Sapphire/Ruby/Crystal							
8:30am-5:00pm	Sponsor Hall Open Tech Team Tables		Sapphire/Ruby/Crystal							
Time	Session	Presenter	Room	GP	SL	CRM	IT	EXEC		
1:00-1:45pm	Document Management and Workflow	Altec/KwikTag/Metaviewer/PaperSave	Onyx/Opal/Garnet	X	X	X	X	X		
	Online Procurement, Expenses, & Sales Tax Automation	ReQlogic/Avalara	Gold	X	X	X	X	X		
	Upgrade Considerations including Hosting, Azure, and Web Deployment	TMG	Pearl	X	X		X			
	Analyzing Your CRM Data	TMG	Silver/Bronze			X	X			
	Who is The TM Group?	The TM Group	Jade	X	X	X	X	X		
1:45-2:00pm	Break									
2:00-2:45pm	Reporting: SmartLists, SmartList Builder, Excel Reports, SRS, BA	TMG/eOne	Onyx/Opal/Garnet	X				X		
	Budgets, Forecasting, Dashboards & FRx Replacement	TMG/Solver	Gold	X	X			X		
	Payroll, HR, ACA, Self Service, Benefits Portal	Greenshades/Integrity Data	Jade	X				X		
	Going Mobile: Mobility and Portals	TMG/CRM Vertex	Silver/Bronze	X		X		X		
	Office 365	Red Level Networks	Pearl	X	X	X	X	X		
2:45-3:00pm	Break									
3:00-3:45pm	Tips & Tricks Including Ask The Consultants	TMG	Onyx/Opal/Garnet	X				X		
	Helpful Tools for Dynamics GP & Microsoft CustomerSource & Licensing Processes	TMG	Coral	X						
	Client Showcase: Customization, Personalization and Integration Success Stories	TMG Dev	Copper	X		X		X		
	Tips & Tricks Including Quick Query, Upgrading to SL 2015 & Ask The Consultants	TMG/Plumbline	Jade		X		X			
	CRM Tips & Tricks	TMG	Silver/Bronze			X	X	X		
	Network & Data Security	Red Level Networks	Pearl				X	X		
	Executive Reporting: Business Analyzer & BI360 Dashboards & Collaboration	Solver	Gold	X	X	X	X	X		
3:45-4:30pm	Client Award Presentation Sponsor Giveaways - Banquet Hall - Onyx/Opal/Garnet									



Page Left Intentionally Blank



Opening General Sessions

Welcome by Judy Thomas, President of The TM Group

8:30 am

Join Judy as she kicks off Vision 2015 with a look at the day's activities and some observations from The TM Group's 32 year journey and our plans for the future. The Vision Conference 2015 is the culmination of 15 years of hosting TM Group's clients, prospects, sponsors and special guests, and Judy will share some of her unique thoughts on the opportunities available if you let "Vision" be your guide.

Keynote "Think Forward", Errol Schoenfish, Microsoft Dir. of Product Management **9:00 am**

Turbulent times always generate disruption and struggle as well as new opportunities. In the times of rapid market changes most companies put their focus on problem solving and survival. Fixing something that is broken may be necessary but growth requires innovation and adaptation to uncover new innovative options for growth. This session will explore the trends, barriers and strategies for generating innovation needed to break new ground for opportunistic business growth.



Join us at the Vision 2015 Keynote and meet Errol Schoenfish, Microsoft's talented Director of Product Management.

A native of Fargo North Dakota, Errol's 28-year career has been exclusively involved in the ERP software industry. Errol was the Director of Sales and Marketing for Microsoft Business Solutions Australia, leading the MBS sales and marketing strategies from 2001 to 2003. Before relocating to Sydney, Errol was based in Fargo where he was the Director of National and Global Accounts for Great Plains from 1999 to 2001 and previously worked with partners in Michigan, including The TM Group, as their Account Manager. From 2004-2006, Errol took a leadership role on the Microsoft Dynamics CRM strategy team. In his current position, Errol works with product development to drive Microsoft Dynamics GP strategy and cross-Microsoft product collaboration.

You are sure to enjoy Errol's important keynote about Microsoft's plans to deliver more compelling opportunities and business solutions for the next generation of computing – including the dramatic industry shifts taking place. You won't want to miss it!



Dynamics GP Track

GP 2015 Future Directions, Microsoft Corporation

10:15 am

Chad Sogge, Principal Group Program Manager at Microsoft



Errol Schoenfish, Director of Product Management, and Chad Sogge, Group Program Manager are responsible for driving the future direction and release of Microsoft Dynamics GP.

Chad is a Microsoft Dynamics GP Product Manager responsible for the future direction and product release of Dynamics GP 2015 R2. He started at Microsoft (formerly Great Plains) in 2002.



Chad and Errol will be illustrating how the power of what's possible and valuable drives the Microsoft Dynamics GP product vision and strategy. You'll see how Microsoft Dynamics GP 2015 gives you more insight into the business, provides more depth of functionality and helps you collaborate with others easier. Join them in this session as they unveil Microsoft Dynamics GP 2015 R2 and discuss some of the innovation coming in GP Next.

Document Management and Workflow

1:00 pm

Altec, ImageTag, Metaviewer and PaperSave

Going green is a big drive today as companies are realizing tremendous benefits with paperless document management solutions. In this session, we'll explore four solutions and their integration to Microsoft Dynamics GP, Dynamics SL and Dynamics CRM. Each of these publishers has special functionality within their solutions designed to "wow" our clients and they will be participating in a product showcase to give you a glimpse into the possibilities of document management and workflow.

Upgrade Considerations including Hosting, Azure, and Web Deployment

1:00 pm

The TM Group

Wondering what's next in GP or SL and how to get from here to there? Well this session is designed to tell you how we go about assessing an upgrade for our clients as well as all the system considerations you need to know before you make the decision to move. We will discuss the latest hardware requirements for on-premise software installations, web deployment of the software and, our latest offering, TMGiCLOUD for hosting of your software. You will walk away from this session better prepared to make the decision on how you want to deploy the next versions of the software.



Online Procurement, Expenses and Sales Tax & Certificate Automation Avalara and ReQlogic

1:00 pm

This session represents the most requested and advanced solutions of their kind available for Dynamics GP and SL. Every one of our clients is a candidate for every one of these products and technologies. You just have to see this session to understand how this can really streamline and improve your business and your productivity. The TM Group is also a user of each of these solutions and will be on-hand to make sure you understand how these can help you.

Sales Tax automation and reporting solutions from Avalara:

- The Sales and Use Tax Challenge
- Elements of End-to-End Compliance
- Avalara Sales Tax Compliance Solutions
- Avalara Returns: Precise, Timely Filing and Remittance
- Avalara CertCapture: Exemption Certificate Management
 - *Online collection*
 - *Certificate verification*
 - *Digital storage and accessibility*
 - *Transaction association for each certificate*
 - *Expiration and upcoming renewal notification*

Expense, Requisition and Time Entry portal solutions from ReQlogic:

- Automate your purchasing and employee expense cycles
 - Requisition Processing
 - Expense Processing
 - Invoice Approvals
- Submit and review anytime, from anywhere
 - Mobile Device Integration
- Ensure Sarbanes-Oxley compliance
- Advanced and Unlimited Workflow Rules
- Online Receiving
- Budgeting and Contracts
- PunchOut - Vendor Catalog Connector
- SharePoint Integration



Budgets, Forecasting, Dashboards & FRx Replacement Solver & The TM Group

2:00 pm

Attend this session and learn why our customers agree that BI360 is the perfect FRx and Management Reporter replacement for companies looking for the next-generation reporting and budgeting solution. BI360 offers a solution with capabilities that include Excel and web-based reporting, budgeting, dashboards and a pre-configured data warehouse. Use the entire suite or mix and match the modules you need.

In this session, Solver will be showcasing:

- Integrated Business Intelligence Suite: Reporting, Budgeting, Dashboards & Data Warehouse
- Both Excel and Web-based platforms
- Presentation Quality Excel Formatting
- Drag-and-Drop Report Design

Out-of-the-box integration to Microsoft Dynamics (GP, SL, NAV and CRM)

Payroll, HR, ACA and Employee Self Service & Benefits Portal The TM Group, Greenshades, Integrity Data

2:00 pm

This session will focus on several of our sponsor products including the **Greenshades File and Pay Tax Service and ACA Reporting** and the **Integrity Data line of payroll and HR add-on products and the U-Linc Workflow product**. If you are currently using the Human Resources/Payroll series, or are just considering using this functionality, you need to attend this session. We will also discuss year-end processing!

Some of the topics covered in this session:

- **Tips & Techniques:** Bring your questions so we can help you with those hard-to-find answers.
- Enhance your Payroll and HR experience with Integrity Data
- How to quickly fix time entry mistakes
- Easily e-mail employee earnings statements to employees directly from Dynamics GP
- Quickly answer employee “what-if” pay questions
- Manage all types of leave within Dynamics GP
- Greenshades integration with Dynamics
- How clients see their upcoming filings and payment, and possibility of “reminder notifications” and how they would set them up
- Then how clients use Greenshades Payroll Tax Service to submit filings and payment, how the service could benefit them
- How clients make edits to filings or payments using this service
- How clients view historical filings and payments within Greenshades Payroll Tax Service
- Lastly we will open the floor for questions from any of your participants



SmartLists, SmartView, SmartList Builder, Excel Reports, SSRS, & Business Analyzer 2:00 pm ***The TM Group GP, Special Guest***

Dynamics GP Reporting – Are you overwhelmed by all the reporting options in Dynamics GP? Learn how to unleash the data from Dynamics GP with the many reporting tools: SmartLists, SmartList Builder, Excel Reports, SSRS (SQL Server Reporting Services), Business Analyzer and so much more. This session will provide an overview of tools that can provide you with ad-hoc queries, transactional reports, financial statements, key performance indicators, and even dashboards. The best part - you probably already own these tools and don't even know it. The session will begin with a brief discussion of how to decide which reporting tool fits your needs best by reviewing the key decision points. We will focus on reviewing some of the pros and cons of each tool, as well as the types of users best suited for each. Demonstrations in GP 2015 will show the various tools and highlight new functionality available in this release.

GP Tips & Tricks 3:00 pm ***The TM Group Dynamics GP Consulting Team***

Whether you consider yourself an advanced, intermediate, or a beginner, we have Dynamics GP Tips & Tricks for everyone! Learn some 'new' features and tips – here are a few samples of takeaways you can start using immediately: using custom source documents to speed your financial month-end processes, recording macros for repetitive tasks, creating custom shortcuts for your Dynamics GP homepage and building custom help with window notes. You don't want to miss this!

Helpful Tools for Dynamics GP & Microsoft CustomerSource & Licensing Processes 3:00 pm ***Kim Keller & Judy Thomas, The TM Group, Craig Hogan, Microsoft Corporation***

Join us for this information-packed session about licensing processes, including transitions to Perpetual Licensing. Also covered will be loads of information regarding your benefits including CustomerSource and the wealth of information it contains. Professional Services Tools will also be discussed and the method for getting this no-cost set of utilities.

Client Showcase: Customization, Personalization & Integration Success Stories 3:00 pm ***The TM Group Development Team***

Have you taken your system as far as you can? Please join the TMG Development team to review tools and technologies that can extend your system to better meet your business needs. Through integrations, reporting, extensions, and custom development, the TMG Development team will showcase working concepts.



Dynamics SL Track

SL Future Directions

10:15 am

Plumblin Consulting

Did you know the first update for Microsoft Dynamics SL 2015 has already released and it includes new features?! It is time for you to get up to speed and start planning your upgrade to Microsoft Dynamics SL 2015 and SL 2015 Web Apps. Join this session to learn what's new in Microsoft Dynamics SL 2015. You'll also learn about the new way to access Microsoft Dynamics remotely through the Microsoft Dynamics SL Web Apps.

- Microsoft Dynamics SL 2015 enhancements in:
 - Reporting
 - Financials
 - Project
 - Payroll
- Microsoft Dynamics SL 2015 CU1 web apps:
 - Project Time & Expense Entry
 - Project Approvals
 - Project & Employee Maintenance
 - Project Analysis
 - Resource Management
 - Item Request Entry & Approval
 - Payroll time entry
 - Web based reporting
 - Quick Query
 - Communicator

Upgrade Considerations including Hosting, Azure, and Web Deployment

1:00 pm

The TM Group

Wondering what's next in SL or GP and how to get from here to there? Well this session is designed to tell you how we go about assessing an upgrade for our clients as well as all the system considerations you need to know before you make the decision to move. We will discuss the latest hardware requirements for on-premise software installations, web deployment of the software and, our latest offering, TMGiCLOUD for hosting of your software. You will walk away from this session better prepared to make the decision on how you want to deploy the next versions of the software.



Document Management and Workflow *Altec, ImageTag, Metaviewer and PaperSave*

1:00 pm

Going green is a big drive today as companies are realizing tremendous benefits with paperless document management solutions. In this session we'll explore four solutions and their integration to Microsoft Dynamics GP, Dynamics SL and Dynamics CRM. Each of these publishers has special functionality within their solutions designed to "wow" our clients and they will be participating in a product showcase to give you a glimpse into the possibilities of document management and workflow.

Online Procurement, Expenses and Sales Tax & Certificate Automation *Avalara and ReQlogic*

1:00 pm

This session represents the most requested and advanced solutions of their kind available for Dynamics GP and SL. Every one of our clients is a candidate for every one of these products and technologies. You just have to see this session to understand how this can really streamline and improve your business and your productivity. The TM Group is also a user of each of these solutions and will be on-hand to make sure you understand how these can help you.

Sales Tax automation and reporting solutions from Avalara:

- The Sales and Use Tax Challenge
- Elements of End-to-End Compliance
- Avalara Sales Tax Compliance Solutions
- Avalara Returns: Precise, Timely Filing and Remittance
- Avalara CertCapture: Exemption Certificate Management
 - Online collection
 - Certificate verification
 - Digital storage and accessibility
 - Transaction association for each certificate
 - Expiration and upcoming renewal notification

Expense, Requisition and Time Entry portal solutions from ReQlogic:

- Automate your purchasing and employee expense cycles
 - Requisition Processing
 - Expense Processing
 - Invoice Approvals
- Submit and review anytime, from anywhere
 - Mobile Device Integration
- Ensure Sarbanes-Oxley compliance
- Advanced and Unlimited Workflow Rules
- Online Receiving
- Budgeting and Contracts
- PunchOut - Vendor Catalog Connector
- SharePoint Integration



Budgets, Forecasting, Dashboards & FRx Replacement

2:00 pm

The TM Group ERP Consulting Team

Attend this session and learn why our customers agree that BI360 is the perfect FRx and Management Reporter replacement for companies looking for the next-generation reporting and budgeting solution. BI360 offers a solution with capabilities that include Excel and web-based reporting, budgeting, dashboards and a pre-configured data warehouse. Use the entire suite or mix and match the modules you need.

In this session, Solver will be showcasing:

- Integrated Business Intelligence Suite: Reporting, Budgeting, Dashboards & Data Warehouse
- Both Excel and Web-based platforms
- Presentation Quality Excel Formatting
- Drag-and-Drop Report Design

Out-of-the-box integration to Microsoft Dynamics (GP, SL, NAV and CRM)

SL Tips & Tricks, Including Upgrading to SL 2015

3:00 pm

The TM Group Dynamics SL Consulting Team & Plumblne

Join us for this content-rich session as we showcase tips & tricks that can help you increase your usability and productivity of Microsoft Dynamics SL 2015. You will learn how processes and business tasks are made easier by improving interoperability, interface design, and usability. See how you can get more done with Dynamics SL 2015, in less time, with a familiar user experience and tools that make every activity easier and more organized.



Dynamics CRM Track

CRM Future Directions

10:15 am

Kevin Alexander and his Special Guests

Take a deep dive into the new capabilities of Microsoft Dynamics CRM 2015. See the enhanced native Microsoft Outlook and Microsoft Office user experience, real-time charting and dashboards, role-based forms and views, performance and process management, contextual SharePoint integration, enhanced customization tools. Microsoft Dynamics CRM 2015 is as much about empowering your users as it is your relationships.

Analyzing Your CRM Data

1:00 pm

The TM Group Dynamics CRM Consulting Team

Analyzing Your CRM Data – Learn the best practices and tips to leverage CRM's advanced finds, charts, dashboards, and report wizard. How Excel and Power BI raise your reporting analysis to the next level.

Document Management and Workflow

1:00 pm

Altec, ImageTag, Metaviewer and PaperSave

Going green is a big drive today as companies are realizing tremendous benefits with paperless document management solutions. In this session we'll explore four solutions and their integration to Microsoft Dynamics GP, Dynamics SL and Dynamics CRM. Each of these publishers has special functionality within their solutions designed to "wow" our clients and they will be participating in a product showcase to give you a glimpse into the possibilities of document management and workflow.

CRM Mobility and Portals

2:00 pm

Matt Bitzegaio, CRM Vertex

Going Mobile – Today's mobile first world requires information from business systems to be delivered in a meaningful way to both external and internal users. We will take a look at mobile delivery solutions for CRM and you will be surprised what is available natively.

CRM Tips & Tricks, Including Upgrading Your CRM

3:00 pm

The TM Group Dynamics CRM Consulting Team

Maximize your use of CRM learning navigation tips, business form data entry rules, quick data entry tips, and workflows.



Advanced IT Track

Upgrade Considerations including Hosting, Azure, and Web Deployment

1:00 pm

The TM Group

Wondering what's next in GP or CRM and how to get from here to there? Well this session is designed to tell you how we go about assessing an upgrade for our clients as well as all the system considerations you need to know before you make the decision to move. We will discuss the latest hardware requirements for on-premise software installations, web deployment of the software and, our latest offering, TMGiCLOUD for hosting of your software. You will walk away from this session better prepared to make the decision on how you want to deploy the next versions of the software.

Office 365

2:00 pm

David King, Red Level Networks

As a modern business, you have a unique set of needs to service customers, grow your business, and remain competitive. Come learn how Office 365 can unlock the potential of your business.

- Give your team virtually “anywhere access” to the latest Office applications and benefit from cloud-based IT services like enterprise-grade e-mail and team sites.
- Gain deeper customer insights by combining data using Excel, Microsoft Dynamics, CRM Online and Power BI.
- Keep everyone in sync with e-mail and shared calendars they can access at their desk or on the go.
- Connect immediately or set up and host online meetings with multi-party HD video conferencing, real-time note taking, and screen sharing.
- Collaborate with teammates, partners, and customers with documents that are always up to date and accessible from almost anywhere.

You'll leave this session with a deeper understanding of how Office 365 can help you reach your business goals. All attendees will receive a special invitation to attend a lunch and learn at Red Level Networks. The session will cover a full “Microsoft Experience” session where we'll take a deeper dive and demo approach to the content covered in this session.



Advanced Network & Data Security

3:00 pm

David King, Red Level Networks

Nearly 70% of people use personal devices in the workplace, regardless of the company's official "Bring Your Own Device" (BYOD) policy. The challenge with this is many companies simply aren't ready to manage the security threat BYOD brings into the IT environment. Learn about the challenges and barriers facing a secure BYOD deployment in your workplace.

- Identify the risks of not having a strong strategic direction and policy for BYOD
- Identify the risks associated with privacy and security for a BYOD program
- Craft an audit program for reviewing the controls surrounding a BYOD program
- Review a framework for discussing the risks of BYOD with management

You'll leave this session with a better understanding of the main security risks surrounding your mobile device program. You will also uncover potential steps to address these risks based on your organization's current and most urgent challenges.



Executive Track

Who is The TM Group

1:00 pm

Ken Jacobsen, VP of Business Development, The TM Group

Join Ken for this presentation about The TM Group – our history, accomplishments and methodologies. This session is a perfect refresher for existing clients and a great introduction for our prospective clients.

Office 365

2:00 pm

David King, Red Level Networks

As a modern business, you have a unique set of needs to service customers, grow your business, and remain competitive. Come learn how Office 365 can unlock the potential of your business.

- Give your team virtually “anywhere access” to the latest Office applications and benefit from cloud-based IT services like enterprise-grade e-mail and team sites.
- Gain deeper customer insights by combining data using Excel, Microsoft Dynamics, CRM Online and Power BI.
- Keep everyone in sync with e-mail and shared calendars they can access at their desk or on the go.
- Connect immediately or set up and host online meetings with multi-party HD video conferencing, real-time note taking, and screen sharing.
- Collaborate with teammates, partners, and customers with documents that are always up to date and accessible from almost anywhere.

You’ll leave this session with a deeper understanding of how Office 365 can help you reach your business goals. All attendees will receive a special invitation to attend a lunch and learn at Red Level Networks. The session will cover a full “Microsoft Experience” session where we’ll take a deeper dive and demo approach to the content covered in this session.

Executive Reporting: Business Analyzer & BI360 Dashboards & Collaboration Solver

3:00 pm

Explore the latest BI360 version with market-leading Excel and Web-based Reporting, Dashboards and Budgeting modules which give both Excel, web-based and mobile-based interfaces. Whether you are looking for user-friendly financial reports for your GL and sub-ledger data, consolidations, dashboard analysis or to automate your budgeting and forecasting processes, or looking to add data outside of Dynamics available for reporting and dashboards, this session will give you great ideas to put your organization on the right Business Intelligence path.



Our Vision 2015 Sponsors and Strategic Partners



Come learn about the new **Forms Printer Plus** where we've brought Forms Printer's integration of Crystal Reports, SSRS and Emailing to EVERY window in GP. Also hear about our other products. **BI Reporting:** data for reports and queries in office productivity applications. **ZipAssist:** point of entry and mass update address verification.

For more information, please visit <http://www.accountable.com/>



TitaniumGP enables users to save time and reduce errors by bringing the ease of "copy/paste" to Dynamics GP. Users can paste multiple lines or multiple documents in a single operation to about 35 different GP Windows. And Elastic Windows gives you the ability to add fields to GP windows and even link to information from other databases. To make GP more productive, TitaniumGP is available full feature for the Fabrikam database.

For more information, please visit <http://www.advtrex.com/titaniumgp>



Altec is a leading provider of Integrated Document Management (IDM) solutions to mid-market companies. For over 30 years, Altec has provided a wide range of paper to paperless solutions including its Certified for Microsoft Dynamics (CfMD) flagship product, *doc-link™*, enabling companies to capture, archive, workflow and route structured and unstructured documents to customers, employees and vendors.

For more information, visit www.altec-inc.com



Appolis WithoutWire™ Warehouse Management (WMS) Solution provides efficient inventory and process optimization for distribution and manufacturing organizations looking for more robust lot/serial tracking of inventory. Receiving, Cycle Counts, Min/Max Replenish and Pick/Pack/Ship. Ask us about Microsoft Azure Cloud enabled, smartphone and tablet mobility and our Field Service application.

For more information, please visit www.appolis.com



Avalara is the leading provider of cloud-based sales and use tax management solutions. Avalara's end-to-end offering is seamlessly integrated and Certified for Microsoft Dynamics (CfMD). Avalara provides accurate sales tax calculation, painless exemption certificate management, and effortless sales tax filing and remittance. Avalara makes sales tax less taxing!

Avalara Presents:

AvaTax Calc – Fully integrated. Always accurate.

AvaTax Certs - Create and access exemption certificates on demand

AvaTax Returns – Automatically file and remit on time, every time

For more information, please visit www.avalara.com.



Over a thousand customers rely on Binary Stream products to solve a range of complex and time consuming accounting challenges including: multiple entity management, property lease management, configurable subscription billing and deferrals and healthcare material management. Binary Stream is proud to have been a TMG partner for over 15 years.

For more information, please visit www.binarystream.com.



Blue Moon is a leading ISV for Dynamics GP. We provide critical accounting and distribution functionality such as credit card processing, manifest entry and tracking, consignment tracking, chargeback tracking and processing, and invoice automation. Our Operations Core module provides seamless warehouse management and EDI integration, and many distribution workflow improvements.

For more information, please visit <http://bluemoonind.com/>



ClickDimensions is the top-rated, award-winning, Microsoft-certified email marketing and marketing automation solution for Microsoft Dynamics CRM. Providing email marketing, web intelligence, lead scoring, campaign tracking, forms, surveys, and more, ClickDimensions can streamline your marketing program by gaining insights about your leads and contacts, resulting in reduced costs and increased revenue.

For more information, please visit www.clickdimensions.com



CRM Vertex is a customer self-serve portal solution for Microsoft Dynamics CRM which is designed for fast and easy deployment and configuration. Optimized for desktop, tablet and mobile devices, CRM Vertex utilizes core CRM functionality to provide immediate value and a rich portal experience. In this age of the customer, self-serve has become an expectation.

For more information, please visit www.crmvertex.com



eOne Solutions is the creator of smart, configurable, and integrated software tools for business platforms and web services including Microsoft Dynamics GP, CRM, and Salesforce.com. Founded in 2001, eOne has a family of seven flagship products (including SmartConnect, Extender, SmartList Builder, SmartView and more) specifically designed to enable business users with the easiest way to view, automate, report, and take action on information.

For more information, please visit www.eonesolutions.com



Fastpath is a leader in security, audit and compliance specializing in segregation of duties reviews, audit trails and security provisioning. Fastpath ensures our Dynamics GP, NAV, SL, AX and CRM customers can confidently answer these two critical questions: Who has access to their systems? What did they do with that access?

For more information, please visit <http://www.gofastpath.com/>



Greenshades Software handles the headaches that come along with running payroll so our clients can focus on more important things. We have spent the last decade filing payroll taxes, providing employee self-service portals, and meeting many other needs. We pride ourselves in our client care: we provide absolutely free technical support, will customize our solutions to fit your exact needs, and offer money-back guarantees that ensure our clients are completely satisfied. Most of our solutions work by integrating directly into the accounting systems that are already in place, such as the Microsoft Dynamics line, increasing the value of software you already own.

For more information, please visit www.greenshades.com.



way you want and need it to.

Integrity Data is committed to creating great Microsoft Dynamics® GP Payroll experiences for millions of you by offering reliable solutions: quality software, top-notch support and expert services. Integrity Data's experienced team makes sure that you feel confident that your payroll system works exactly the

For more information, please visit www.integrity-data.com.



k-eCommerce is dedicated to developing integrated eCommerce and ePayment solutions for Microsoft Dynamics GP, NAV and CRM. Solutions include B2B, B2C and sales portal / customer service websites that are mobile-optimized through responsive web design, PA-DSS Certified credit card / ACH processing and an online bill pay portal.

For more information, please visit www.k-ecommerce.com



KwikTag is a document management platform which embeds within ERP systems to provide rapid document access and powerful workflow capabilities designed to automate any document-burdened process or department. Unlike any other document management system, the KwikTag platform offers KwikApps, which are packaged workflow applications designed to automate any business processes and more.

For more information, please visit www.kwiktag.com



A leader in automated business form distribution tools for Microsoft GP, NAV and SL. Use your existing reports and print procedures. Batch email & fax, built-in archiving and attach static and variable attachments (outstanding invoices to Statements) Distribute to customers, vendors, salespeople, warehouses, management based on rules easily created at initial setup.

For more information, please visit www.liaisonsc.com



mc² has been developing Microsoft Dynamics GP add-on products for over 25 years.

GP Agent schedules and automates daily tasks such as Posting, Routines, Maintenance, Reports, Emailing Invoices and EFT documents.

Advanced Intercompany Transactions manages multi-company, multi-entity transactions in all Dynamics GP modules. Features include cross-company drill-backs, allocation formulas, voids, and post through.

For more information, please visit
<http://support.mc2software.com/products/default.aspx>



Mekorma MICR is designed to improve efficiency and simplify your payment processing. MICR Check Printing provides security for your checks and EFTs. Our Check Selection Plan can help with batch creation and Multi-Batch Print and Post will allow you to process all your check and EFT batches across companies from one screen.

For more information, please visit www.mekorma.com.



Get off the paper trail and onto the Fast Track with MetaViewer Paperless ERP.

Paper shuffling can complicate processing and lead to inefficiencies and errors. MetaViewer is a proven solution for automating the processes of AP, AR, and HR. "Paperless ERP" from MetaViewer can bring control and visibility to your organization and help leverage your investment in Microsoft Dynamics.

For more information, please visit <http://www.metaviewer.com/for-microsoft-dynamics>.



Need more recruiting functionality? Add myStaffingPro applicant tracking system to the front-end of Microsoft Dynamics to achieve a seamless applicant to employee experience. With myStaffingPro, you can recruit, qualify, track, and hire the best employees. The scalable system can be configured to any company's size, budget, or process.

For more information, please visit <http://mystaffingpro.com>



Nolan has over 25 years of experience in developing Dynamics GP solutions, which include:

- Advanced Bank Reconciliation - Automatically reconciles posted GL transactions, without the need of Checkbooks, to the imported bank statement (CSV or BAI).
- InterCompany Postings - Auto-posts and auto-voids intercompany transactions in the Destination Companies, with a superior drill-back capability.
- IC POP to SOP - Creates intercompany trading relationships, ideal for related companies that buy and sell inventory items between GP databases.

For more information, please visit www.nolanbusinesssolutions.com.



Add efficiency and visibility to your inventory and fixed asset tracking with PanatrackerGP. This suite of solutions extend Dynamics GP to mobile devices to capture transactions and access information at the point and time items are handled. Real-time validation eliminates errors and single point capture removes duplicated and delayed entry.

For more information, please visit www.panatrack.com.



PaperSavePro™ is a Certified for Microsoft Dynamics document management and electronic workflow solution. The system eliminates inherent risks associated with paper, while eliminating the 20-30% of your employee's workday that is spent filing, searching and retrieving paper information. The seamless integration with Microsoft Dynamics, SharePoint, Microsoft Office and Microsoft Outlook enables you to retrieve documents directly from a Microsoft Dynamics record, pull a group of documents from a Query tool like SmartList, and search content on document and meta-data. PaperSavePro works the way you do by offering 7 methods of capturing documents.

For more information, please visit www.PaperSavePro.com.



Plumblin Consulting is the premier resource for Dynamics Partners and ISVs needing just-in-time support services. From help desk to software development and implementation support, Plumblin Consulting delivers 25+ years of Dynamics experience under your brand to enhance and expand your service offerings. We're committed to your long term success.

For more information, please visit www.plumblinconsulting.com.



Professional Advantage is a Gold Certified Microsoft Partner, and offers cross-industry enhancement solutions built on Microsoft Dynamics® GP, CRM, and RMS. A couple solutions include: Company Data Archive (CDA) and Collections Management. Collections Management has the processing power to improve cash flow, diminish collection time, and reduce bad debt.

For more information, please visit www.profad.com.



Red Level is a full service technology consulting firm that provides enterprise-grade solutions to growing businesses throughout the Midwest. Red Level leverages game-changing technologies to help businesses run more smoothly, increase profitability, and solve strategic business issues.

With a team of more than 30 specialists and more than 200 years of combined experience, Red Level holds over 100 key certifications from Microsoft, Dell, Cisco, VMware, DataCore, HP, Citrix and other leading companies.

For more information, please visit www.redlevelnetworks.com



RedTail Managed EDI Cloud Service means Freedom to Do Business. We handle EDI. You concentrate on core strengths. RedTail enables suppliers in retail, grocery, and medical products supply chains to optimize trade compliance for both sell- and buy-side. RedTail integrates with Microsoft Dynamics GP and NAV, WMS, and 3PL systems.

For more information, please visit <http://redtailsolutions.com/>



Reporting-Central is the recognized industry expert at ensuring data integrity and enabling Dynamics GP users to achieve a “single version of the truth”. As a dedicated Independent Solution Vendor (ISV), we specialize in several critical areas, including reconciliations, system set-up validation and data validation. We achieve this success through our award winning product lines – **The Closer** and **The Validator**. Our main product is The Closer; the only tool that automates the process of reconciling sub-ledgers to the General Ledger. Our goal is to make Microsoft Dynamics GP® a better business solution for the entire community.

For more information, please visit www.reporting-central.com.



ReQlogic, for Microsoft Dynamics delivers powerful browser-based functionality to drive eProcurement, requisitions, invoices, expense reports, and time tracking throughout your business, powering efficiency and controlling costs. With over 40,000 users worldwide, ReQlogic has the functionality, the in-market experience and the support services you need to add value to your Microsoft Dynamics environment.

For more information, visit www.reglogic.com.



Are you ready to work simpler & easier®? Extend the power of Microsoft Dynamics GP with tools—SmartFill, Auditor, Dynamics GP Toolbox, Dynamics Report Manager, and Omni Price—that will rock your world.

For more information, please visit www.rocktonsoftware.com



Give your business the Ultimate Edge with SalesPad. SalesPad, LLC provides the premier add-on to Microsoft Dynamics GP and delivers easy-to-use tools to enhance your experience. SalesPad gives you inventory, sales, management, and customer interaction software all in one powerful tool.

For more information, please visit www.salespad.net.



Scribe is a provider of solutions that brings data anywhere it's needed – regardless of IT infrastructure. Scribe's award-winning products help 12,000 customers and 1,200 partners use data – cloud-based, on-premise or a mix – to increase revenue, provide superior service, and create business value.

For more information, please visit www.scribesoft.com/hero_microsoft



Solver's BI360 solution is a powerful and intuitive suite of modules for reporting, consolidations, budgeting, dashboards, and data warehousing. BI360 gives the entire organization the ability to truly understand their data, make better decisions, and ultimately drive efficiency and performance in their business.

For more information, please visit www.solverusa.com.