

Acumatica

Summit 2022

User Group SE



CONFERENCE BOOKLET

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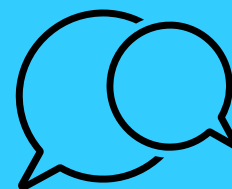


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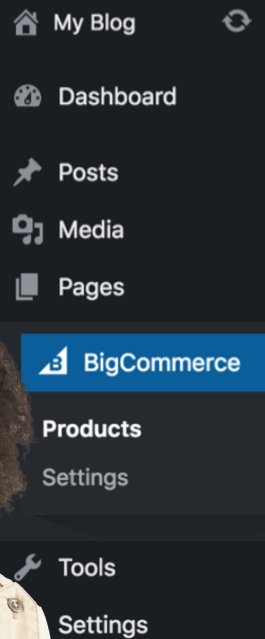
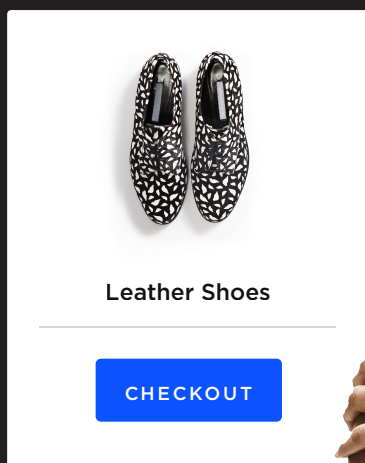


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Seamlessly synchronize ecommerce data with your business management software.

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**VISIT US AT THE
BIGCOMMERCE BOOTH**



AGENDA

September 12, 2022 | Day 1

7:30 AM -
8:30 AM

Breakfast | Grand Ballroom Foyer

Start the day off with breakfast and a chance to network with fellow attendees and our sponsors.

8:30 AM -
9:00 AM

Welcome | Grand Ballroom A

- Opening remarks
- Thank you to our sponsors
- How to make the most of the AUG event
- How to Connect to Discussion topic forum hosted by Acumatica
- Resources available to customers
- Expo overview

9:00 AM -
9:30 AM

Acumatica 2022 R2 and Road Map Insights | Grand Ballroom A

Presented by Debbie Baldwin

Learn about the Acumatica Road Map and get a sneak peek at some of the Acumatica 2022 R2 feature highlights.

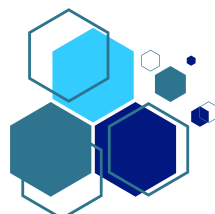
9:30 AM -
10:30 AM

Acumatica Awareness Training 1 | Grand Ballroom A

Presented by Seth Kuhn & John Shepperson

This one-hour session will show you key techniques for improving your Acumatica usage to help you automate and enhance visibility into your business. Each lesson will be 20 minutes.

- **Lesson 1:** AP document recognition – 3 ways of processing
 - **Lesson 1a:** System email accounts
- **Lesson 2:** Bank feeds for bank and CC reconciliation
- **Lesson 3:** Bank feeds for advanced expense management



AGENDA

September 12, 2022 | Day 1

9:30 AM -
10:30 AM

Developer Community Session 1 | The Grand Ballroom

Presented by Brian Stevens, CRL

This session, led by Acumatica developer community members, is designed to give developers a chance to interact, share, and learn.

10:30 AM -
11:00 AM

Morning Break & Expo | Grand Ballroom A

Mix and mingle with the Acumatica community while enjoying a beverage and a snack to keep you going throughout the day.

11:00 AM -
12:00 PM

Acumatica Awareness Training 2 | Grand Ballroom A

Presented by James Stange & Craig Andrew Smith

This one-hour session will show you key techniques for improving your Acumatica usage to help you automate and enhance visibility into your business. Each lesson will be 20 minutes.

- **Lesson 1:** Build a GI and make it a side panel then deploy to mobile app
- **Lesson 2:** Build a GI and make it a dashboard and use DB and GI as side panels then deploy to mobile app
- **Lesson 3:** Create mobile workspaces and KPI's

11:00 AM -
12:00 PM

Developer Community Session 2 | The Grand Ballroom

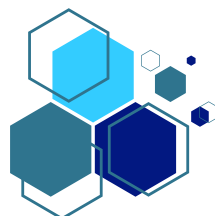
Presented by Brian Stevens, CRL

This session, led by Acumatica developer community members, is designed to give developers a chance to interact, share, and learn.

12:00 PM -
1:30 PM

Lunch & Expo | The Grand Ballroom

Enjoy lunch and take time to socialize while browsing the vendor expo. Be sure to visit all the booths for a chance to be entered into our raffle!



AGENDA

September 12, 2022 | Day 1

12:15 PM -
11:15 PM

Keystone Sponsor Presentation | The Grand Ballroom

We are grateful to our Keystone sponsors for providing additional support to the Acumatica community.

Please attend the presentation and meet with our Keystone Sponsors to show your appreciation.

1:30 PM -
3:30 PM

Customer Panel | Grand Ballroom A

Presented by Sean Reeves, Taylan Sevimli, Brett Nothan, & Ryan Gilreath

While answering questions from the Acumatica community, the Acumatica Customer Panel will share their Acumatica success story as well as their company metrics as a baseline for their success. Learn what worked and what didn't for these customers on their Acumatica journey.

3:30 PM -
4:00 PM

Afternoon Break & Expo | The Grand Ballroom

Mix and mingle with the Acumatica community while enjoying a beverage and a snack to keep you going throughout the day.

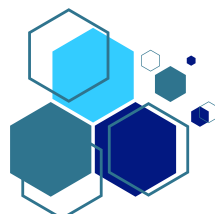
4:00 PM -
5:00 PM

Acumatica Awareness Training 3 | Grand Ballroom A

Presented by Steve Gignac & Joe Santoro

This one-hour session will show you key techniques for improving your Acumatica usage to help you automate and enhance visibility into your business. Each lesson will be 20 minutes.

- **Lesson 1:** Personalizing your workspace and managing your profile
- **Lesson 2:** Modify a standard report, setup a template, and schedule the report to send via email
- **Lesson 3:** Managing widgets on dashboards



AGENDA

September 12, 2022 | Day 1

4:00 PM -
5:00 PM

Developer Community Session 3 | The Grand Ballroom

Presented by Brian Stevens, CRL

This session, led by Acumatica developer community members, is designed to give developers a chance to interact, share, and learn.

5:15 PM -
5:30 PM

Reception Welcome

Opening remarks and sponsor appreciation

5:30 PM -
6:00 PM

Keystone Sponsor Presentation | The Grand Ballroom

We are grateful to our Keystone sponsors for providing additional support to the Acumatica community.

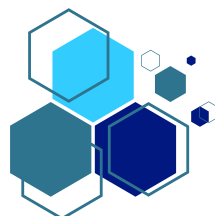
Please attend the presentation and meet with our Keystone Sponsors to show your appreciation.

5:00 PM -
9:00 PM

Expo Reception | The Grand Ballroom

Enjoy beer, wine, appetizers, and dinner as you mingle amongst the Acumatica community.

Thank you to our expo sponsors for making this wonderful event possible.



PAYROLL | PEOPLE | TIME



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“Overall, the implementation was as smooth as it could be, which means a lot! The support has been solid, and the customer service was on point. This has been a very good investment.”

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Velixo 

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Bring real-time data from Acumatica to Excel with one click.

Smart Drilldown
Click on any cell in your spreadsheet and go to the source transaction in Acumatica.

Schedule a demo today!
 1-855-5-VELIXO  sales@velixo.com
 www.velixo.com

AGENDA

September 13, 2022 | Day 2

7:00 AM -
8:00 AM

Breakfast | Mezzanine Foyer

Start the day off with breakfast and a chance to network with fellow trainees.

8:00 AM

Introduction to Acumatica Generic Inquiries and Dashboards | Peachtree

Presented by Tim Rodman

Acumatica Generic Inquiry is a powerful reporting solution that allows users to define data outputs. The data outputs can then be used to generate dashboards, pivot tables, and side panels.

This course will cover the basics of creating Generic Inquiries as well as an understanding of the tool's options and features.

8:00 AM -
12:00 PM

Acumatica AP Document Recognition Basics | Ansley

Presented by Sharon Conkey

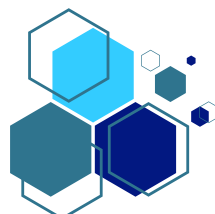
Acumatica AP Document Recognition automates the reading and recording of AP documents, which can be fed into the system in a variety of ways.

This course will cover the basics of configuring AP Document Recognition and submitting documents for recognition. Discussion topics will include the various methods for submitting documents, monitoring, and troubleshooting.

10:00 AM -
10:30 AM

Morning Break | Mezzanine Foyer

Stretch your legs and grab a snack!



AGENDA

September 13, 2022 | Day 2

8:00 AM -
12:00 PM

Acumatica Business Events Basics | Vinnings

Presented by Megan Perry

Users can configure Acumatica Business Events to monitor actions, data changes, or conditions. When those actions, data changes, or conditions are met, the system can take a specific user-defined action automatically and without user intervention.

This course will cover the fundamentals of Business Events, such as setup and discussion of the various types of events and actions.

1:00 PM -
5:00 PM

Acumatica Bank Feeds Basics | Vinnings

Presented by Sharon Conkey

Acumatica Bank Feeds connects your Acumatica instance to over 14,000 financial institutions and allows you to import transactions for processing.

This course will go over the basics of setting up Bank Feeds for the import of bank transactions. Options for importing and processing additional transaction types will be discussed.

1:00 PM -
5:00 PM

Acumatica Workflows Basics | Ansley

Presented by Megan Perry

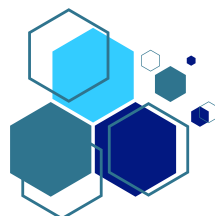
Acumatica provides standard processing workflows that control the status of a document. Users can configure alternate or additional workflows using the Acumatica Workflow Engine based on standard status fields or user defined fields.

This course will cover the basics of workflows, from creation to modification.

2:00 PM -
2:30 PM

Afternoon Break | Mezzanine Foyer

Stretch your legs and grab a snack!





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AGENDA

September 14, 2022 | Day 3

7:00 AM -
8:00 AM

Breakfast | Mezzanine Foyer

Start the day off with breakfast and a chance to network with fellow trainees.

8:00 AM

Advanced Acumatica Generic Inquiries and Joins | Peachtree

Presented by Tim Rodman

Acumatica Generic Inquiry is a powerful reporting solution that allows users to define data outputs. The data outputs can then be used to generate dashboards, pivot tables, and side panels.

This course builds on the Introduction to GI's and Dashboards by introducing advanced functions of combining multiple data objects and ensuing proper data joins.

8:00 AM -
12:00 PM

Acumatica Bank Feeds Basics | Vinnings

Presented by Sharon Conkey

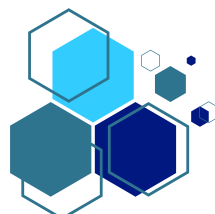
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10:00 AM -
10:30 AM

Morning Break | Mezzanine Foyer

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AGENDA

September 14, 2022 | Day 3

8:00 AM -
12:00 PM

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Acumatica Business Events Basics | Ansley

Presented by Megan Perry

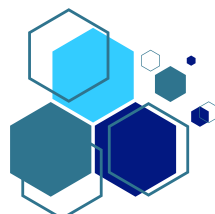
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2:00 PM -
2:30 PM

Afternoon Break | Mezzanine Foyer

Stretch your legs and grab a snack!



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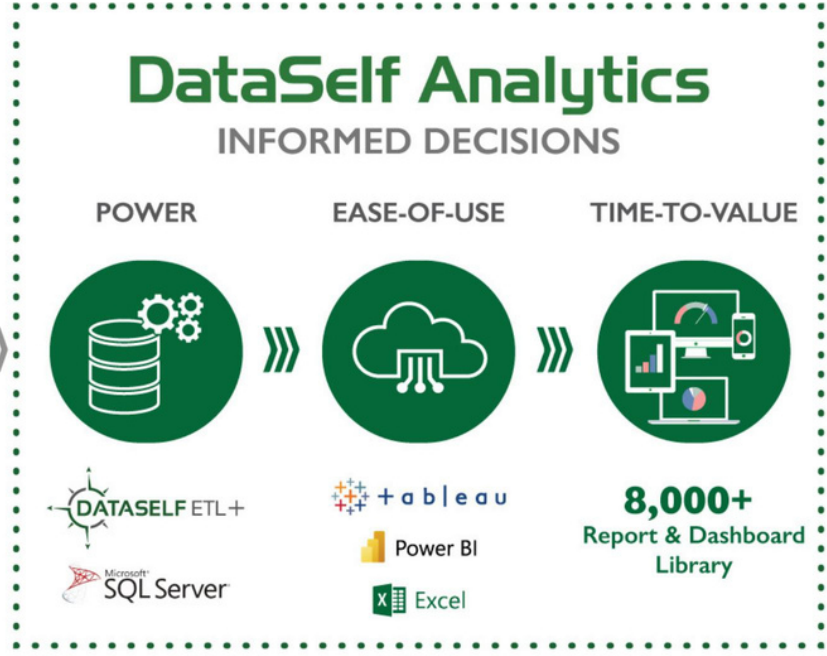
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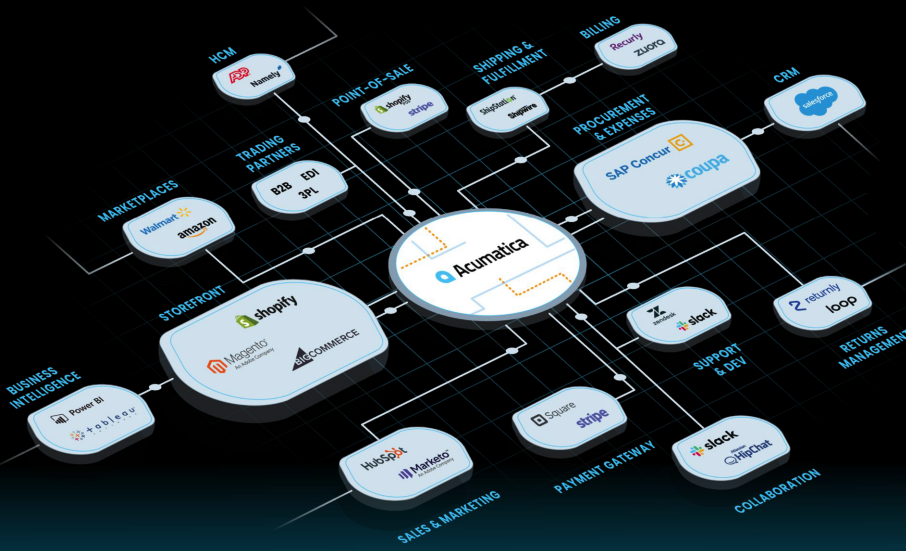


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Moh Damerchi,
Sr. Channel Sales Manager,
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