sage Summit

Perform at Your Best

Choose from product, hands-on and thought leadership sessions.

Sage Summit US

There are six distinct content tracks, including a main Product Innovation track with 5 sub-tracks totalling 78 breakout sessions at Sage Summit US. Get the insights you need to perform at your best with this sessions content guide. Breakouts are subject to change and sessions may be added or removed. Please see session descriptions below to learn if a specific session is eligible for CPE credit.

Due to limited capacity, we strongly advise all attendees to pre-select their breakout sessions.

Breakout session tracks:

- Product Innovation

  o Product Innovation: Accountants

  o Product Innovation: Small Segment

  o Product Innovation: Sage 100/100cloud

  o Product Innovation: Sage 300/300cloud

  o Product Innovation: Business Management

- Hands-on-Learning

- Executive-to-Executive

- Sponsor Showcase

- Sage Timeslips Partners

- Sage Certifications

Product Innovation Track

The main Product Innovation track will consist of 5 sub-tracks totalling in 49 sessions and will be offered on Wednesday, December 9 – Friday, December 11. These sessions are broadly applicable and focus on new capabilities, product migration, best practices, and customer success with our Sage Solutions.

Please review session descriptions to learn if the session is CPE eligible.

Product Innovation: Accountants Focused on helping accounting professionals learn how Sage can enable their practice to thrive, learn best practices and industry updates.

Title	Abstract	Speaker	Level
Selling Your Brain NOT Your Time: Subscription Pricing for Accounting Professionals	This session is dedicated to the possibility that a professional firm will be more effective for its customers if it begins to sell not hours or service, but access to the brains of the professionals. Creating subscriptions for access is hard work and not for everyone because it requires professionals to think differently than they have in the past about what it is they really do and sell. If you think you have what it takes to make this shift or are just curious about it, you are hereby invited to open a dialogue about how best to alter this language by Ed Kless, Sage's senior director of partner development and strategy, who will facilitate this session. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Ed Kless, Sage	Introductory
The Simple Complexity of Automation and RPA (Robotic Process Automation)	This Sage Summit session is for accountants to understand the basic foundations of RPA (Robotic Process Automation) and the immense value that this technology brings not only within innovation of technology but the innovation of your business holistically. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Rafael Casas, Sage Tom Port, AutoEntry	Introductory
Innovation Mindset	Understand how the need for innovation has directly impacted professional service firms in today's business climate. Learn the 3 principles that need to be deployed to accelerate the growth of your organization and how to align the vision, technology, and people to drive innovation and create lasting change. From getting started, building the team, driving accountability, and developing your MVP, learn the processes needed to usher in a change. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Garrett Wagner, C3 Evolution Group	Introductory
The ONLY Place Time Spent Should Matter is Prison: Trashing the Timesheet	This session will be dedicated to the possibility that a professional firm will achieve better results for its customers and be more profitable when it eliminates the timesheet. Creating such an organization is hard work and not for everyone. It requires us to think differently than we have in the past about what it is that we do. You are hereby invited to open a dialogue on a different model for a professional firm. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Ed Kless, Sage	Introductory
The Business Model, moving up the value chain	As you transform your firm into higher level services, knowing the value of those services is key. During this session, we will focus on one of the pillars of the Sage San CAS program- Packaging Pricing. We will focus on how to value your services based on the market and your client's perceptions, rather than the amount of time or effort. With a menu of services and proven packaging and pricing strategies, you'll be able to simplify the process while bringing your client experience to a higher value proposition. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	L. Gary Boomer, Boomer Consulting	Intermediate

Entrepreneurial CPA: The New Skills Needed	As the industry shifts from a compliance to advisory mindset the skills needed has changed. Learn the new entrepreneurial skills needed to succeed in today's CPA landscape. These are the critical skills people of all levels need to provide outstanding client service and power the transition to high value advisory services. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Garrett Wagner, C3 Evolution Group	Introductory
Practice of Now Panel Discussion	The 4th edition of our Practice of Now research was launched on May 13th. The survey asks questions of 3,250 respondents from the UK (1000), US (1000), Canada (250), Australia (250), France (250) Spain (250) and ZA (250). In this session, our panel of profession experts will discuss the story behind the numbers and make some suggestions as to what you can do to make your practice more future-ready. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Ed Kless, Sage L.Gary Boomer, Boomer Consulting A.Z. Zabala, Sage Shayna Chapman, Shaynaco LLC	Introductory
Scope: It is not just mouthwash	This session will be dedicated to the possibility that organizations that get great at developing scope documents create greater success for their customers. Creating a truly great scope document is not easy as it requires more energy to be expended earlier in the implementation than is usual. If you think you have the capability to sharpen your scoping skills, you are invited to participate in this gather about how best to create a scope document. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Ed Kless, Sage	Introductory

One-hour educational sessions focused on new capabilities, best practices and tips and tricks for our Sage 50/50cloud solutions.

Title	Abstract	Speaker	Level
Discover Top 10 New Features in Sage 50 Accounting	Sage truly values your input when deciding which new features and enhancements to add to Sage 50 Accounting. Join this session to see the 10 top features that have been voted on by customers and implemented in our most recent releases. After participating in this session, you will be able to: Determine which features to start using. Describe new functionality to peers and co-workers. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Nakia Christian, Sage	Introductory
Unlock the true potential of your business data with Sage 50 Accounting Intelligence	In this session, you'll learn how to take advantage of the powerful reporting capabilities of Sage 50cloud Intelligence. If you're using Sage 50 Accounting, you have access to the Sage Intelligence module that enables you to run out and customize financial reports and dashboards to suit your unique business needs. What's more, you're also able to download them to Microsoft Excel and format them using the features you're already familiar with to create professional looking reports. Topics covered in this session: Accessing Sage 50cloud Intelligence, loading data and previewing reports, customizing reports (demo), Downloading to Excel (demo), and Working with add-ins (demo). **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	David Ako – Bryant, Sage	Intermediate
Protecting Customer's Sage 50 Accounting Data	With GDPR and CCPA already in place and more states announcing similar plans, it's clear that consumer privacy protection is here to stay. In this session, we'll share recommendations you can use to protect customer information and comply with government requirements. After participating in this session, you will be able to determine which data protection activities to start using in your business. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Nakia Christian, Sage	Introductory
Streamline your data entry and analysis using the power of Microsoft Excel	In this interactive session, we will work on a large, complex data set and create insightful Pivot Tables, build an eye-catching dashboard, and make use a few of our popular Excel Tips and Tricks to analyse and present the data to	David Ako – Bryant, Sage	Intermediate

	suit our needs. You'll also discover how to write and use a few of the most requested accounting formulae available in Excel to simplify your daily tasks all powered by Sage Intelligence. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.		
Customizing Sage 50 Accounting Financial Statements	Learning how to customize financial statements is the first step in getting the reports you need to run your business. Join this session to learn about the design tools you can use to modify and/or create your company's financial statements. After participating in this session, you will be able to: make simple modifications to a financial statement and describe the process to design a financial statement from scratch. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Letisha Campbell, Sage	Introductory
Collaborate from Anywhere with Sage 50 Accounting Sage Drive	Improve productivity by learning how to use Sage Drive to enable local area network (LAN) and remote employees to access your company data at the same time. After participating in this session, you will be able to: describe how to use Sage Drive and improve productivity by using the software more collaboratively. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Nakia Christian, Sage	Introductory
Sage 50 Accounting - the Road Ahead	Join us to learn about planned enhancements for upcoming releases. Participants will be invited to vote on new or enhanced features during this session. Don't miss this opportunity to voice your opinion. After participating in this session, you will be able to: describe planned enhancements and submit future enhancement requests. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Alistair Ellis, Sage	Introductory
Sage 50 Accounting Bank Statements, Feeds, and Reconciliation	Join us to learn how to use Sage 50 Accounting to simplify the account reconciliation process. We'll cover bank statements and how to establish a secure online connection with your bank to download transaction records to the Account Reconciliation window. After participating in this session, you will be able to: describe the steps to reconcile accounts and take next steps to utilize bank feeds. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Nakia Christian, Sage	Introductory

How to protect your company from Small Business Fraud	In this session, learn about fraud risks that are on the rise for small businesses. From external threats like business cyber threats, check fraud, and business identity theft to internal threats like theft, embezzlement, and kickbacks, this session will discuss multiple risks that could pose a real threat to the viability of your small business. After participating in this session, you will be able to take steps to protect your small business. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Andy Shank, Harland Clarke	Introductory

Product Innovation: Sage 100/100cloud These sessions will be focused on our Sage 100/100 cloud product and include content around product migration, new capabilities and tips and tricks.

Title	Abstract	Speaker	Level
The Road Ahead for Sage 100cloud	2019 was a big year for Sage 100cloud. We delivered out biggest release in several years with more than 30 new product enhancements. We completed our journey to framework with the launch of Sage Production Management and IRP. And we were recognized as a market leader by G2Crowd. In this presentation, you will learn about the ways that Sage is actively investing in Sage 100cloud, and how our roadmap is informed by a clear vision and strong commitment to serving our customers through continuous improvement and market-leading innovation. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Timothy Harfield, Sage Linda Cade, Sage	Introductory
Stories of Digital Transformation: How three businesses combined Sage 100cloud with high impact practices to drive measurable results	A business management solution is a tool, and as a tool it is only as effective as the organizations that wield it. In this session, you will hear three stories of digital transformation, told from the perspective of the innovators themselves A. **Leveraging ERP to Catalyze Digital Transformation for Business Growth** | Chris Long (President, Newberry Tanks) The evolution of Newberry Tanks since 2011 has involved a well thought out strategy to support manufacturing operations with accurate financials and efficient administration through business process streamlining, control, and automation. With ERP at the center of a journey of digital transformation, Newberry Tanks has achieved profit growth of more than 2x its competition. B. **Re-organization for efficiency and growth** | Gregory Billhardt (President, American Cutting Edge) American Cutting Edge recently reorganized its legal structure from three distinct companies to become a single legal entity. Using Sage 100cloud in close collaboration with their partner, American Cutting Edge was able to increase efficiency to drive an additional $100 a year and save more than 20 hours a month (a savings of more than $10k a year). C. **Redesigning G/L to support a new reporting structure** | Martha Kinzel (Controller, Trim-Tex)	Gregory Billhardt, President, American Cutting Edge Chris Long, President, Newberry Tanks Martha Kinzel, Trim-Tex	Introductory

	Trim-Tex adopted a new administrative reporting structure in 2017. Accommodating that new reporting structure required major changes to their General Ledger and a new way to report financial information. Working closely with their partner, Trim-Tex leveraged Sage Intelligence to gain control over where money is being spent, make managers accountable for their department(s), and easily identify when something has been miscoded or is outside of the norm. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**		
Upgrading your manufacturing experience with Sage Production Management	In March 2019 we released Sage Production Management as an on-framework replacement for the legacy Work Order module for Sage 100 and Sage 100cloud. In addition to being on framework and having feature parity with Work Order, Sage Production Management also includes more than 30 additional features and enhancements. Many Work Order customers still have questions about the differences between the two modules, and what it means to upgrade. In this session, we will cover the differences between Work Order and Sage Production Management, the migration process, and additional commonly asked questions that we have received since the release. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Darin Steward, VP Sage Manufacturing Sales, Scanco John Woodward, Sage	Introductory
Unlocking the true value of business intelligence with Sage Intelligence Reporting	Discover how easy and inexpensive it is to embrace business intelligence for your business using Sage Intelligence Reporting. Already available to you in your accounting or business management solution, Intelligence Reporting provides you with real value-adding reports that you can use to make faster, more informed business decisions. In this session, you'll get a taste of what these reports and dashboards are and how they can help your business. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Sandra Smith, Sage	Introductory
Sage 100cloud Integration with O365 PowerApps,	In this session we will demonstrate some of the things we are doing with Microsoft O365, PowerApps, PowerAutomate, and Teams. We will demonstrate a working App and then show basics	Kevin Acorace and Matt Higgins, Admix	Advanced

PowerAutomate, and Teams	steps on how to get started. To be successful, you should have basic concepts of setting up a gateway to your Sage Data from O365 and basic understanding of PowerApps, PowerAutomate, and Teams. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**		
Influence the Design for Sage 100cloud	Help the Sage 100 team design new features and enhancements to the product for future releases. Help us discover hidden functionality or workflows that we'd want to expand and prioritize features based on customer need and/or demand. This session is intended to be an interactive workshop where your voice can be heard by the Sage 100 design and engineering team. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Laura Dy, Diane Coffman and Elliott Pritchard, Sage	Intermediate
Make Sage 100cloud Your Own: An Introduction to Custom Office	Learn some of the basics around Customizer and Custom Office including the basics of scripting, creating UDFs and UDTs, and other simple customizations you can make to Sage 100cloud. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Elliott Pritchard, Sage	Introductory
Sage 100 Payroll Configuration and Optimization	Get a refresher course on setting up Payroll with deep dives into Tax Schedule configuration, various tips and tricks you can use to get your taxes calculating correctly and other utilities to make Payroll easier to use. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Elliott Pritchard and Diane Coffman, Sage	Introductory
Sage 100cloud REST webAPI - In-depth Overview	During this session you will learn the details about how you can provide secure access to your Sage 100cloud system via the new Sage 100cloud REST webAPI, opening up new possibilities for integrations with low-code/no-code tools such as the Power Platform, or native app and browser-based web development. The following will be covered: - Demonstration of some of the capabilities that are currently available in the webAPI. - Brief architecture overview and what you need to do to setup access to your system to allow access to the webAPI. - How to configure the Power Platform Connector for Sage 100cloud - .NET API Client for .NET development **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Steve Malmgren, Sage	Intermediate

Product Innovation: Sage 300/300cloud These sessions will be focused on our Sage 300/300 cloud product and include content around product migration, new capabilities and tips and tricks.

Title	Abstract	Speaker	Level
Take Care of Your Sage 300 Database	Congratulations! You've now taken on the responsibility for running Sage 300 at your organization. Let us share with you the experience of our Customers, Partners, Technical Support and Product Delivery teams on installation, maintenance and upkeep of Sage 300. We'll look at a wide range of topics from backup strategy, database maintenance, security, etc.; to keep your Sage 300 system humming along beautifully! **This session is not eligible for CPE credit.**	Richard Jang, Sage	Introductory
Develop Webscreens for Sage 300	There's no better time to get started developing Web screens for Sage 300. With updated code generation wizards, tutorials and examples let us show you what our Development Partners are creating as we move from the traditional desktop to a SaaS web product. This session is intended for our Partners and Sage 300 Developers. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	John Thomas, Sage	Intermediate
Manage Customer Relationships Better	Sage CRM is a great tool to help businesses track and manage key customers and accounts. Check out what's new in the redesigned integration. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Zainab Salihi, Baas Business Solutions	Introductory
Improve your Budgeting Process	Do you know how much your budgeting process is costing you? Cut your budgeting, forecasting, and planning efforts by as much as 50% with True Sky, a new ISV in the Sage 300 marketplace. **This session is not eligible for CPE credit.**	True Sky and Leanne Lowe, Sage	Intermediate
Take a Drive Through the Sage 300 Roadmap	"I didn't know Sage 300 had this feature or could do that" is something we hear from Partners/Customers. Join us to learn more about the many features added to Sage 300 in the last two years and take a sneak peek at what's coming next. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Alistair Ellis, Sage	Introductory
Get Tips and Tricks for Sage 300cloud	Learn the best tips and tricks on Sage 300cloud from certified experts. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	Leanne Lowe, Sage	Introductory
Get the Highest ROI on Your ISV Solutions	During this session, Joe will help customers define which ISV solutions have the highest utility and ROI. **This session is not eligible for CPE credit.**	Joe Santoro, SWK Tech	Advanced
Create Custom Reports in Sage 300	Generate custom reports and pull your data with ease using Sage 300. Sage 300 has customizable report capabilities offers your business a seamless way to integrate with top business reporting tools. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Leanne Lowe, Sage & Richard Jang, Sage	Advanced

| Track that Sale | Follow a sale throughout its lifecycle in Sage 300. Automate key tasks and learn how our new Credit Hound ISV can help you improve revenue. **This session is not eligible for CPE credit.** | Credit Hound and Leanne Lowe, Sage | Intermediate |

Learn about the rest of our small-to-medium segment product portfolio in these 60-minute educational sessions. Products that may be covered include but, are not limited to: Sage HRMS, Sage Fixed Assets, Sage CRM, Sage 500, Sage Timeslips and more

Title	Abstract	Speaker	Level
Key HR Drivers in 2020 and How HRMS Technology is Shaping Them	Human Resources is faced with many challenges in 2020. This session is designed to provide business owners, executives, and HR professionals with guidance on important HR drivers and how to leverage Sage HRMS to better enable people for organizational success. This presentation will provide insight on drivers, measurements on key drivers to predict future success, and offer a case study on how simple HR data and metrics moved to business insight and actionable measures within Google. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Harold Ford, Net@Work	Introductory
Sage 500 Tips and Tricks	Learn the best tips and tricks on Sage 500 from certified experts.	Linda Cade, Sage	Intermediate
What's New in Sage Fixed Assets Release 2020.1 and Product Roadmap	Roll up your sleeves and get ready to learn how to generate tax saving for your company with the latest depreciation laws in Sage Fixed Assets 2020.1. Learn about Section 179 expense deduction changes and the tax extenders from the Further Consolidated Appropriations Act, 2020. Learn about Feature updates in the 2020.1 release such as Sage Intacct integration, Batch Report options and customizing book titles. Plus, you'll be able to peek at the upcoming Sage Fixed Assets Product Roadmap. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Wayne Austin and James Reese, Sage	Intermediate
Sage Fixed Assets Overview and ERP Integration	Did you know Sage Fixed Assets integrates with most ERPs such as Sage Intacct, Sage 100/300/500, Sage 300CRE plus non-Sage ERPs such as Microsoft Dynamics SL, Oracle and SAP (with customization)? Attend this session to learn about the value Sage Fixes Assets provides your organization, discover how Sage Fixed Assets helps you manage your Fixed Assets through their full lifecycle, and learn how Sage Fixed Assets integrates with ERP systems. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Wayne Austin, Steven Cohen and John Hester, Sage	Intermediate
Navigating the Sage HRMS Roadmap	In this session your tour guide and Product Manager for Sage HRMS, Joyce Tharp, will cast vision for the coming enhancements to the product. The roadmap is just words on a page until you experience it in this presentation. You will have a chance to first-hand hear and understand what is in the future of Sage HRMS. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Joyce Tharp, Sage	Introductory
Comprehensive Reporting in Sage Fixed Assets —Depreciation	Learn how to take advantage of the reporting capabilities in Sage Fixed Assets Depreciation. Topics covered will include: - Our most popular standard reports for monthly reporting purposes - Easy customization of standard reports to fit your needs	Ann Donie, Sage	Intermediate

	- Send multiple reports in batches to PDF or Excel formats with the push of a button		
	- Save time running reports when managing fixed assets for many companies		
	This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.		
	Visit the Sage Summit Lab Center for a hands-on experience of this session.		
Is your inventory forecasting maturity hurting your business?	This fast-paced session will establish the importance of forecasting inventory demand; discuss the stages of forecasting in the maturity curve; and help attendees identify where they are in the curve and how to move to the next level. Finally, we will describe how Sage Inventory Advisor can be a tool in this process of maturation. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Craig de Kock, Netstock	Introductory
Not just for marketing and sales: How adding Sage CRM to Sage 100 can help improve efficiency and inform financial strategy	Having a Customer Relationship Management strategy matters for every business. We know that CRM can support business growth by accelerating sales velocity. But CRM is about far more than marketing and sales. This session will cover how to get started thinking about how a CRM can increase data quality across the entire organization, inform financial planning and strategy, and amplify the power of your company's information through blending financial and other information. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.** Visit the Sage Summit Lab Center for a hands-on experience of this session.	David Beard, Sage	Introductory
How to Identify Your Organization's Most Critical Business Processes`	Everyone speaks to you about "automating business processes", but for many organizations that's like buying a car before you've decided where you want to go; a vehicle is valuable only once you've identified your destinations. The same is true for business process automation software -- such technology has value only once you've decided how you want it to drive your business. This is where the process of identifying your organization's most "automatable" business processes is essential. Although various technologies often come with predefined business process automation scenarios, the truth is that you want your business to drive your business process automation -- and not vice versa. This presentation will walk you through an easy and straightforward way to identify your organization's most needed ERP business processes, including an explanation of the 8 most common types of business conditions that can benefit from automation. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Don Farber, Sage Alerts & Workflow	Introductory
What's Next for Sales Tax Compliance?	Over 40 states have revised their sales tax laws since the United States Supreme Court ruled in favor of the state in South Dakota v. Wayfair, Inc. How have these changes affected remote selling? What can we expect in 2020 and beyond? Join us to get	Lizzy Guido, Avalara	Intermediate

	your tax compliance questions answered by our panel of experts. **This session is not eligible for CPE credit.**		
Taking Sage HRMS to the Next Level – Advanced Usage	Customers are doing amazing things in Sage HRMS. From advanced benefits statements to seamless integrations to powerful data analysis, customers are harnessing the power of their HR technology to engage their people and make better business decisions. Net at Work leads a panel of four customers in various industries who have leveraged the power of their Sage HRMS technology to further their organization and drive business success. **This session is not eligible for CPE credit.**	Harold Ford, Net@Work	Intermediate
Sage CRM: Key to successful CRM deployment	Your business partner can help deliver even more systems capability by adding Sage CRM to your accounting product. Come to this session to hear the experience of specialist CRM partners as they talk about key learnings, success factors; more when it comes to deploying Sage CRM. Understand the opportunity that you, as a customer, must work with business partners to add CRM or, as a partner, how to build CRM competencies into your own practice. **This session is not eligible for CPE credit.**	David Beard, Sage	Introductory
Press the Easy Button: Simplify your life with a complete fixed asset lifecycle solution	Make your life easier with an end-to-end solution for implementing Sage Fixed Assets. Learn how a complete asset management solution can jump-start your fixed asset system - including data conversion and integration, physical inventories, barcoding scanners and labels, cost reconciliation and asset appraisals, and software customization and training. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Scott Swarts, Paragon	Intermediate

Hands-on-Learning Track

On Wednesday, December 9 and Thursday, December 10 we are offering our customers multiple hands-on virtual labs to allow you to test-drive Sage software in specific, high-value customer uses. Our self-guided labs are designed to let you try the specific Sage software uses you saw demonstrated in Summit breakout sessions.

Come to the Sage Summit Lab Center to gain access to any of our self-guided, virtual labs that you want to try. Virtual labs can be used anywhere, anytime until **December 18th**. Take the virtual labs back to your team to share the features you learned about at Summit.

Join Sage experts in the Lab Center during your scheduled time to hear tips and to ask your questions about our product labs.

You are required to bring your own HTML5 compliant device to participate in our hands-on-learning labs. A laptop is highly recommended.

Want to learn more? Everyone completing a hands-on lab will receive a 15% discount, unlimited use coupon good for any Sage University course through **May 2021.** That's 15% of all you can learn! (Restrictions apply)

These sessions are not eligible for CPE credit.

Title	Abstract
Sage 100 Labs	The Road Ahead for Sage 100cloud – Hands-On Lab
	Unlocking the true value of business intelligence with Sage Intelligence Reporting – Hands-On Lab
	Upgrading your manufacturing experience with Sage Production Management – Hands-On Lab
Sage 300 ERP Lab	Tips and Tricks for Sage 300cloud – Hands-On Lab
Sage 50 Labs	Collaborate from Anywhere with Sage 50 Drive – Hands-On Lab
	Customizing Sage 50 Accounting Financial Statements – Hands-On Lab
	Discover Top 10 New Features in Sage 50 Accounting – Hands-On Lab
	Protecting Sage 50 Accounting Customer Data – Hands-On Lab
	Streamline your data entry and analysis using the power of Microsoft Excel – Hands-On Lab
	Unlock the true potential of your business data with Sage 50 Intelligence – Hands-On Lab
Sage CRM Lab	Not just for marketing and sales: How adding Sage CRM to Sage 100 can help improve efficiency and inform financial strategy – Hands-On Lab
Sage Fixed Assets Lab	Comprehensive Reporting in Sage Fixed Asset—Depreciation – Hands-On Lab

Executive-to-Executive Track

This **invite-only** leadership track available on Thursday, December 10 is geared to help senior business leaders address their company's challenges, learn strategic changes within the market and discover industry trends. This track does not focus on products or segments – just thought leadership. If interested in attending our E2E sessions, please email sara.straw@sage.com and we will advise on if they are a right fit.

These sessions are not eligible for CPE credit.

Title	Abstract	Speaker	Level
Welcome	Welcome from Sage North America EVP & Managing Director, Nancy Harris	Nancy Harris, Sage	Intermediate
Transformational Insights from Sage Research	How are CFOs readying for the next level of transformation? What are our customers biggest challenges? Sage has been gathering the answers to these questions and more over the last few months. In this session, Nancy Harris shares the transformational highlights from a series of recently completed research projects. How do these insights resonate? Attendees will discuss in small groups and present back to the broader E2E attendees.	Nancy Harris, Sage	Intermediate
Lunchtime Product News	Learn the latest product news from Sage's Director of Product Management, Mike Ritchie	Mike Ritchie, Sage	Intermediate
Linking Talent to Value	While at first glance the CFOs role to manage expenses may be seen in direct conflict with spending on objectives and activities of HR, most CFOs know that increases in top line, bottom line and shareholder value can't be achieved without a workforce operating at full productivity, engaging its customer base and executing enterprise growth strategies. As the war for talent persists and the challenges with attracting and retaining key talent become increasingly complex, CFOs are fundamentally rethinking the composition of their workforces and are creating cultures that are inclusive, engaged, high-performance, customer-focused, and resilient. We'll explore how CFOs can best lead an enterprise that retains top talent while maximizing top line, bottom line and shareholder value performance.	Mike Ross, Insperity	Intermediate
Customer Panel	Leveraging the nominations from the customer awards program, we would bring in up to 3 customers who would talk about the challenge they solved in their business and how they approached it.		Intermediate
Healing Leadership	This session is dedicated to the possibility that most of the leadership thinking is wrong as it is ultimate based on manipulation - trying to get someone to do something. Coming to terms with this idea is difficult and not for everyone because it requires us to examine some of our most deeply held beliefs and either dismiss them or at least think differently about them. If you are interested in having a conversation about healing leadership, you are invited to attend this session facilitated by Ed Kless, Sage senior director of partner development and strategy. This material is based on the work of Howard Hansen and Steve Geske, who have presented at previous Sage Summits.	Ed Kless, Sage	Advanced

Sponsor Showcase Track

These sessions on Thursday, December 10 are presented by our Sage Summit US sponsors to provide additional information about partner offerings available to compliment your existing Sage solution(s)**. These sessions are not eligible for CPE credit.**

Title	Abstract	Speaker	Level
Utilizing Mobile Technologies in the Warehouse to Stay Ahead of Your Competitors.	Be the leader in your industry by introducing or expanding warehouse automation in your distribution facilities. Learn what you can do today to be the leader tomorrow.	Phillip Hall, Scanco	Introductory
Manufacturing in 2020 – Streamline your data collection and increase output	Manufacturing is a constantly changing industry. See how technology is being utilized across all facets of the shop floor to increase your efficiency, increase capacity, decrease labor costs, and allow for more accurate traceability	Darin Steward, Scanco	Introductory
3 Ways to Go Touchless in AP & Beyond	Stop the stranglehold your documents have on you – everyone in your organization CAN access needed documents in a few clicks. Enhance your Sage deployment by going paperless and touchless in any department: 1. Eliminate paper-based document processes 2. Capture, process, retrieve & deliver documents automatically 3. Streamline previously manual processes, Stop the stranglehold your documents have on you – everyone in your organization CAN access needed documents in a few clicks. Enhance your Sage deployment by going paperless and touchless in any department: 1. Eliminate paper-based document processes 2. Capture, process, retrieve & deliver documents automatically 3. Streamline previously manual processes	Altec	Introductory
Do you want to build relationships with Sales Directors across your base? There's an app for that!	In this session, learn 1) why Finance and Sales teams are often at odds 2) how an app can help them get along by bridging the gap between ERP and CRM systems 3) how Skynamo can unlock new revenue streams for your business and increase customer retention.	Brian Howe, Skynamo	Introductory
Electronic Payroll Tax Reporting & Payments	Join us for a live Demo and Q&A about eFiling Payroll Tax Reports & Payments. Aatrix provides eFiling of W2s, 1099s, ACA, Unemployment, New Hire, Wage Withholding Reports & Payments. Learn how to use the Payroll Tax Forms & Payments that guarantee compliance and are recommended by 96% of customers.	Jessica Bohn, Aatrix Softward	Introductory
Paya's Integrated Payments Solution Drives B2B Optimization for Sage ERP	For nearly two decades, electronic payments have been the hallmark of B2C transactions, however, card-based payments and ACH are on the rise for the B2B ecosystem. Learn how Paya – the only Sage-certified payments provider – delivers robust, frictionless integrated payments to support B2B transactions to help our partners accelerate growth.	Joe Rodriguez, Paya	Introductory

Automate AP - PETA did it and it was a game changer!	Learn how PETA (People for the Ethical Treatment of Animals) leveraged Sage AP Automation to replace manual, time-consuming accounts payable processes. As a large non-profit with numerous legal entities and hundreds of users that need access to accounts payable (AP) functions, PETA needed more centralized control of AP documents and approvals. PETA will talk about their difficulties prior to AP Automation and how Sage AP Automation helped alleviate these issues, making their back-office more efficient so they can focus on their mission to protect animals.	Catherine Dahl, Beanworks	Introductory
Unlock the power of your data with Sage Enterprise Intelligence	Attend this session to learn how Sage Enterprise Intelligence (SEI) can transform your complex, fragmented data into meaningful information to reduce time-to-decision and improve the coordination of operations across your organization. With SEI you can: • Integrate Sage Enterprise Intelligence with your Sage ERP solution to: • Reduce complexity, costs and time spent on business analysis and reporting. • Make faster, better-informed decisions by analyzing real-time information • Empower users to analyze and report on information in a self-service manner. • Access data on the go, when and where you need it. • Have one solution for complete data management and analytics. • Improve enterprise wide reporting from day 1 with SEI's pre-built templates and Universal Data Models	Olivia Brown and Jasdeep Bhogal, Tangerine	Introductory

Sage Timeslips Partner's Only Track

These sessions on Thursday, December 10 are exclusive to our Sage Timeslips Partners.

Please review session descriptions to learn if the session is CPE eligible.

Title	Abstract	Speaker
Sage Timeslips Undo Multiple Bills: No More Wasted Time	Learn how the New, Undo Multiple Bills functionality can save you and your clients time and the daunting task of correcting previously approved bills. Gain insights into its workflow, functional benefits and database impact. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Sam Scola and Corey Marques, Sage
Premium Reporting Workshop	Join our Sage Timeslips Premium Reporting workshop to gain in-depth knowledge and real-world application and benefits of the expanded reporting functionality, including two new report types. **This session is not eligible for CPE credit.**	Sam Scola and Tom Hinds, Sage
Sage Timeslips TAL Pro: Integrate your Billing and your Accounting	Are you clients double entering data in Timeslips and Sage 50 or QuickBooks? Double entry takes time and leads to errors. We will show you how you can connect Timeslips to your accounting software and help your clients improve efficiency and accuracy. **This session is not eligible for CPE credit.**	Caren Schwartz, Time and Cents and Claire Barnes, Integrated Visions
Sage Timeslips Roundtable: Ask the Experts	Got questions? We've got answers! Join our Sage Timeslips Premium Roundtable of Experts. Open forum discussion provides attendees the opportunity to pose questions, share business best practices and submit product suggestions. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Sam Scola, Sage

Sage Certifications

These sessions on Friday, December 11 are presented by our Sage Learning Services team. Certification exam experts will introduce you to the tangible value of a Sage Certification for your organization and how you can earn that coveted professional recognition.

For those currently working toward their Sage Certification, any of the five deep-dive test preparation sessions will help prepare you to successfully pass a Certification test. **All certification sessions are CPE eligible.**

Join us and take your Sage Customer Certification examination for free.

All participants in the Friday, December 11 Sage Certification sessions will receive a voucher good for one free certification test.

You are required to bring your own device (BYOD) to participate in our certification test prep.

Title	Abstract	Speaker
How Sage training and certification can boost your business	Learn the tangible value of earning a Sage certification for your organization and the steps you can take to land yours! You will discover: The available line-up of certifications. What it takes to earn your Sage certification. How to get started. The recommended training to prepare you for an exam. How to access Sage University and locate the large library of training resources to boost your results using Sage software. We'll give you a push-start toward recognizing your Sage competence and expertise. **This session is eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Cari Lawton-Flores, Sage
Get ready to pass your Sage Fixed Assets Certification Exam	Are you just starting on your way to certification? Are you almost ready to take that certification exam? No matter where you are on the road to earning your Sage certification, you'll be better prepared after attending this session.	Ann Thornsen, Sage
Get ready to pass your Sage 50 Certification Exams	Session leaders will share keys to passing your test. They'll detail the distribution of questions by topic and by type to help you focus your studying. You will learn which questions tend to be the most difficult and gain insights into how to manage your test taking experience. You'll benefit from group Q&A plus individual coaching from our expert instructors.	Nakia Christian and Letisha Campbell, Sage
Get ready to pass your Sage 100 Certification Exam		Sue Moore, Sage
Get ready to pass your Sage 300 Certification Exam	Bring your questions and take away confidence on your road to earning your Sage certification. **Each of these sessions are eligible for one (1) Specialized Knowledge & Application - Group-Live CPE credit.**	Fanny Laguna, Sage