Scaling New Heights

2012

Conference Schedule and Course Descriptions

Table of Contents for Sessions

Sunday - June 17 (Pre-Conference)

12:00	Registration is Open (12:00 to 9:00)						
12:15							
12:30							
12:45							
	Pre-Conference Breakout Sessions Included with Your Conference Registration				**Pre-Conference Hands on Workshops** Separate Registration Required		**Networking Activities** Separate Registration Required (Opens March 1)
1:00	Technology Tools for the Successful Consultant (New!)	Method 301: Advanced Concepts (New!)	Designing Custom Reports for Your Clients (New!)	Intuit Product Topic TBD	Method Level 1 Certification (Part 1)	Bill.com Guru Certification (Part 1) (New!)	Discover Nashville Tour
1:15							
1:30							
1:45							
2:00							
2:15							
2:30							
2:40	Break						
3:00	Networking Panel: Leveraging Local Networking Groups	Autofy: The Fundamentals (New!)	Business Discovery: Using webKPI for Powerful, User-Driven BI (New!)	QuickBooks Enterprise Solutions Certification Exam Preparation (Part 1)	Method Level 1 Certification (Part 2)	Bill.com Guru Certification (Part 2) (New!)	
3:15							
3:30							
3:45							
4:00							
4:15							
4:30							
4:40	Break						No Conference Activities
5:00	Integrated CRM to Gain & Maintain a Competitive Edge	Transaction Pro Importer (New!)	Business Intelligence Panel: Leveraging BI with Your Clients (New!)	QuickBooks Enterprise Solutions Certification Exam Preparation (Part 2)	Method Level 1 Certification (Part 3)	Bill.com Guru Certification (Part 3) (New!)	
5:15							
5:30							
5:45							
6:00							
6:15							
6:30							
6:45							
7:00	Evening Networking Social						
7:15							
7:30							
7:45							
8:00							
8:15							
8:30							
8:45							
9:00	No Conference Activities						
9:15							
9:30							
9:45							
10:00							

Monday, June 18

Time															
7:00 7:15 7:30 7:45	Breakfast/Registration														
8:00 8:15	Transition to Ryman Auditorium														
8:30 8:45 8:50 9:00 9:15	General Session - Historic Ryman Auditorium (Original Home of the Grand 'Ole Opry)														
9:30 9:45	Break														
10:00 10:15 10:30 10:45 11:00 11:15 11:30	General Session - Historic Ryman Auditorium (Original Home of the Grand 'Ole Opry)														
11:40 12:00 12:15 12:30 12:45	Lunch/Exhibition (11:40-1:00)														
	Breakout Sessions Included in Your Conference Registration									**Optional Hands on Workshop Sessions** Separate Registration Required					
1:00 1:15 1:30 1:45 2:00 2:15 2:30	QBPOS Funda-mentals (Part 1)	QuickBooks ProAdvisor: Certification Exam Preparation (Part 1) (New!)	QBES Advanced Inventory Deep Dive (Part 1) (New!)	QuickBooks Online: Making the Best Choice for Your Clients (New!)	QuickBooks Tips, Tricks and Custom Processes (Part 1) (Expanded!)	New Client Qualification and Assessment (New!)	Bill.com - Essentials (New!)	Advanced Method Tips and Tricks (Part 1) (New!)	QQube (Part 1) (Expanded!)	QuickBooks for Non Profit Organizations (Part 1) (Expanded!)	QuickBooks Statement Writer (Part 1) (Expanded!)	Business Planning Workshop (Part 1)	Professional Billing with Spring Ahead (Part 1) (New!)	QuickBooks Integration with Autofy (Part 1) (New!)	ACCTivate Silver Certification Training (Part 1) (New!)
2:40 3:00 3:15	Break (2:40 to 3:20)														
3:20 3:30 3:45 4:00 4:15 4:30 4:50	QBPOS Funda-mentals (Part 2)	QuickBooks ProAdvisor: Certification Exam Preparation (Part 2) (New!)	QBES Advanced Inventory Deep Dive (Part 2) (New!)	Setting Up QuickBooks Online (New!)	QuickBooks Tips, Tricks and Custom Processes (Part 2) (Expanded!)	Maximizing the Value of Your Client Relationships (New!)	SmartVault Inside the Apps You Are Already Using New!	Method on Your Website: Portals, Web Forms and Knowledge Base	QQube (Part 2) (Expanded!)	QuickBooks for Non Profit Organizations (Part 2) (Expanded!)	QuickBooks Statement Writer (Part 2) (Expanded!)	Business Planning Workshop (Part 2)	Professional Billing with Spring Ahead (Part 2) (New!)	QuickBooks Integration with Autofy (Part 2) (New!)	ACCTivate Silver Certification Training (Part 2) (New!)
5:00 5:15 5:30 5:45 6:00 6:15	Open Exhibition (5:00-6:30)														
6:30 6:45 7:00 7:15 7:30 7:45	Accounting Today Cloud Social (6:30-8:00)														
8:00 8:15 8:30 8:45 9:00 9:15 9:30 9:45 10:00	No Conference Activities														

Tuesday, June 19

Time															
6:30 6:45	Breakfast														
7:00 7:15 7:30 7:45	ScanWriter - Meeting the Challenges of Workflow and Data Entry Management in QuickBooks and Excel	Right Networks - Hosting Your Business In The Cloud: What's new with Right Networks in 2012?	Big Time - How to Make More Money & Expand Your Practice Doing It.	Concur - Add Profits to Your Practice with Cloud Services	Cloud9 Real Time - Together In The Cloud	TBD - Check Back for More Information	TBD - Check Back for More Information	TBD - Check Back for More Information	Breakfast						
8:00 8:15	General Session - Presented by Joe Woodard														
8:30 8:45 8:50 9:00 9:15	Keynote Presentation														
9:30	Break														
	Breakout Sessions Included with Your Conference Registration									**Optional Hands on Workshop Sessions** Separate Registration Required					
10:00 10:15 10:30 10:45 11:00 11:15 11:40	New Features of QuickBooks Point of Sale Version 11 (New!)	Trouble-shooting QuickBooks: Top 10 Errors	QuickBooks ProAdvisor: Certification Exam Preparation (Part 3) (New!)	QB Mac: The Basics (New!)	Building a Successful CFO and Advisory Practice (New!)	Fishbowl Inventory Deep Dive Part 1: Wholesale & Distribution	Bill.com Expert Certification (Part 1) (New!)	Xpanded Reports: It's Not Your Same Old QuickBooks Reports (Expanded!)	Method Mastering Method CRM (Part 1) (New!)	QuickBooks Online Advanced Concepts (Part 1) (New!)	Trouble-shooting QuickBooks (Part 1)	Business Planning Workshop (Part 3)	Crystal Reports with QQube (Part 1)	Advanced Excel w/ QQube Workshop (Part 1) (New!)	ACCTivate Silver Certification Training (Part 3) (New!)
11:45 12:00 12:15 12:30 12:45	Lunch/Exhibition (11:40 to 1:00)														
1:00 1:15 1:30 1:45 2:00 2:15 2:30	Extending the Capabilities of QuickBooks Point of Sale (New!)	QuickBooks Point of Sale: Pricing, Discounts, Price Levels and UOMs (New!)	QuickBooks ProAdvisor: Certification Exam Preparation (Part 4) (New!)	QB Mac: Beyond the Basics (New!)	Developing a High Performance Team (New!)	Fishbowl Inventory Deep Dive Part 2: Manu-facturing	Bill.com Expert Certification (Part 2) (New!)	Xpanded Reports: How Many Reports Can We Create in 100 Minutes (Expanded!)	Method Mastering Method CRM (Part 2) (New!)	QuickBooks Online Advanced Concepts (Part 2) (New!)	Trouble-shooting QuickBooks (Part 2)	Business Planning Workshop (Part 4)	Crystal Reports with Qqube (Part 2)	Advanced Excel w/ QQube Workshop (Part 2) (New!)	ACCTivate Silver Certification Training (Part 4) (New!)
2:40 3:00 3:15	Break/Exhibition (2:40 to 3:20)														
3:20 3:30 3:45 4:00 4:15 4:30 4:40	QuickBooks Point of Sale: Best Practices Panel	QuickBooks Lagniappe: IPN, Multi-Currency, UOM, and Fixed Assets (New!)	QuickBooks ProAdvisor: Certification Exam Preparation (Part 5) (New!)	100 Minutes with Tim and Jacint	7 Minute Presentation Workshop (Part 1) (New!)	"There's an App for That!" (New!)	QuickBooks and e-Commerce	QuickBooks for Professional Service Firms	Method Sales and Pre-Sales Strategies	QuickBooks Online Advanced Concepts (Part 3) (New!)	Trouble-shooting QuickBooks (Part 3)	SmartVault Master Class (New!)	Crystal Reports with QQube (Part 3)	Advanced Excel w/ QQube Workshop (Part 3) (New!)	ACCTivate Silver Certification Training (Part 5) (New!)
5:00 5:15 5:30 5:45 6:00 6:15	Open Exhibition														
6:30 6:45 7:00 7:15 7:30 7:45 8:00 8:15 8:30	National Advisor Network Banquet (Members Only)														
8:45 9:00 9:15 9:30 9:45 10:00	No Conference Activities														

Wednesday, June 20

Time																
6:30 6:45	Breakfast															
7:00 7:15 7:30 7:45	ScanWriter - Hands-on ScanWriter, SourceLink, and Workflow DMS Training Workshop	Right Networks - Hosting Your Business In The Cloud: What's new with Right Networks in 2012?	Big Time - How to Become a Go-To Tech Resource for Your Clients	Wasp Technologies - QR Codes - A Dying Fad or is Misuse and Abuse to Blame	Office Tools Professional - Workflow & Automation: The Processes That Defines Our Business	TBD - Check Back for More Information	TBD - Check Back for More Information	TBD - Check Back for More Information	Breakfast							
8:00 8:15 8:30 8:45 8:50 9:00 9:15	General Session and Keynote Presentations															
9:30	Break															
	Breakout Sessions Included with Your Conference Registration									**Optional Hands on Workshop Sessions** Separate Registration Required						
10:00 10:15 10:30 10:45 11:00 11:15 11:40	QBPOS: Tips, Tricks and Custom Processes	QBPOS End to End: Multi-store	QuickBooks ProAdvisor: Certification Exam Preparation (Part 6) (New!)	QuickBooks Topic TBD	QuickBooks Data File Management - Best Practices	7 Minute Presentation Workshop (Part 2) (New!)	Social Networking Panel (New!)	Fishbowl Introduction: What it Does and Where it Fits (New!)	Method Consulting Strategies Panel	Intuit FSMES Workshop (Part 1) (Expanded!)	QuickBooks Inventory Workshop (Part 1) (New!)	Crystal Reports with QQube (Part 4)	Transaction Pro Importer Workshop (Part 1) (New!)	Bill.com Guru Certification Workshop (Part 1) *(Repeat)* (New!)	Deep Dive with Xpanded Reports Workshop (Part 1) (New!)	ACCTivate Silver Certification Training (Part 6) (New!)
11:45 12:00 12:15 12:30 12:45	Lunch/Exhibition (11:40 to 1:00)															
1:00 1:15 1:30 1:45 2:00 2:15 2:30	QBPOS Fund-amentals (Part 1) *(Repeat)*	QBPOS End to End: Physical Inventory	QuickBooks ProAdvisor: Certification Exam Preparation (Part 7) (New!)	QuickBooks Tips, Tricks and Custom Processes (Part 1) *(Repeat)* (Expanded!)	QBO Consulting Strategies (New!)	The One Year Marketing Plan (New!)	Increasing Your Web Presence and SEO Optimization Panel	Fishbowl Introduction: What it Does and Where it Fits (New!)	Method Advanced Tips and Tricks (Part 2) (New!)	Intuit FSMES Workshop (Part 2) (Expanded!)	QuickBooks Inventory Workshop (Part 2) (New!)	webKPI Dashboard Designer (Part 1) (New!)	Transaction Pro Importer Workshop (Part 2) (New!)	Bill.com Guru Certification Workshop (Part 2) *(Repeat)* (New!)	Deep Dive with Xpanded Reports Workshop (Part 2) (New!)	ACCTivate Silver Certification Training (Part 7) (New!)
2:40 3:00 3:15	Break/Exhibition (2:40 to 3:20)															
3:20 3:30 3:45 4:00 4:15 4:30 4:45 5:00	QBPOS Fund-amentals (Part 2) *(Repeat)*	QBPOS End to End: Accounting Integration	QuickBooks ProAdvisor: Certification Exam Preparation (Part 8) (New!)	QuickBooks Tips, Tricks and Custom Processes (Part 2) *(Repeat)* (Expanded!)	Leveraging the QBO Ecosystem for Your Clients (New!)	The Legalities of the Client-Consultant Relationship (New!)	10 Reasons to Fire a Client (New!)	Networking QuickBooks - Best Practices	Method Application Showcase	Intuit FSMES Workshop (Part 3) (Expanded!)	QuickBooks Inventory Workshop (Part 3) (New!)	webKPI Dashboard Designer (Part 2) (New!)	Transaction Pro Importer Workshop (Part 3) (New!)	Bill.com Guru Certification Workshop (Part 3) *(Repeat)* (New!)	Deep Dive with Xpanded Reports Workshop (Part 3) (New!)	ACCTivate Silver Certification Training (Part 8) (New!)
	Conference Ends at 5:00															

Sunday Course Descriptions

1:00 pm

Technology Tools for the Successful Consultant **(New!)**

Instructor: Laura Madeira

When providing consulting services or making a sales presentation, there are tools you can use to provide the extra "WOW" impact to your presentation. Learn what tools you can keep in your tool bag that will make your sessions with clients memorable and help you stand out.

In this session you will learn about recording your training sessions, Snagit image captures, Camtasia video clips, VMWare virtual desktops, ClickTricks presentation tools, and other useful tools and tricks that you can use every day in your business.

Learn how to deliver efficiently the extra value that will impress your clients, provide them with tools after the training and truly differentiate your services from others.

Method 301: Advanced Concepts **(New!)**

Instructor: Paul Jackson

Our conferences (and Method boot camps) offer much Method training, but new for Scaling New Heights 2012 will be a series of advanced Method training for Method Solution Providers to take their Method skills to the next level - beyond Level 2 certification.

Topics include:

1. Inserting records into tables - with parent and child records
2. Batch credit card processing
3. Batch transaction processing - using advanced looping
4. Multi-conditional statements - inside and outside loops
5. ...and more!

Prerequisites: Attendance in One Method Level 2 Certification Bootcamp

We also recommend:

1. Method Advanced Tips and Tricks Parts 1 and 2 (Monday and Wednesday)
2. Method Sales and Pre-Sales Strategies (Tuesday)
3. Method Consulting Strategies Panel (Wednesday)

Designing Custom Reports for Your Clients **(New!)**

Instructor: Gale Kirsopp

This session focuses on strategic report design services you can offer your clients – the front-end consulting work you do with your clients before working with a QuickBooks-integrated report designer application (like Xpanded Reports, webKPI or Crystal Reports/Excel with QQube). The objective of this course the project design – working with the client to determine what information they need displayed in the report, the report format, the data source (or sources) for the information on the report and overall project specifications. Once you have this information about the client's needs you can recommend the best report designer application to meet their needs, you can provide a realistic quote and you can begin work.

This session is a fantastic predecessor to our conference training on Xpanded Reports, Advanced Excel (with QQube), Crystal Reports (with QQube), webKPI and QuickBooks Statement Designer.

Intuit Product Topic TBD

Instructor:

Method Level 1 Certification (Part 1)

Instructor: Danny DoCouto

This course covers the Method concept (i.e. "What is Method), the structure and opportunities of the Method Solution Provider program and technical training on the use of Method and the configuration of Method. The technical sections of this track cover creating a new Method account, connecting the account to a QuickBooks data file, general Method (non-customized), and the configuration of method for your clients. Configuration topics include:

1) Creating roles and limiting user access
2) Modifying Tabs and Tab Links
3) Customizing and creating screens (i.e. input forms and on screen reports), and "programming" Method functionality and behavior through the use of pre-designed objects and through the use of actions (e.g. rules).

The session requires separate registration.

Bill.com Guru Certification Preparation (Part 1) (New!)

Instructor: Judie McCarthy, Bill.com

In the Bill.com Guru Certification Preparation workshop, you learn the concepts involved in building a highly profitable bookkeeping practice. With interactive discussions, hands-on activities, and exercises, participants become equipped to utilize cloud based technologies to take action anytime, anywhere. In this workshop, you will:

- Evaluate existing business processes and plan to re-engineer for efficiency
- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

(Note: You can prepare for Expert Certification prior to the conference through online training courses available on the Bill.com website. Or, if you prefer you can prepare for Expert Certification during the conference - during the Tuesday breakout sessions. We will repeat this workshop on Wednesday. Please contact us at 404-857-0700 if you have any questions.)

The session requires separate registration.

Discover Nashville Tour (New!)

1:00 pm to 4:30 pm

Spend an afternoon uncovering the beauty of Nashville. An experienced tour guide will provide you with incredible stories of The Music City, and its rich history.

Enjoy a driving tour of attractions such as Honky Tonk Row, the State Capitol, Bicentennial Mall and Farmers Market, The Parthenon, world famous Music Row, and Studio B, where Elvis recorded the majority of his hit records.

Then spend time inside the Historic Ryman Auditorium, considered the “Mother Church of Country Music” and one of the great music venues in the world and visit The Country Music Hall of Fame and Museum

3:00 pm

Networking Panel: Leveraging Local Networking Groups

Moderator: Jennifer Katrulya

This panel session focuses on building a local networking chapter. The course greatly benefits existing and prospective chapter leaders of The National Advisor Network, but you can apply the expertise shared by our panelists to building any local networking group. The panel will accept questions from attendees, but will begin the conversation focusing on how to locate participants and strategies for conducting an effective meeting.

This session will include a 10 minute, high level overview of the tools available to National Advisor Network chapter leaders, including procedures for maintaining the chapter web page, coordinating with the National Chapter Coordinator, maintaining the member roster and communicating with members.

Autofy: The Fundamentals **(New!)**
Instructor: Joe Dwyer

Autofy is a powerful data synchronization utility that empowers you as the QuickBooks ProAdvisor to integrate your clients' QuickBooks files with PayPal and Salesforce.com. This session provides you with a high-level introduction to the basic functionality of Autofy and also provides an overview of Autofy's more configurable options that allow you to integrate QuickBooks with most any third party database.

This session provides is both a training session on the fundamentals of Autofy and a predecessor to the Autofy hands on workshop conducted on Monday, June 18.

Business Discovery: Using webKPI for Powerful, User-Driven BI **(New!)**
Instructor: Joe Lindsey

This session provides an overview webKPI - an award-winning Business Intelligence (KPI) application with powerful, market-leading QuickBooks integration. This session focuses on webKPI's Business Discovery approach and ways you can empower your clients to explore financial reporting data and key indicators.

This session will emphasize the end user experience - as you and your clients "scuba dive" through multi-dimensional data. This session will also demonstrate how data visualization is a powerful memory tool - and the importance of visual images (e.g. charts and graphs) for your clients to understand measurement data.

In conjunction with this course we recommend:
1. Designing Custom Reports for Your Clients (Sunday)
2. Business Intelligence Panel: Leveraging BI with Your Clients (Sunday)
3. Building a Successful CFO and Advisory Practice (Tuesday)
4. webPKI Workshop: "Dashboard Design for Forward Thinking Entities" (Wednesday)

QuickBooks Enterprise Solutions Certification Exam Preparation (Part 1) **(New!)**
Instructor: TBD

This course uses the official Intuit curriculum for QuickBooks Enterprise Solutions certification and covers:

Part 1: Exploring QuickBooks Enterprise Solutions - Technical Concepts

- How QuickBooks Enterprise Solutions is Different
- When is Enterprise Solutions a good fit for your client?
- What is the Full Service Plan?
- What industries are appropriate for Enterprise Solutions?
- Features of Advanced Inventory and Qualifying Its Features for Your Client
- Custom reporting features unique to Enterprise Solutions
- Working with enhanced permissions - users and roles

Part 2: Moving your clients and your practice to the mid-market

- The mid-market consulting opportunity
- Preparing your clients to adopt mid-market accounting software
- Preparing your practice for mid-market software implementations
- Exploring ways to engage clients who use Enterprise Solutions
- Intuit resources available to Enterprise Solutions users and advisors

Method Level 1 Certification (Part 2)
Instructor: Danny DoCouto

This course covers the Method concept (i.e. "What is Method), the structure and opportunities of the Method Solution Provider program and technical training on the use of Method and the configuration of Method. The technical sections of this track cover creating a new Method account, connecting the account to a QuickBooks data file, general Method (non-customized), and the configuration of method for your clients. Configuration topics include:
1) Creating roles and limiting user access
2) Modifying Tabs and Tab Links
3) Customizing and creating screens (i.e. input forms and on screen reports), and "programming" Method functionality and behavior through the use of pre-designed objects and through the use of actions (e.g. rules).

The session requires separate registration.

Bill.com Guru Certification Preparation (Part 2) (New!)

Instructor: Judie McCarthy, Bill.com

In the Bill.com Guru Certification Preparation workshop, you learn the concepts involved in building a highly profitable bookkeeping practice. With interactive discussions, hands-on activities, and exercises, participants become equipped to utilize cloud based technologies to take action anytime, anywhere. In this workshop, you will:

- Evaluate existing business processes and plan to re-engineer for efficiency
- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

(Note: You can prepare for Expert Certification prior to the conference through online training courses available on the Bill.com website. Or, if you prefer you can prepare for Expert Certification during the conference - during the Tuesday breakout sessions. We will repeat this workshop on Wednesday. Please contact us at 404-857-0700 if you have any questions.)

The session requires separate registration.

5:00 pm

Integrated CRM to Gain & Maintain a Competitive Edge

Instructor: Sam (Naseem) Saab

A new breed of customer relationship management (CRM) software provides organizations with the power to connect their applications, data and staff in ways that greatly enhance the ability to attract and retain business. “Integrated CRM” serves as a data “hub” for centralized information management across an organization and delivers the ability to view data for meaningful, accurate insight into the core areas of business, including sales and marketing, operations and service delivery, customer service and support, and billing and collections.

For example, integrated CRM can enhance online document management through products like SmartVault and improve marketing campaigns through two-way communication with services such as Constant Contact. Integrated CRM also can connect with email applications such as Microsoft Outlook and client accounting software such as Intuit QuickBooks. Add SharePoint integration to the mix, and the CRM hub significantly increases the organization’s ability to work efficiently, capture opportunities, and effectively communicate internally and externally.

Smart integration allows applications to “talk” to one another and share data without necessarily sharing a single platform or database. Integration also offers flexibility and choices — enabling users to select best-of-breed applications and customize a business solution that meets their unique needs. This dynamic presentation is a must, for consultants, business owners and managers who want to learn how they can leverage Integrated CRM for their business and their client’s business as well as lean new strategies for affecting business growth.

Transaction Pro Importer (New!)

Instructor: John Magno

This session provides in-depth training on the Transaction Pro line of products for QuickBooks and QuickBooks Online – empowering you to import, export and delete transactions and lists from QuickBooks and QuickBooks Online and to leverage import utilities to provide new consulting services to your clients.

The course will cover the following topics:

- Ecosystem Overview: the available technologies for exchanging data with QuickBooks and QuickBooks Online (QBO).
- Practical uses (and consulting opportunities) for Transaction Pro utilities
- Strategies for recommending, using and training clients on import/export utilities

- Technical Training: Transaction Pro Importer 5.0
- Technical Training: Transaction Pro Exporter 5.0
- Technical Training: Transaction Pro Deleter
- Technical Training: Tools for QuickBooks Online

This course is a predecessor to the Transaction Pro Importer Workshop (Wednesday, June 20)

Business Intelligence Panel: Leveraging BI with Your Clients **(New!)**

Moderator: Jennifer Katrulya

This panel discussion focuses on practical uses of business intelligence for QuickBooks ProAdvisors and their clients, including opportunities to leverage business intelligence to provide additional advisory services to your clients.

Most of our clients do not leverage business intelligence (BI) or key performance indicators (KPI) to steer their companies. As ProAdvisors we are perfectly suited to solve this problem for our clients - either through training on the use of BI tools or by incorporating those tools (and reports) into the consulting services we offer.

In conjunction with this course we recommend:
1. Designing Custom Reports for Your Clients (Sunday)
2. Business Discovery: Using webPKI for Powerful, User-Driven Business Intelligence
3. Building a Successful CFO and Advisory Practice (Tuesday)
4. webPKI Workshop: "Dashboard Design for Forward Thinking Entities" (Wednesday)

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Instructor: TBD

This course uses the official Intuit curriculum for QuickBooks Enterprise Solutions certification and covers:

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- How QuickBooks Enterprise Solutions is Different
- When is Enterprise Solutions a good fit for your client?
- What is the Full Service Plan?
- What industries are appropriate for Enterprise Solutions?
- Features of Advanced Inventory and Qualifying Its Features for Your Client
- Custom reporting features unique to Enterprise Solutions
- Working with enhanced permissions - users and roles

Part 2: Moving your clients and your practice to the mid-market

- The mid-market consulting opportunity
- Preparing your clients to adopt mid-market accounting software
- Preparing your practice for mid-market software implementations
- Exploring ways to engage clients who use Enterprise Solutions

Intuit resources available to Enterprise Solutions users and advisors

Method Level 1 Certification (Part 3)

Instructor: Danny DoCouto

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Bill.com Guru Certification Preparation (Part 3) **(New!)**
Instructor: Judie McCarthy, Bill.com

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- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

(Note: You can prepare for Expert Certification prior to the conference through online training courses available on the Bill.com website. Or, if you prefer you can prepare for Expert Certification during the conference - during the Tuesday breakout sessions. We will repeat this workshop on Wednesday. Please contact us at 404-857-0700 if you have any questions.)

The session requires separate registration.

Monday Course Descriptions

1:00 pm

QBPOS Fundamentals (Part 1)
Instructor: Will English

This is a two part session.

Intended as topical introduction, this course is designed to help you gain a high level understanding of almost all the features of QBPOS as well as what the end-user experience might generally be like.

This two part session covers:

- Product versions and levels introduction
- Understanding item types
- Vendor and Purchasing functions
- Customer and sales
- Lesser known features
- Understanding peripheral hardware
- Cash Drawer Reports/End of Day

Note: This session repeats on Wednesday.

QuickBooks ProAdvisor: Certification Exam Preparation (Part 1) **(New!)**
Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QBES Advanced Inventory Deep Dive (Part 1) **(New!)**
Instructor: Mario Nowogrodski

This is a two-part session.

QuickBooks Enterprise Solutions offers an Intuit-developed add-on application called "Advanced Inventory" that includes multi-locatioin tracking, serial number tracking or lot tracking, and FIFO inventory valuation.

QuickBooks Enterprise Solutions also offers a new feature called Enhanced Inventory Receiving, as well as established features for warehouse environments like Shipping Manager and variable Bills of Materials.

These features, coupled with SmartScan by Baus Systems (featured in Part 2 of this session), allow you to stretch the use of QuickBooks for your clients who track inventory.

QuickBooks Online: Making the Best Choice for Your Clients **(New!)**
Instructor: Stacy Kildal

Learn about the differences in QuickBooks Online subscription levels, examples of what type of client would be a good fit for each, as well as how QBO compares to desktop editions.

This session compares the features in various QuickBooks Online editions to QuickBooks desktop - and to each other - including:

- Strategic Benefits of QuickBooks Online (All Subscription Levels)
- QBO and QuickBooks Desktop Feature Comparison

Features, functionality considerations and case studies for:

- QBO Simple Start
- QBO Essentials
- QBO Plus

QuickBooks Tips, Tricks and Custom Processes (Part 1) **(Expanded!)**
Instructor: Michelle Long

This is a two part session.

Every year, Intuit infuses QuickBooks with a wide range of new features. However, it is not realistic to expect Intuit to meet 100% of our client's business-specific and industry-specific needs with each new version. So...as QuickBooks consultants we have to think creatively - to provide our clients with tips, tricks and custom processes. This in-depth technical presentation covers essential QuickBooks Tips, Tricks and Custom Processes to help you stretch QuickBooks to meet your client's business-specific needs.

Note: This session repeats on Wednesday.

New Client Qualification and Assessment **(New!)**
Instructor: Jennifer Katrulya

Get started on the right foot when dealing with inquiries from new prospects by getting the information you need to select the right clients for your practice (and avoid the wrong ones). In this session you'll receive turn-key templates you can use in your practice to define your "right fit" client and gather key information you'll need to successfully price the engagement. We'll even show you how to include a Client Needs Assessment in your service offerings so that prospects PAY YOU to decide if you want to work with them!

Bill.com – Essentials **(New!)**
Instructor: Judie McCarthy

The Bill.com Essentials course is designed to quickly get you proficient in using Bill.com.

In this session, you will learn how to:

- Set up a basic Bill.com account
- Utilize the workflow process to manage and pay bills
- Manage receivables and collections with a customized portal
- Create reports to manage the business
- File and retrieve company, vendor and customer documents

Advanced Method Tips and Tricks (Part 1) **(New!)**
Instructor: Joe Woodard

This is a two-part session. Part 2 is on Wednesday.

Joe Woodard has personally logged thousands of hours configuring Method for his clients. Over the past year Joe has also built a multi-professional Method consulting firm, managing some of the most complex Method implementations in the country.

In this two part session Joe will share creative and practical uses of Method actions, objects and screen settings (i.e. forms) - from his own experience conducting Method consulting engagements for his clients.

Prerequisites: Attendance in One Method Level 2 Certification Bootcamp

We also recommend:

1. Method 301: Advanced Concepts (Sunday)
2. Method Sales and Pre-Sales Strategies (Tuesday)
3. Method Consulting Strategies Panel (Wednesday)

QQube (Part 1) **(Expanded!)**
Instructor: Chuck Vigeant

QQube Basics: what it does, how it is used, who uses it, and what kind of output you can expect from this ground breaking application – in real client situations. Discover the technology overview, what data is available or not available, and the difference between a data warehouse and a report writer. Learn about the components, requirements, how to use the QQube Configuration tool, and setting expectations for data updates. We will also begin the process of understanding how the data is organized in QQube.

QuickBooks for Non Profit Organizations (Part 1) **(Expanded!)**
Instructor: Pam Ludin, Bookminders

This course is designed to demonstrate methods for tracking and reporting the unique activities of non-profit organizations such as 501-c-3 charities, membership associations, schools and churches. The class is divided into two sessions. In this first session we will demonstrate the appropriate method of setting up the books and entering common transactions for a typical nonprofit. Topics include:

1) What the chart of accounts needs to look like
2) Using Classes to track programs
3) Using the Customer list to track donors, members and students
4) Importing Customer lists from Excel into QuickBooks
5) Using Customer Type to segregate donors
6) Entering Vendors
7) Entering Annual Budgets
8) Entering Budgets for a program or restricted grant
9) Entering Income
10) Entering Batch Invoices for member Dues
11) Using QuickBooks as a Donor Data Base

12) Allocating expenses to programs automatically
13) Tracking Restricted Grants
14) Reports Compared to Budget for the Board
15) Reports for the Auditor at year end.

The session requires separate registration.

QuickBooks Intuit Statement Writer (Part 1) **(Expanded!)**

Instructor: TBD

Learn to use QuickBooks Statement Writer to expand the reporting capabilities of QuickBooks.

In this workshop you will learn how to:

- Create financial statements – using Microsoft Excel
- Create engagement and cover letters – using Microsoft Word
- Bring QuickBooks and statement data into letters
- Suppress zero balance Lines
- Show or hide inactive accounts in statements
- Format negative balances and decimals (rounding)
- Set date ranges (including 4-week months and 13 week quarters)
- Consolidate financials by classes and jobs
- Format headers, footers and pagination
- Leverage Excel features with QuickBooks Statement Writer like charts and pivot tables

The session requires separate registration.

Business Planning Workshop (Part 1 of 4)

Instructor: Victor Nahigian

In this powerful, hands on workshop you will enter the class with a blank Word document and leave with an established business plan specific to your firm and especially tailored for the QuickBooks ProAdvisor and accounting professional.

Curriculum for Business Planning Class

1) Introduction to a business plan:
    a. Sample Completed Business Plan
    b. Discuss there are only 10 main sections needed
    c. Do exercises about who we are, and what are company does
    d. Learn to write precise company overviews
2) Discuss Marketing Plan:
    a. Review “Made to Stick” book
    b. Discuss a precise plan – specifics
    c. Review where to get marketing reports
    d. Discuss demography, competitors
    e. Finish a marketing plan
3) Review Financial Statements:
    a. How to forecast sales
    b. Create a customized commission program
    c. Calculate labor hours and service sales
    d. Review overhead costs
    e. What is the “owner’s Cash Flow”
    f. Finalize Cash Flow, IS, and BS
4) Executive Overview
    a. What are the company goals
    b. Leave with a mission statement for your company
    c. Write the executive overview
    d. Detail your exit strategy
    e. Finalize Business Plan

Do you have questions about this workshop? Feel free to contact the workshop instructor Victor Nahigian at 617-965-4615 x110. The session requires separate registration.

Professional Billing with Spring Ahead (Part 1) **(New!)**
Instructor: Chris Farrell, Spring Ahead

Not only is Spring Ahead a powerful time and expense application that integrates with QuickBooks, it is also a billing solution. In this workshop you will learn to use Spring Ahead to:

1. Create invoices that include both billable time and expenses
2. Set billing rates by project (e.g. job) - including sub-projects
3. Set billing rates by timekeeper
4. Track project budgets - with budget vs. actual for both billed and unbilled time (e.g. work in process)
5. Review and process invoices in batches
6. Set invoice lines to optionally include service descriptions, timesheet notes and/or billing periods
7. Set overtime rates and rules to automatically calculate billing rates for overtime hours
8. Set overtime rates and rules to automatically increase pay rates for contractors - and import bills into QuickBooks.
9. Import Spring Ahead invoices into QuickBooks

The session requires separate registration.

QuickBooks Integration with Autofy (Part 1) **(New!)**
Instructor: Joe Dwyer

Autofy is a powerful data synchronization utility that empowers you as the QuickBooks ProAdvisor to integrate your clients' QuickBooks files with PayPal and Salesforce.com. This workshop will also provide an introduction to Autofy's more configurable options that allow you to integrate QuickBooks with most any third party database.

Simply put: Autofy enables you to provide a level of data integration services for your clients using QuickBooks.

Prerequisite: Participation in the Autofy session on Sunday, June 17 or equivalent knowledge.

The session requires separate registration.

ACCTivate Silver Certification Training (Part 1) **(New!)**
Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives
- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

This workshop requires separate registration.

3:20 pm

QBPOS Fundamentals (Part 2)

Instructor: Will English

This is a two part session.

Intended as topical introduction, this course is designed to help you gain a high level understanding of almost all the features of QBPOS as well as what the end-user experience might generally be like.

This two part session covers:

- Product versions and levels introduction
- Understanding item types
- Vendor and Purchasing functions
- Customer and sales
- Lesser known features
- Understanding peripheral hardware
- Cash Drawer Reports/End of Day

Note: This session repeats on Wednesday.

QuickBooks ProAdvisor: Certification Exam Preparation (Part 2) (New!)

Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QBES Advanced Inventory Deep Dive (Part 2) (New!)

Instructor: Mario Nowogrodski

This is a two-part session.

QuickBooks Enterprise Solutions offers an Intuit-developed add-on application called "Advanced Inventory" that includes multi-locatioin tracking, serial number tracking or lot tracking, and FIFO inventory valuation.

QuickBooks Enterprise Solutions also offers a new feature called Enhanced Inventory Receiving, as well as established features for warehouse environments like Shipping Manager and variable Bills of Materials.

These features, coupled with SmartScan by Baus Systems (featured in Part 2 of this session), allow you to stretch the use of QuickBooks for your clients who track inventory.

Setting Up QuickBooks Online (New!)

Instructor: Stacy Kildal

Take this deep dive into setup: a step by step process that empowers you to grow your practice by servicing QBO clients.

This session covers setting up from scratch, upgrading from one subscription level to another and converting from QuickBooks desktop.

QuickBooks Tips, Tricks and Custom Processes (Part 2) **(Expanded!)**

Instructor: Michelle Long

This is a two part session.

Every year, Intuit infuses QuickBooks with a wide range of new features. However, it is not realistic to expect Intuit to meet 100% of our client's business-specific and industry-specific needs with each new version. So...as QuickBooks consultants we have to think creatively - to provide our clients with tips, tricks and custom processes. This in-depth technical presentation covers essential QuickBooks Tips, Tricks and Custom Processes to help you stretch QuickBooks to meet your client's business-specific needs.

Maximizing the Value of Your Client Relationships **(New!)**

Instructor: Jennifer Katrulya

Deciding what services your practice will provide, presenting those services and fees to clients, and measuring long-term client profitability can seem extremely difficult in what feels like a highly customized profession. You'll be amazed by what can be accomplished when you create a "menu of services" and pricing options that your prospects and clients can choose from, and the opportunities this presents for you to earn fees based on the value of your services vs. highly restrictive hourly billing. You'll see how simple changes in your practice model can help you finally get paid what you worth and have more time to enjoy what you do!

SmartVault Inside the Apps You are Already Using **(New!)**

Moderator: Dania Buchanan
Instructor: Maureen Sahualla

With SmartVault, you can attach and view files directly from a variety of applications and devices. It is intuitive, easy to use and delivers significant efficiency gains for managing and sharing documents without changing the way you work today

In this session, we'll introduce you to the SmartVault service – online file storage, secure and compliant file sharing, and seamless application integration. We'll also demonstrate the power of SmartVault "Inside", highlighting several of our integrated applications, and how the power of our growing ecosystem delivers practical value to you and your clients.

Learning objectives for this session:

- Understand the three pillars of the SmartVault service and how to put them into practice - Online document storage, secure and compliant file sharing, and seamless application integration

- Discuss the online file storage and file sharing competitive landscape - Similarities and differences among the online cloud storage service providers

- See a demo of the SmartVault Ecosystem of Integrated Applications - Store your document in the cloud once, and access it from a variety of applications and devices. We'll highlight integrations with QuickBooks, MethodCRM, SpringAhead, XpandedReports, and our newest plug-in for Microsoft Outlook in a real-world practical case study

- Learn about the SmartVault Solution Provider Program - Overview of the opportunities available for consultants and advisors

Interested in learning more about SmartVault? We recommend you also attend the SmartVault Workshop on Tuesday at 3:20 PM to get all of the tools you need to successfully design, plan and implement a move to SmartVault's online document management and file sharing service.

Method on Your Website: Portals, Web Forms and Knowledge Base

Instructor: Val Shabani

This session covers the following capabilities of Method:

1. Customer Portals - For customers to login to view account information, update billing information, view billing history and even make payments online.
2. Web Forms - To capture information from a public website directly into the Method database as either sales opportunities or support cases
3. Knowledgebase - To store questions and answers (and user registration information) in your Method database and host a pre-coded, interaction knowledgebase on the company's website.

Experience the turnkey power of Method's pre-integrated, pre-formatted website tools.

QQube (Part 2) (Expanded!)

Instructor: Chuck Vigeant

This session will continue to delve into the understanding of how the QQube data is organized, and will start off with deeper dives into simple subject areas such as Open PO and A/R and then progress to in depth examination of major subjects such as Sales, Job Costing, Inventory and General Ledger Detail. As a bonus, we promise to show you a few of the special goodies that are available for advanced users of QQube; and how to get started with some built-in examples.

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Instructor: TBD

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- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

This workshop requires separate registration.

Tuesday Course Descriptions

7:00 am Power Breakfasts

ScanWriter – Meeting the Challenges of Workflow and Data Entry Management in QBs and Excel **(New!)**
Instructors: Benjamin Chou

Address critical issues in your everyday accounting process for Accounts Receivable/Payable, Purchase/Sales Orders, after-the-fact bookkeeping, and more! Manually entering transactions one-by-one can be time consuming and tedious. With ScanWriter, you can enter 100's of transactions from bank/credit card statements, vendor invoices, and more into your accounting software in minutes. This exciting technology improves accuracy and simplifies your Bank Reconciliations process by automatically checking for duplicates, errors, and matching the QuickBooks transactions to you bank/credit card statements. During this session, you will learn how to

- Enter 100's of transactions in minutes
- Offer high quality bookkeeping services with faster turn-around time
- Manage bigger and more clients
- Learn the benefit of ScanWriter Cloud Edition

As an Intuit and Gold Certified Developer, Personable continues to revolutionize the accounting industry through technology.

Right Networks – Hosting Your Business in the Cloud: What's New with Right Networks in 2012

Instructors: Phil Romine

Right Networks takes you one step closer to moving everything to the cloud with the newest version of the Right Networks hosted desktop plus the addition of hundreds of new desktop and SaaS applications all delivered through Right Networks fully redundant infrastructure with no single point of failure. There are a wide variety of ways that your business can benefit from Internet-based services including document management, workflow solutions, sales force management, hosted accounting, and many others. Phil will focus on why hosted desktop solutions allow you to leverage many of the latest SaaS applications while enabling you to continue to use familiar desktop applications anywhere anytime. This flexible offering will allow you to bring your entire office online easily, reliably, and securely.

BigTime Software – How to Make More Money & Expand Your Practice Doing It.

Instructors: Brian Saunders

BigTime CEO Brian Saunders will introduce BigTeam, the newly launched network model designed by and for accountants to generate year-round revenue and enhance their value to existing clients. BigTeam is a next-gen consultant network that sends business to member partners, not the other way around. The session will describe how BigTeam works — from providing quality referrals and training to full marketing support — and lay out the criteria for ideal network candidates. Time will also be dedicated to soliciting your ideas for shaping the network's benefits so that it addresses business development needs not currently met in the marketplace.

This interactive session is one of two power breakfasts BigTime will host at the conference. Be sure to also explore "How to Become a Go-To Tech Resource for Your Clients," led by COO Jake Matyas, who'll provide a hands-on overview of BigTime's professional product, the only time and billing system embedded within Intuit's own practice management suite.

Concur – Add Profits to Your Practice with Cloud Services (New!)

Instructors: Bob Lewis

Wake up your profits by offering add-on cloud services to your clients. We'll share practical steps, tips and useful resources to help you plan and rollout a new cloud service offering to your existing and future clients. We'll use the Concur Advisor Program and expense management as an example scenario, but you can use this model with other solutions as well. The early birds will get the worm today!

Cloud9 Real Time – Together In The Cloud

Instructors: Bob Lewis

Do you understand how Cloud Computing works? Do you know how to implement a Virtual Office? Do you understand how your team and your clients can utilize Cloud technology to work more efficiently and profitably? This informative course is a "How To" on the transition to the Cloud. See how computing in a virtual environment can enhance your personal and business success while bridging the gap between Accountant and Client via dynamic computing methods.

10:00 am

New Features of QuickBooks Point of Sale Version 11 (New!)

Instructors: Steve Green and Will English

Intuit is working hard on the new version of QuickBooks Point of Sale (v11). If this product is available by June we will include a session in this timeslot that addresses the new features of the new version of QuickBooks Point of Sale - including Q&A with a representative from Intuit.

We will confirm this session as we learn more from Intuit about the timetable on their release of the new version of QuickBooks Point of Sale.

Troubleshooting QuickBooks – Top 10 Errors
Instructor: MB Raimondi

No matter how well we train our clients and how much support we provide them, our clients make mistakes. Mistakes fall into two broad categories: Mistakes made when setting up a QuickBooks data file and mistakes made during the day to day use of the file (data entry errors). This troubleshooting course focuses on the essential diagnostics you need to perform on your clients' files to locate the most common types of setup and data entry errors.

QuickBooks ProAdvisor: Certification Exam Preparation (Part 3) (New!)
Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QB Mac: The Basics (New!)
Instructor: Shelly Robbins

The Mac is Back - and in full force. The next generation of QuickBooks users will be increasingly use Macs - creating a significant increase in QuickBooks for Mac.

This session includes:
- Guidelines for recommending QuickBooks for Mac to your clients
- Basics of Consulting on a Mac
- Basics of Consulting on QuickBooks for Mac
- Best practices for consulting across platforms and maintaining healthy data files
- Annual tasks for maintaining healthy data files
- Resources for ongoing, up-to-date support

Building a Successful CFO and Advisory Practice (New!)
Instructor: Jennifer Katrulya

Many CPA and outsourced accounting firms advertise that they provide Outsourced CFO Services, but what does this really mean? If a company were publicly advertising for a CFO and listed their requirements for this position, would your firm be a truly qualified, top contender? We'll discuss the key differences between providing Outsourced Controller and accounting services vs. building an Outsourced CFO practice, and show you key steps you can take to truly build a winning CFO and Advisory Services practice in key industry verticals.

This session includes a mini-panel discussion by leading experts on running an outsourced CFO practice.

Fishbowl Inventory Deep Dive Part 1: Wholesale & Distribution
Instructor: Kendrick Hair

This two-part course goes "beyond the basics" of Fishbowl Inventory and prepares the accounting professional/consultant to be a member of the Fishbowl Recommender program. Through this course you will receive a high level but comprehensive look at the functionality of Fishbowl so you can qualify leads and make informed recommendations about Fishbowl to your clients.

Bill.com Expert Certification (New!)
Instructor: Judie McCarthy

The Bill.com Certification Program validates the skills you use every day, and transforms your practice to provide a competitive advantage in the marketplace. Each of the courses in our Certification program are designed and facilitated by Bill.com Gurus. Take advantage of these courses to take your practice to the next level.

The Bill.com Expert Certification Preparation Part 1 course explores advanced topics of using Bill.com and equips you to customize Bill.com to your and your client's business process.

You will learn to:

- Create custom user roles to set permission levels for Bill.com access
- Set up payments processing and managing exceptions in your A/P processing

Prerequisite: Bill.com Essentials training or equivalent knowledge

Xpanded Reports: It's Not Your Same Old QuickBooks Reports **(Expanded!)**

Instructor: Bonnie Nagayama

Reports are the cornerstone of any accounting system. QuickBooks accounting software is no different. But what do you do when the standard QuickBooks reports are just not enough? Do you continue exporting to Excel which has many limitations?

If you are looking for a browser based cloud solution that has the QuickBooks "look and feel" with "Excel type" functions included which gives you that ease of use you want and need, then XpandedReports should be given serious consideration. If you have not looked at XpandedReports recently, you have not seen anything: There are now more reports (including Profit & Loss, time with dollars, job reports, etc), more related data (including date paid in full, first purchase/sales date, last purchase/sale date, etc) and many more resources to support you (including webinars, short training videos, online documentation, etc).

Training Objectives:

- Understand the limitations of QuickBooks reporting
- Explore the different categories of Custom Reporting Options
- Examine how to easily solve the limitations of QuickBooks and Excel
- Recognize when there is an opportunity to solve a client need
- Discover several ways to differentiate you from other consultants

We recommend:

1. Designing Custom Reports for Your Clients (Sunday)
2. Xpanded Reports: How Many Reports Can We Create in 100 Minutes? (Tuesday)
3. Deep Dive with Xpanded Reports Workshop (Wednesday) - Requires Separate Registration

Method: Mastering Method CRM Part 1 **(New!)**

Instructor: Danny DoCouto

This is a two part session.

MethodCRM is a completely different application that the version publically available during last year's conference. Method gave Scaling New Heights a pre-release look at the new product in 2011.

Now, MethodCRM is built, has evolved through multiple new versions and is one of the most powerful QuickBooks-integrated CRM solutions in the market.

Training Objectives:

1. Managing Campaigns and Opportunities
2. Managing Leads
3. Case Management (e.g. client support and engagements)
4. Documenting Activities with Clients and Leads (e.g. phone calls, emails and meetings)
5. Maintaining a practice-wide calendar - with an all inclusive practice calendar

1. Integrating MethodCRM with Microsoft Outlook
2. ...and More!

QuickBooks Online Advanced Concepts (Part 1) (New!)

Instructor: Stacy Kildal

This workshop covers the more advanced functionality of QuickBooks Online - including:

QuickBooks Online Plus:

1) Purchase Orders
2) Location and Class Tracking
3) Inventory Tracking and Cost Accounting
4) Pass Through Time & Expenses
5) Billing/Expenses by Customer
6) Budgeting & Planning
7) Payroll, setup, what platform is it, run payday and reports

QuickBooks Online Accountant:

1) Sign Up Process
2) Client List
3) Accountant Center
4) Reconciliation Discrepancies Report
5) Identify when Auto-Adjustment has been used
6) Identify reconciliations that have changes to cleared transactions
7) View changes to cleared transactions
8) Undo Bank Reconciliations
9) Write Off Invoices In Batch
10) Batch Reclassify
11) Voided/Deleted Transaction Report
12) Making Adjustments In QuickBooks Online
13) Enter Adjusting Journal Entries
14) Review the Adjusted Trial Balance Report

The session requires separate registration.

Troubleshooting QuickBooks (Part 1)

Instructor: Laura Madeira

Participate in this six hour hands-on learning experience to sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant 2012. Troubleshooting techniques taught will focus on tools you will have access to while at the client site. The methods taught will complement the features and tools available with QuickBooks Accountant 2012 Client Data Review. Class size is limited to 20 participants with one instructor and one lab assistant. You must bring your own laptop with QuickBooks Premier Accountant 2012 installed with the latest release in order to participate. Sample data will be provided ahead of time for download with case studies prepared to use the troubleshooting skills taught, providing you a learning experience unmatched in lecture style learning. You will also receive a complimentary copy of the QuickBooks 2012 Solutions Guide, author and instructor Laura Madeira. The class learning will follow the outline of the book, allowing you to concentrate on the hands-on experience and less note taking. Learning Objectives After attending this course, you will be able to:

1) Troubleshoot proper entry of beginning balances.
2) Review your customers setup and make corrections as needed
3) Know how to get the reports needed to troubleshoot
4) Learn efficient methods of correcting your client's data

The session requires separate registration.

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Instructor: Victor Nahigian

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1) Introduction to a business plan:
    a. Sample Completed Business Plan
    b. Discuss there are only 10 main sections needed
    c. Do exercises about who we are, and what are company does
    d. Learn to write precise company overviews
2) Discuss Marketing Plan:
    a. Review “Made to Stick” book
    b. Discuss a precise plan – specifics
    c. Review where to get marketing reports
    d. Discuss demography, competitors
    e. Finish a marketing plan
3) Review Financial Statements:
    a. How to forecast sales
    b. Create a customized commission program
    c. Calculate labor hours and service sales
    d. Review overhead costs
    e. What is the “owner’s Cash Flow”
    f. Finalize Cash Flow, IS, and BS
4) Executive Overview
    a. What are the company goals
    b. Leave with a mission statement for your company
    c. Write the executive overview
    d. Detail your exit strategy
    e. Finalize Business Plan

Do you have questions about this workshop? Feel free to contact the workshop instructor Victor Nahigian at 617-965-4615 x110. The session requires separate registration.

Crystal Reports with QQube (Part 1)

Instructor: Chuck Vigeant

Crystal Reports allows you to design interactive reports from virtually any data source - including QuickBooks. This powerful, in-depth workshop provides 8 hours of hands on training. The first day of training covers the basics of report design for those with no experience using report design solutions. The second day applies the fundamentals of Crystal Reports to QuickBooks - where you will work through practical case studies to build commonly requested reports from a sample QuickBooks database.

The session requires separate registration.

Advanced Excel with QQube Workshop (Part 1) **(New!)**
Instructor: Mario Nowogrodzki

Learn to create and work with Pivot Tables to look at your QuickBooks data in a variety of ways - accessing QuickBooks data using the revolution QQube application by Clearify.

All registrants of this workshop receive a full license of QQube with your registration - a $500 value!

In this workshop you will discover how to perform a variety of calculations with Pivot Table Data. Understand how to find the underlying data that supports a figure. Learn to save time by re-using Pivot Table Reports as templates. You will learn to:

1) Create Pivot Tables using data from QuickBooks
2) Use Filters
3) Refreshing Data from QuickBooks
4) Change Pivot Table Fields
5) Display and Hide Data Manipulating Pivot Tables
6) Change Pivot Table Calculations
7) Create Complex Calculations
8) Work with the Raw Data Provided by QQube
9) Change Formatting
10) Save Pivot Tables Separately from the Source Data
11) Save Pivot Tables as Templates
12) Use Pivot Table Templates

The session requires separate registration.

ACCTivate Silver Certification Training (Part 3) **(New!)**
Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

This workshop requires separate registration.

1:00 pm

Expanding the Capabilities of QuickBooks Point of Sale **(New!)**
Instructor: Will English

Learn documented procedures to expand POS's market reach beyond the typical retailer.

Topics covered include using 3rd party software to add additional functionality such as scale integration, web stores, multi-location POS as well as processes designed to help the non- traditional retailer in industries such as Wineries.

QuickBooks Point of Sale: Pricing, Discounts, Price Levels and UOMs **(New!)**
Instructor: Steve Green

This session on QuickBooks Point of Sale covers sales pricing, price levels, discounts and unit of measure conversions - everything you need to handle the complex sale in QuickBooks Point of Sale.

QuickBooks ProAdvisor: Certification Exam Preparation (Part 4) **(New!)**
Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QB Mac: Beyond the Basics **(New!)**
Instructor: Shelly Robbins

This session drills down on the topics addressed in "QuickBooks for Mac: The Basics" and includes a question and answer segment with one of Intuit's QuickBooks Mac product managers on:

- General product functionality
- Market viability and the consulting opportunity around QuickBooks for Mac
- Intuit's vision and high-level product development goals for the Mac version of QuickBooks.

Developing a High Performance Team **(New!)**
Instructor: Jennifer Katrulya

A firm may have an incredible, well-documented Business Plan, a Marketing Plan that seems to guarantee success, and a well-known brand. Successfully "fulfilling the promise" requires the most important asset of all – top performing staff. In today's market the most qualified and motivated hires expect to be compensated for performance; they want to have clear opportunities for development and advancement; flexible work arrangements are increasingly important; and they want to be both inspired and appreciated by their managers.

In this session we'll walk you through a winning employee performance review process including ongoing Career Mapping and 360 degree feedback! We'll also guide you through key steps for recruiting top talent, starting or expanding your performance-based compensation options, and even managing remote staff.

Fishbowl Inventory Deep Dive Part 2: Manufacturing

Instructor: Kendrick Hair

This two-part course goes "beyond the basics" of Fishbowl Inventory and prepares the accounting professional/consultant to be a member of the Fishbowl Recommender program. Through this course you will receive a high level but comprehensive look at the functionality of Fishbowl so you can qualify leads and make informed recommendations about Fishbowl to your clients.

Bill.com Expert Certification (Part 2) (New!)

Instructor: Judie McCarthy

The Bill.com Certification Program transforms your practice and gives you a competitive advantage in the marketplace and validates the skills you use every day, and transforms your practice to provide a competitive advantage in the marketplace. Each of the courses in our Certification program are designed and facilitated by Bill.com Gurus. Take advantage of these courses to take your practice to the next level.

The Bill.com Expert Certification Preparation Part 2 course explores the advanced topics of using Bill.com and equips you to customize Bill.com to your and your client's business process. Optimize your processes to streamline workflow and save over 50% in time and costs.

You will learn to:

- Customize your A/R process for optimizing collections and documentation
- Differentiate the sync options for different accounting packages
- Optimize your use of Bill.com as you enhance your client's workflow processes

Prerequisite: Bill.com Expert Certification Preparation Part 1

Xpanded Reports: How Many Reports Can We Create in 100 Minutes? (Expanded!)

Instructor: Bonnie Nagayama

If you attended this session last year, then you know that this is where the real fun begins! Using real life client examples, we will work on creating reports. We will have a few to get you started, but bring your specific questions and we will see how many we can address during the session. Last year we did about 10 from the audience, can we beat that number this year? If you prefer, send an email to bonnie@4luvofbiz.com before the session with your request to jump to the front of the line. Come and learn about how XpandedReports can be your solution. With the simplicity of a QuickBooks-type look and feel, with the power of Excel, understand how this innovative tool can improve the way you and your clients access QuickBooks accounting data.

Training Objectives:

- Determine which report is the best starting point for creating a report.
- Compute columns for not just numerical calculations, but for other purposes too.
- Define what is possible (or not) when using XpandedReports
- Learn what resources exist to help you

Method: Mastering Method CRM (Part 2) (New!)

Instructor: Danny DoCouto

This is a two part session.

MethodCRM is a completely different application that the version publically available during last year's conference. Method gave Scaling New Heights a pre-release look at the new product in 2011.

Now, MethodCRM is built, has evolved through multiple new versions and is one of the most powerful QuickBooks-integrated CRM solutions in the market.

Training Objectives:

1. Managing Campaigns and Opportunities
2. Managing Leads
3. Case Management (e.g. client support and engagements)
4. Documenting Activities with Clients and Leads (e.g. phone calls, emails and meetings)
5. Maintaining a practice-wide calendar - with an all-inclusive practice calendar

4. Integrating MethodCRM with Microsoft Outlook
5. ...and More!

QuickBooks Online Advanced Concepts (Part 2) (New!)

Instructor: Stacy Kildal

This workshop covers the more advanced functionality of QuickBooks Online - including:

QuickBooks Online Plus:

1) Purchase Orders
2) Location and Class Tracking
3) Inventory Tracking and Cost Accounting
4) Pass Through Time & Expenses
5) Billing/Expenses by Customer
6) Budgeting & Planning
7) Payroll, setup, what platform is it, run payday and reports

QuickBooks Online Accountant:

1) Sign Up Process
2) Client List
3) Accountant Center
4) Reconciliation Discrepancies Report
5) Identify when Auto-Adjustment has been used
6) Identify reconciliations that have changes to cleared transactions
7) View changes to cleared transactions
8) Undo Bank Reconciliations
9) Write Off Invoices In Batch
10) Batch Reclassify
11) Voided/Deleted Transaction Report
12) Making Adjustments In QuickBooks Online
13) Enter Adjusting Journal Entries
14) Review the Adjusted Trial Balance Report

The session requires separate registration.

Troubleshooting QuickBooks (Part 2)

Instructor: Laura Madeira

Participate in this six hour hands-on learning experience to sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant 2012. Troubleshooting techniques taught will focus on tools you will have access to while at the client site. The methods taught will complement the features and tools available with QuickBooks Accountant 2012 Client Data Review. Class size is limited to 20 participants with one instructor and one lab assistant. You must bring your own laptop with QuickBooks Premier Accountant 2012 installed with the latest release in order to participate. Sample data will be provided ahead of time for download with case studies prepared to use the troubleshooting skills taught, providing you a learning experience unmatched in lecture style learning. You will also receive a complimentary copy of the QuickBooks 2012 Solutions Guide, author and instructor Laura Madeira. The class learning will follow the outline of the book, allowing you to concentrate on the hands-on experience and less note taking. Learning Objectives After attending this course, you will be able to:

1) Troubleshoot proper entry of beginning balances.
2) Review your customers setup and make corrections as needed
3) Know how to get the reports needed to troubleshoot
4) Learn efficient methods of correcting your client's data

The session requires separate registration.

Business Planning Workshop (Part 4 of 4)
Instructor: Victor Nahigian

In this powerful, hands on workshop you will enter the class with a blank Word document and leave with an established business plan specific to your firm and especially tailored for the QuickBooks ProAdvisor and accounting professional.

Curriculum for Business Planning Class

1) Introduction to a business plan:
    a. Sample Completed Business Plan
    b. Discuss there are only 10 main sections needed
    c. Do exercises about who we are, and what are company does
    d. Learn to write precise company overviews
2) Discuss Marketing Plan:
    a. Review “Made to Stick” book
    b. Discuss a precise plan – specifics
    c. Review where to get marketing reports
    d. Discuss demography, competitors
    e. Finish a marketing plan
3) Review Financial Statements:
    a. How to forecast sales
    b. Create a customized commission program
    c. Calculate labor hours and service sales
    d. Review overhead costs
    e. What is the “owner’s Cash Flow”
    f. Finalize Cash Flow, IS, and BS
4) Executive Overview
    a. What are the company goals
    b. Leave with a mission statement for your company
    c. Write the executive overview
    d. Detail your exit strategy
    e. Finalize Business Plan

Do you have questions about this workshop? Feel free to contact the workshop instructor Victor Nahigian at 617-965-4615 x110. The session requires separate registration.

Crystal Reports with QQube (Part 2)
Instructor: Chuck Vigeant

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The session requires separate registration.

Advanced Excel with QQube Workshop (Part 2) **(New!)**
Instructor: Mario Nowogrodzki

Learn to create and work with Pivot Tables to look at your QuickBooks data in a variety of ways - accessing QuickBooks data using the revolution QQube application by Clearify.

All registrants of this workshop receive a full license of QQube with your registration - a $500 value!

In this workshop you will discover how to perform a variety of calculations with Pivot Table Data. Understand how to find the underlying data that supports a figure. Learn to save time by re-using Pivot Table Reports as templates. You will learn to:

1) Create Pivot Tables using data from QuickBooks
2) Use Filters
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4) Change Pivot Table Fields

5) Display and Hide Data Manipulating Pivot Tables
6) Change Pivot Table Calculations
7) Create Complex Calculations
8) Work with the Raw Data Provided by QQube
9) Change Formatting
10) Save Pivot Tables Separately from the Source Data
11) Save Pivot Tables as Templates
12) Use Pivot Table Templates

The session requires separate registration.

ACCTivate Silver Certification Training (Part 4) (New!)

Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

This workshop requires separate registration.

3:20 pm

QuickBooks Point of Sale: Best Practices Panel

Moderator: Will English

This panel of experts – and seasoned QuickBooks Pont of Sale experts will share best practices for selling QuickBooks Point of Sale and providing QBPOS consulting services.

QuickBooks ProAdvisor: Certification Exam Preparation (Part 5) (New!)

Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QuickBooks Lagniappe: IPN, Multi-Currency, UOM, and Fixed Assets **(New!)**

Instructor: MB Raimondi

This session will cover some lesser used - but very powerful - features of QuickBooks. Because QuickBooks users do not always need these features, even the most seasoned QuickBooks ProAdvisor may have little or no working knowledge of these features.

This session will prepare you to consult with your clients on:

- Intuit Payment Network
- Multi-Currency Conversion
- Unit of Measure Conversion
- Fixed Asset Manager

100 Minutes with Tim and Jacint

Instructors: Jacint Tumacder and Tim Teichman

100 Minutes with Intuit's Top QuickBooks & Payroll Experts For those of you who crave time with the people who REALLY know QuickBooks and Payroll, here is your chance! Jacint and Tim have been working with QuickBooks and Payroll since joining Intuit in 1992 when they started with QuickBooks for DOS and QuickPay. They'll show their favorite tips and tricks, answer your questions as to WHY QuickBooks and Payroll behaves the way it does, and just generally help you "up your game" overall. They will also share what they are currently working on and get your thoughts and insights.

7 Minute Presentation Workshop (Part 1) **(New!)**

Instructor: Jennifer Katrulya

There are many aspects that must go into a winning sales presentation – the value proposition and benefits for the client need to be clear and powerful, and the presentation needs to be designed to get attention and results! A surprise to many practice owners is that the process of creating a sales presentation can also help provide significant insight into areas where the practice has clearly defined their offerings and systems vs. areas that are more difficult to explain because they may be inefficent and need improvement. In this session several BMRG University and Advisory clients will share their presentations with you and ask for your feedback! By participating in this session you'll also get the ideas and tools you need to define the Unique Value Proposition your firm provides, and begin preparing your own winning presentation.

"There's an App for That!"

Instructor: Michelle Long

Sales of iPads, Android tablets and others smart devices continue to increase – due mostly to the ever growing ecosystem of apps that run on these devices. In the small business community the apps that focus on productivity and company processes are most compelling.

This session focuses on apps that integrate with QuickBooks – designed for us as QuickBooks consultants and for our clients as QuickBooks users. This session will provide an overview of and introduction to relevant apps for collaboration, expense management, invoicing, time tracking, remote access …and more.

This session includes a demonstration of selected iPad apps.

Prerequisites: None

QuickBooks and e-Commerce

Instructor: Jim Savage

Web Stores are currently a very popular topic as companies look at reaching more customers through the Internet and selling their products online. Learn more about the many QuickBooks and QuickBooks POS integrated Web store solutions, and learn which ones are best suited for your client's specific needs.

Training Objectives:

1. A broad overview of e-commerce and its impact on accounting/finance
2. The Basic Components of e-commerce (Shopping Carts, Marketplaces, Merchant Processing etc.)
3. Demo: An accounting transaction from shopping cart to QB using Webgility
4. Accounting challenges and opportunities
5. Mini-Panel Discussion: A 15 Minute Panel with e-commerce experts and product developers

QuickBooks for Professional Service Firms: Tips, Power Reports and Best Practices

Instructor: Caren Schwartz

Working with lawyers, accountants, consultants and other professional services firms can be lucrative and interesting. Learn the areas that are important to professional services and how to make QuickBooks work for these organizations.

1) Handling Retainers: Whose money is it and how much do we have?
2) Capturing client costs and billing for client costs
3) Billing Rates: what you can and can't do
4) Tracking Employee Receivables

Method Sales and Pre-Sales Strategies

Instructors: Joe Woodard and Danny DoCouto

Method is an extremely configurable and veritable product. As a result, you will often find the sales process to present some unique challenges. Every Method engagement is a bit of a Pandora's box and if you do not properly set the scope, define the outcomes and document the specifications you will probably lose money. This course provides you with lessons from Joe's own experience selling numerous Method configuration packages over the past 3 years. If you are serious about incorporating Method consulting into your practice, come learn how to avoid some of the mistakes Joe made early on - mistakes that cost him thousands in unrealized billings!

QuickBooks Online Advanced Concepts (Part 3) (New!)

Instructor: Stacy Kildal

This workshop covers the more advanced functionality of QuickBooks Online - including:

QuickBooks Online Plus:

1) Purchase Orders
2) Location and Class Tracking
3) Inventory Tracking and Cost Accounting
4) Pass Through Time & Expenses
5) Billing/Expenses by Customer
6) Budgeting & Planning
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QuickBooks Online Accountant:

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10) Batch Reclassify
11) Voided/Deleted Transaction Report
12) Making Adjustments In QuickBooks Online
13) Enter Adjusting Journal Entries
14) Review the Adjusted Trial Balance Report

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Troubleshooting QuickBooks (Part 3)

Instructor: Laura Madeira

Participate in this six hour hands-on learning experience to sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant 2012. Troubleshooting techniques taught will focus on tools you will have access to while at the client site. The methods taught will complement the features and tools available with QuickBooks Accountant 2012 Client Data Review. Class size is limited to 20 participants with one instructor and one lab assistant. You must bring your own laptop with QuickBooks Premier Accountant 2012 installed with the latest release in order to participate. Sample data will be provided ahead of time for download with case studies prepared to use the troubleshooting skills taught, providing you a learning experience unmatched in lecture style learning. You will also receive a complimentary copy of the QuickBooks 2012 Solutions Guide, author and instructor Laura Madeira. The class learning will follow the outline of the book, allowing you to concentrate on the hands-on experience and less note taking. Learning Objectives After attending this course, you will be able to:

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SmartVault Master Class

Plan and Implement a Move to SmartVault

Instructors: Maureen Sahualla & Himanshu Pandya

MYTH: Having expertise in the area of online document management and file sharing won't do much to increase your billable service offering.

TRUTH: Most accounting firms and businesses drag their feet when it comes to implementing new technologies like online document management and portals for securely sharing files. Not because the technology is difficult to use, but because they have to STOP and THINK about several key changes to their business processes and workflows – and that can halt the process before it even gets started. Think about your own business – changing the way you do things today, even if you know you need to – can be challenging.

In this hands-on SmartVault workshop, you will walk away with the knowledge and tools you need to successfully design, plan and implement a move to SmartVault's online document management and file sharing service. We'll break the workshop down into two parts:

Planning and Design

We'll discuss each of these steps and their importance to successfully adopting SmartVault:

- Workflow analysis and documentation
- Vault and folder structure design
- File and folder naming rule definition and documentation
- Data analysis and data migration sizing

Set-up and Start Using!

You'll get hands on training as we walk through each of these key capabilities of the SmartVault service. We'll also cover the nuances of using SmartVault in a hosted environment:

- Creating your vault and folder structure
- Integrating with QuickBooks using the SmartVault Toolbar
- Configuring and using the SmartVault Drive
- Configuring and using a scanner to upload files
- Custom branding the SmartVault portal with your logo and color scheme
- Granting user permissions
- Configuring email notifications
- Sharing files using the new Plug-in for Microsoft Outlook

Crystal Reports with QQube (Part 3)

Instructor: Chuck Vigeant

Crystal Reports allows you to design interactive reports from virtually any data source - including QuickBooks. This powerful, in-depth workshop provides 8 hours of hands on training. The first day of training covers the basics of report design for those with no experience using report design solutions. The second day applies the fundamentals of Crystal Reports to QuickBooks - where you will work through practical case studies to build commonly requested reports from a sample QuickBooks database.

The session requires separate registration.

Advanced Excel with QQube Workshop (Part 3) (New!)

Instructor: Mario Nowogrodzki

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4) Change Pivot Table Fields
5) Display and Hide Data Manipulating Pivot Tables
6) Change Pivot Table Calculations
7) Create Complex Calculations
8) Work with the Raw Data Provided by QQube
9) Change Formatting
10) Save Pivot Tables Separately from the Source Data
11) Save Pivot Tables as Templates
12) Use Pivot Table Templates

The session requires separate registration.

ACCTivate! Silver Certification Training (Part 5) (New!)

Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

The session requires separate registration.

Wednesday Course Descriptions

7:00 am Power Breakfasts

ScanWriter – Hands-on ScanWriter, SourceLink, and Workflow DMS Training Workshop (New!)

Instructors: Benjamin Chou

Interactively experience how to implement award-winning solutions into your business and your clients'. Learn how to solve your clients' needs and offer solutions that you have experienced firsthand. Personable will present instructions on how to successfully implement software that automates data entry, electronic document management, and internal control set-up. You are invited to bring your own bank and credit card statements, along with your laptops, to experience the software solutions. During this session, Personable will offer:

- Workshop copies of ScanWriter, SourceLink, and Workflow DMS
- Demo computers and scanners will be available
- Sample statements and company files
- Step-by-step instructions

As an Intuit and Gold Certified Developer, Personable continues to revolutionize the accounting industry through technology.

Right Networks – Hosting Your Business in the Cloud: What's New with Right Networks in 2012

Instructors: Phil Romine

Right Networks takes you one step closer to moving everything to the cloud with the newest version of the Right Networks hosted desktop plus the addition of hundreds of new desktop and SaaS applications all delivered through Right Networks fully redundant infrastructure with no single point of failure. There are a wide variety of ways that your business can benefit from Internet-based services including document management, workflow solutions, sales force management, hosted accounting, and many others. Phil will focus on why hosted desktop solutions allow you to leverage many of the latest SaaS applications while enabling you to continue to use familiar desktop applications anywhere anytime. This flexible offering will allow you to bring your entire office online easily, reliably, and securely.

BigTime Software – How to Become a Go-To Tech Resource for Your Clients.

Instructors: Jake Matyas

Are you seeking ways to become more tech-savvy in the eyes of your clients? Whether you're looking to enhance the value of your advisory services to existing clients, or are interested in opportunities to bring in new ones, the information presented in this session will equip you to help your clients take advantage of tools that make their lives easier. BigTime COO Jake Matyas will walk you through how fast and simple it is to get started on one of the most popular time and billing systems today, leading an overview of BigTime basics that includes: creating your first project; logging time in the system; expense report basics; creating a simple invoice; and posting invoices to QuickBooks.

This hands-on demo is one of two power breakfasts BigTime is hosting at the conference. Be sure to also check out "How to Make Money and Expand Your Practice Doing It," led by BigTime CEO Brian Saunders, that takes a look at the company's new, no-cost referral network, BigTeam.

Wasp Technologies – QB Codes - A Dying Fad or is Misuse and Abuse to Blame

Instructors: Grant Wickes

QR Codes – those square barcodes made with blotches of white and black – have been used in newspapers, magazines and retail stores. Put them on business cards. Scan to get more information. Get a special promotion. The use seems limitless. However, like many new technologies is the hype greater than the benefit? Interest seems to be fading. Are they destined to be lost and relegated to the dust bin? Or are they just suffering from misuse and abuse?

In this session, we'll step back and explain what barcodes are. How they work. Where they can be used? What's the difference between a UPC, a Code128 and a QR Code? Learn how this useful piece of technology can actually help your clients save time and be more efficient.

We'll spend time reviewing various implementations of QR Codes. Some examples will make you laugh. Some will make you cry. Some will have you marveling in their ingenuity. We'll demystify this 60 year old technology. You may not be a barcode expert when you leave, but you'll definitely walk away with some ideas to help your clients better understand and use barcodes to save time and money.

Office Tools Professional – Workflow & Automation: The Processes That Defines Our Business

Instructors: Matthew Martens

How defining a consistent set of steps that that encompass a body of work, can not only improve firm efficiency but can also lead to much higher staff productivity.

How to best implement a workflow system and what tools are needed to be successful.

- What is Workflow?
  - Step by step processes within each project/engagement.
  - Centralization of information for the entire office.
  - Ability to monitor and delegate the work load of staff and yourself

- How to implement Workflow?
  - Define workflow processes for each type of service that need to be reviewed or changed.
  - Invite others to be a part of the process.
  - Test the new processes with one service, before implementing all of them.

- Best Practices
  - Build consistent procedures and processes.
  - Apply changes throughout the firm.
  - Embrace new technologies and ideas.

Learning Objectives

- Learn what defines workflow in the accounting/tax firm
- Learn how to implement a work flow system
- Learn how to incorporate best practices

10:00 am

QuickBooks Point of Sale: Tips and Tricks

Instructor: Steve Green

This is intended to be both an instructor led and audience participation course. Over the years, a handful of time saving and useful process and procedures have come up that are not otherwise well addressed in QBPOS. Come see what we have come up with and given time, perhaps share some of your own.

Training Objectives:

- Tricky transactions from QBPOS in QBFS
- Often requested but hard to get reports
- Borrowing the use of QBPOS features for unintended functionality
- Audience sharing of unique solutions

QBPOS End to End: Multi-store

Instructor: Will English

Learn how multi-store works, including best practices for implementation and other important strategies.

Training Objectives:

- Activities by store type
- Special order items
- Understanding store exchange
- Configuring initial exchanges
- Routine store exchange
- Troubleshooting store exchange

QuickBooks ProAdvisor: Certification Exam Preparation (Part 6) **(New!)**
Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QuickBooks Topic TBD
We are exploring several ideas for this training block. Check back later for more information.

QuickBooks Data File Management – Best Practices
Instructor: Mario Nowogrodzki

Learn some of the behind-the-scenes of QuickBooks data files, the ins and outs of file size considerations, tricks on how to speed up QuickBooks, how types and uses of QuickBooks affect performance, and best practices for troubleshooting problem files. We will also discuss what to do to minimize and prevent data integrity loss and review QuickBooks backup options.

7 Minute Presentation Workshop (Part 2) **(New!)**
Instructor: Jennifer Katrulya

Note: This is a two part session. Participation in Part 1 is required.

We'll share with you vendor-provided and other instructor-prepared slides that you can use along with other tips we'll share with you so that you can create your own presentation!

Then, pre-selected attendees will deliver their presentations during the session. We will coordinate with everyone who registers for this session prior to the conference so we can learn which attendees want to present and so we can group attendees into teams - by firm profile.

The first 45 minutes of this session will be dedicated to preparing the presentations. During the second half of the session, the 3 groups will share what they've prepared! At the end of this workshop all attendees will have the option to request an email of each of the group presentations!

Social Networking Panel **(New!)**
Moderator: CPA Practice Advisor

This session focuses on growing your practice through social networking sites like LinkedIn, Twitter, Facebook and more.

Fishbowl Introduction: What it Does and Where it fits **(New!)**
Instructor: Kendrick Hair

Fishbowl has been the #1 requested add-on package to QuickBooks for years. This class will show you exactly, what Fishbowl adds to QuickBooks and will give you a brief introduction to all the new Fishbowl Products, i.e. SalesPoint (Fishbowl's new POS), Pipeline (our new CRM), Fishbowl Mobile Warehouse (our barcoding solution), and the Fishbowl Partner Program. This class will be repeated twice.

Method Consulting Strategies Panel
Moderator: Joe Woodard

Method configuration engagements are often very complex and very time consuming exercises. As a result, you must leverage proven strategies to manage the project (and manage the client relationship) if you are going to stay on schedule and on budget with your engagement. This session will empower you in your Method consulting with practical, proven strategies - from our expert panel of experienced Method Solution Providers.

Intuit FSMES Workshop (Part 1) **(Expanded!)**

Instructor: Mike Simons

Intuit Field Service Management ES (FSMES) is one of Intuit's best kept "secrets" and one of the ProAdvisors most practical options for expanding the services you offer to your clients.

Many ProAdvisors who consult on all of the Intuit product line (e.g. QB, QBPOS and even QuickBase) have not yet embraced the consulting opportunity afforded by FSMES.

With this workshop you can leave the conference equipped to implement FSMES and integrate the application with QuickBooks Enterprise Solutions.

This course covers basic to intermediate concepts of FSMES - with end to end training on the functionality of the product.

Those who have never worked with the product before will learn from the ground up. Those with some experience with the product will sharpen their skills to better support their clients.

This is one workshop every Intuit Advisor cannot afford to miss!

The session requires separate registration.

QuickBooks Inventory Workshop (Part 1) **(New!)**

Instructor: MB Raimondi

This workshop walks you through advanced features of QuickBooks inventory including unit of measure conversations and variable assemblies (QBES) - and includes extensive training on the features of QuickBooks Enterprise Advanced Inventory (QBES AI) like FIFO inventory valuation, enhanced inventory receiving, location tracking and serial number/lot tracking.

This workshop also covers inventory tips and tricks to stretch QuickBooks for use in a warehouse environment and advanced inventory reporting.

The session requires separate registration.

Crystal Reports w/QQube (Part 4)

Instructor: Chuck Vigeant

Crystal Reports allows you to design interactive reports from virtually any data source - including QuickBooks. This powerful, in-depth workshop provides 8 hours of hands on training. The first day of training covers the basics of report design for those with no experience using report design solutions. The second day applies the fundamentals of Crystal Reports to QuickBooks - where you will work through practical case studies to build commonly requested reports from a sample QuickBooks database.

The session requires separate registration.

Transaction Pro Importer Workshop (Part 1) **(New!)**

Instructor: John Magno

This course will provide in depth coverage of Transaction Pro Importer and Exporter for QuickBooks. This advanced seminar will dig deep into the advanced and hidden features of the product. Learn how to save your clients time and money by implementing these tools in their daily workflow. Recommended for existing users of Transaction Pro Importer or those attending the previous track.

The course will cover the following topics:

- Connect and read to the various file formats that work with the product
    - Microsoft Excel
    - CSV
    - Text formats
    - Microsoft Access
    - ODBC databases like MySQL, SQL Server and Oracle
    - How to setup and connect to a SQL Server database through ODBC
    - Quicken and Microsoft Money

- How to implement the dozens of options
    - Customer, vendor and item cross referencing
    - Skip or replace existing transactions
    - Custom fields
    - Do not add new customers, vendors, items, etc.
    - Ecommerce options
    - Enabling and mapping column values as new transaction lines
- Importing Bank Transactions
    - Field Mapping
    - Payee Alias Management
    - Tips and tricks
- Best Practices for recording sales tax on transactions
    - Sales Tax as a separate transaction line in QuickBooks
    - Sales Tax calculated using the Sales Tax Item and sales tax codes
- Importing data from ecommerce files
    - Using the ecommerce options
    - Mapping columns as data rows
    - Shipping, handling, discount and sales tax implications
- Importing Journal Entries
    - Tips and best practices to be aware of
    - Troubleshooting
    - Options to map debit/credit to single field and provide offset account
- Command Line options and why you should use them
    - Setting options through command line options
    - Automating Imports - using the /AUTORUN option to run Transaction Pro automatically
    - Writing a simple batch file to set command lines and run Transaction Pro
- Moving transactions from one QuickBooks file to another
    - Using Transaction Pro Exporter 5.0 to get the transactions you want
    - Best practices
    - Using Excel to further filter your data
    - Where to find the map files to save time
    - Troubleshooting tips
- Case studies that will allow you to realize the multitude of ways that TPI can be used to save your clients time
- Question and answer session – ask your questions and provide feedback and feature requests directly to the developer.

The session requires separate registration.

Bill.com Guru Certification Preparation (Part 1) (New!) *(Repeat)*

Instructor: Judie McCarthy, Bill.com

In the Bill.com Guru Certification Preparation workshop, you learn the concepts involved in building a highly profitable bookkeeping practice. With interactive discussions, hands-on activities, and exercises, participants become equipped to utilize cloud based technologies to take action anytime, anywhere. In this workshop, you will:

- Evaluate existing business processes and plan to re-engineer for efficiency
- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

The session requires separate registration.

Xpanded Reports Workshop: Deep Dive (Part 1) (New!)

Instructor: Bonnie Nagayama

This deep dive on Xpanded Reports provides workshop attendees with hands on exposure to the product and is designed to equip you to provide Xpanded Reports consulting services and report design services for your clients.

This workshop will walk you through the design of numerous reports - with case studies incorporated from your instructors own experience working with her clients.

The session requires separate registration.

ACCTivate! Silver Certification Training (Part 6) (New!)

Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

The session requires separate registration.

1:00 pm

QBPOS Fundamentals (Part 1) – (*Repeat)*

Instructor: Steve Green

This is a two part session.

Intended as topical introduction, this course is designed to help you gain a high level understanding of almost all the features of QBPOS as well as what the end-user experience might generally be like.

This two part session covers:

- Product versions and levels introduction
- Understanding item types
- Vendor and Purchasing functions
- Customer and sales
- Lesser known features
- Understanding peripheral hardware
- Cash Drawer Reports/End of Day

QBPOS End to End: Physical Inventory
Instructor: Will English

Taking a physical inventory is a crucial part of running a retail establishment. Gain an understanding of both the big picture as well as the intricate and subtle details of how this process can be managed in QBPOS

Training Objectives:
- Methodologies
- Advance Planning and Preparation
- Adding Counts by Hand
- Using a Physical Inventory Scanner
- Posting implications in QBPOS

QuickBooks ProAdvisor: Certification Exam Preparation (Part 7) (New!)
Instructor: Dawn Brolin

This is an eight-part session.

This track at Scaling New Heights covers the training objectives of the official QuickBooks ProAdvisor Program Certification course available - with curriculum provided by Intuit, Inc.

This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks ProAdvisor Certification Exam.

For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QuickBooks Tips, Tricks and Custom Processes (Part 1) – *(Repeat)* (Expanded!)
Instructor: Michelle Long

This is a two part session.

Every year, Intuit infuses QuickBooks with a wide range of new features. However, it is not realistic to expect Intuit to meet 100% of our client's business-specific and industry-specific needs with each new version. So...as QuickBooks consultants we have to think creatively - to provide our clients with tips, tricks and custom processes. This in-depth technical presentation covers essential QuickBooks Tips, Tricks and Custom Processes to help you stretch QuickBooks to meet your client's business-specific needs.

Note: This session is repeated. We also offer this session on Monday afternoon.

QBO Consulting Strategies (New!)
Moderators: Woody Adams

Join moderator Woody Adams and members of the Intuit Online Accountant Advisor Network as they discuss best practices and take questions about working with QBO clients.

The One Year Marketing Plan (New!)
Instructor: Jennifer Katrulya

How would you feel if you could leave this conference with your next 12 months of marketing strategy defined and ready to implement? We'll help you do just that! In this session we'll discuss how to build your prospect mailing and e-mail lists, how to use solutions like Constant Contact® and social media to create high-impact, low cost marketing campaigns, and how to turn your website into a high-impact marketing and platform. We'll also demonstrate how to use some of today's leading CRM solutions to manage your marketing efforts and most importantly measure your results!

Increasing Your Web Presence and SEO Optimization Panel
Moderator: Gail Perry

This session focuses on ways to increase the presence of your firm and your firm's website on the web. Strategies covered include search engine optimization.

Fishbowl Introduction: What it Does and Where it fits (New!)
Instuctor: Kendrick Hair

Fishbowl has been the #1 requested add-on package to QuickBooks for years. This class will show you exactly, what Fishbowl adds to QuickBooks and will give you a brief introduction to all the new Fishbowl Products, i.e. SalesPoint (Fishbowl's new POS), Pipeline (our new CRM), Fishbowl Mobile Warehouse (our barcoding solution), and the Fishbowl Partner Program. This class will be repeated twice.

Method Advanced Tips and Tricks (Part 2) (New!)
Instructor: Joe Woodard

This is a two-part session. Part one is on Monday.

Joe Woodard has personally logged thousands of hours configuring Method for his clients. Over the past year Joe has also built a multi-professional Method consulting firm, managing some of the most complex Method implementations in the country.

In this two part session Joe will share creative and practical uses of Method actions, objects and screen settings (i.e. forms) - from his own experience conducting Method consulting engagements for his clients.

Prerequisites: Attendance in One Method Level 2 Certification Bootcamp

We also recommend:

1. Method 301: Advanced Concepts (Sunday)
2. Method Sales and Pre-Sales Strategies (Tuesday)
3. Method Consulting Strategies Panel (Wednesday)

Intuit FSMES Workshop (Part 2) (New!)
Instructor: Mike Simons

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Instructor: MB Raimondi

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This workshop also covers inventory tips and tricks to stretch QuickBooks for use in a warehouse envrionment and advanced inventory reporting.

The session requires separate registration.

webKPI Dashboard Designer (Part 1) **(New!)**
Instructor: Joe Lindsey

Business intelligence is about bridging the gap between the data collected and what data business people need to drive the business and improve. How the coach can use a Gartner rated "Magic Quadrant" applications that was formerly for the Fortune 100 to lead their clients.

The session will demonstrate how to create a winning strategy that:
- Enables the coach to stay in synch with their clients and monitor closely changes in condition
- Drives data using mobile, tablets and PDF Binders to those off network with open action items or status reports
- Reduce dependence on Excel for critical information sharing and avoid costly Excel errors
- Link reporting to non-QuickBooks data such as Method, CRM and other operational data

The session requires separate registration.

Transaction Pro Importer Workshop (Part 2) **(New!)**
Instructor: John Magno

This course will provide in depth coverage of Transaction Pro Importer and Exporter for QuickBooks. This advanced seminar will dig deep into the advanced and hidden features of the product. Learn how to save your clients time and money by implementing these tools in their daily workflow. Recommended for existing users of Transaction Pro Importer or those attending the previous track.

The course will cover the following topics:

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    - Options to map debit/credit to single field and provide offset account
- Command Line options and why you should use them
    - Setting options through command line options
    - Automating Imports - using the /AUTORUN option to run Transaction Pro automatically
    - Writing a simple batch file to set command lines and run Transaction Pro
- Moving transactions from one QuickBooks file to another
    - Using Transaction Pro Exporter 5.0 to get the transactions you want

- o Best practices
- o Using Excel to further filter your data
- o Where to find the map files to save time
- o Troubleshooting tips

- Case studies that will allow you to realize the multitude of ways that TPI can be used to save your clients time
- Question and answer session – ask your questions and provide feedback and feature requests directly to the developer.

The session requires separate registration.

Bill.com Guru Certification Preparation (Part 2) (New!) *(Repeat)*

Instructor: Judie McCarthy, Bill.com

In the Bill.com Guru Certification Preparation workshop, you learn the concepts involved in building a highly profitable bookkeeping practice. With interactive discussions, hands-on activities, and exercises, participants become equipped to utilize cloud based technologies to take action anytime, anywhere. In this workshop, you will:

- Evaluate existing business processes and plan to re-engineer for efficiency
- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

The session requires separate registration.

Xpanded Reports Workshop: Deep Dive (Part 2) (New!)

Instructor: Bonnie Nagayama

This deep dive on Xpanded Reports provides workshop attendees with hands on exposure to the product and is designed to equip you to provide Xpanded Reports consulting services and report design services for your clients.

This workshop will walk you through the design of numerous reports - with case studies incorporated from your instructors own experience working with her clients.

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ACCTivate! Silver Certification Training (Part 7) (New!)

Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.

- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

The session requires separate registration.

3:20 pm

QBPOS Fundamentals (Part 2) – Repeat

Instructor: Steve Green

This is a two part session.

Intended as topical introduction, this course is designed to help you gain a high level understanding of almost all the features of QBPOS as well as what the end-user experience might generally be like.

This two part session covers:

- Product versions and levels introduction
- Understanding item types
- Vendor and Purchasing functions
- Customer and sales
- Lesser known features
- Understanding peripheral hardware
- Cash Drawer Reports/End of Day

QBPOS End to End: Accounting Integration

Instructor: Will English

Understand the details of how and why thing post from QBPOS to QBFS the way they do with a general understanding of what to do with them when they get there. Plus, what causes things to fall out of balance between the two systems.

Training Objectives:

- How the sync Happens
- Account mapping and options
- How transactions post to QBFS
- QBPOS Entries that Impact QBFS and what to do with them
- Causes of inventory (and other) valuation discrepancies between QBPOS and QBFS

QuickBooks ProAdvisor: Certification Exam Preparation (Part 6) **(New!)**

Instructor: Dawn Brolin

This is an eight-part session.

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For more information about this special track contact us at 404-857-0700.

Prerequisites: None

QuickBooks Tips, Tricks and Custom Processes (Part 2) – *(Repeat)* **(Expanded!)**

Instructor: Michelle Long

This is a two part session.

Every year, Intuit infuses QuickBooks with a wide range of new features. However, it is not realistic to expect Intuit to meet 100% of our client's business-specific and industry-specific needs with each new version. So...as QuickBooks consultants we have to think creatively - to provide our clients with tips, tricks and custom processes. This in-depth technical presentation covers essential QuickBooks Tips, Tricks and Custom Processes to help you stretch QuickBooks to meet your client's business-specific needs.

Note: This session is repeated. We also offer this session on Monday afternoon.

Leveraging the QBO Ecosystem for Your Clients **(New!)**

Instructor: Stacy Kildal

This session is an overview of some of the growing list of applications that integrate with QuickBooks - highlighting the most popular QBO add ons available to help you grow your practice and streamline workflow for you and your QBO clients.

The session will provide an overview of numerous applications, with a special focus on:

1. SOS Inventory
2. Bill.com
3. AuditMyBooks
4. Baystate Consulting's Transaction Pro Importer
5. Intuit Online Payroll for Accountants
6. ...and more!

The Legalities of the Client-Consultant Relationship **(New!)**

Instructor: Jennifer Katrulya

Owning and running a client accounting services and/or technology consulting practice (or any other business) can be rewarding and exhausting all at once. We're busy providing superior client service, managing finances and staff, and putting out fires each day. As a trusted advisor for your clients, you likely advise them to consider important ways that they should protect their business interests, including ensuring they have enough of the right types of insurance coverage, that they have considered important contracts such as buy-sell, non-compete and other corporate agreements, and perhaps even the importance of pre-nuptial or post-nuptial agreements, estate planning, and other "personal life' planning needed to protect the business. You've also likely discussed sales tax and payroll compliance, financial and retirement planning, technology and operational disaster plans, and more. Have you taken the same steps to plan for the future and also ensure that your practice is protected in case of an unexpected event? You'll leave this session with checklists you can use in your practice and information from industry leading professionals that will help you protect the company you are working so hard to build.

10 Reasons to Fire a Client **(New!)**

Instructors: Diana Cohn and Val Barshaw

In our firms we all know the problem clients - those who are fee sensitive, slow to pay, quick to point fingers...etc.

As practitioners we must apply objective criteria with each of our clients - to determine if your practice should continue working with a client or discontinue the relationship.

This session focuses on 10 reasons to consider "firing" your clients - and how to manage the delicate process of severing the relationship.

Networking QuickBooks – Best Practices

Instructor: Mario Nowogrodzki

Understanding the best configurations for networks and servers are a requirement for effective QuickBooks consulting. Whether completing IT tasks yourself or communicating with IT specialists, you need to be more than familiar with IT concepts. In this session, we will build on fundamental networking concepts and discuss implementation scenarios and best practices for QuickBooks networking. Some of the concepts to be covered include Remote Desktop Server (formerly Terminal Server), VPNs, and virtualization, so you'll know when and how to use them.

Method Application Showcase

As a highly configured online database, Method is a platform for the development of software applications. The ever growing Method developer community (called Method Solution Providers) is producing a wide range of QuickBooks integration applications. Since most of these applications are designed for specific clients, the applications are not available for purchase or even for demonstration. So, this is the chance for MSPs to show other consultants what they have built. It is our hope this session will become an annual event and that the session will inspire new creative uses of Method within your practice. We will present an award to the MSP who demonstrates the "best'" new Method application.

Intuit FSMES Workshop (Part 3) **(Expanded!)**
Instructor: Mike Simons

Intuit Field Service Management ES (FSMES) is one of Intuit's best kept "secrets" and one of the ProAdvisors most practical options for expanding the services you offer to your clients.

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Instructor: John Magno

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The session requires separate registration.

Bill.com Guru Certification Preparation (Part 3) **(New!)** ***(Repeat)***

Instructor: Judie McCarthy, Bill.com

In the Bill.com Guru Certification Preparation workshop, you learn the concepts involved in building a highly profitable bookkeeping practice. With interactive discussions, hands-on activities, and exercises, participants become equipped to utilize cloud based technologies to take action anytime, anywhere. In this workshop, you will:

- Evaluate existing business processes and plan to re-engineer for efficiency
- Implement new strategies to increase automation in your practice
- Learn how other firms are using Bill.com to achieve maximum benefits
- Develop profitable pricing strategies
- Complete an Action Planning worksheet and implementation plan for expert review

Please bring your laptop to the session.

Prerequisite: Bill.com Expert Certification Preparation Parts 1 & 2

The session requires separate registration.

Deep Dive with Xpanded Reports Workshop (Part 3) **(New!)**

Instructor: Bonnie Nagayama

This deep dive on Xpanded Reports provides workshop attendees with hands on exposure to the product and is designed to equip you to provide Xpanded Reports consulting services and report design services for your clients.

This workshop will walk you through the design of numerous reports - with case studies incorporated from your instructors own experience working with her clients.

The session requires separate registration.

ACCTivate! Silver Certification Training (Part 8) **(New!)**

Instructor: Alterity - Developers of ACCTivate

This is an 8 Part Workshop.

ACCTivate! executive, sales, development, administrative and support staff will conduct classes and interactive learning sessions to help QuickBooks Advisors and CPAs expand their knowledge of inventory management and how to build an inventory management practice.

Learning Objectives

- Better understand your own personality style through a statistically-based survey. Learn how to use this knowledge to improve communication effectiveness, enhance your business development skills and improve your consulting effectiveness with others, regardless of personality styles.
- Learn inventory management techniques that can dramatically improve your clients' profitability.
- Learn about the wholesale/distribution – supply-chain markets, and how small and medium-sized businesses compete successfully by leveraging technology.
- Learn how to expand your market and differentiate your business by focusing on inventory management and supply chain management.
- Learn how ACCTivate! functions, the problems we solve for our small to medium-sized customers, and the role you can play in helping them grow and expand their markets.
- Learn how we manage the systems conversion project, and how you can help the client with change management, and business process reengineering to improve efficiencies.
- Develop relationships with other QuickBooks Advisors, consultants, inventory management experts, and other specialists with who you can network to share ideas, information, and solutions.

The session requires separate registration.