

SOUC 2018

Course & Instructor Schedule

Tracks A - C

	Track A	Track B	Track C
Monday	SedonaOffice 101	SedonaOffice Operations	General Ledger: A-Z
1:30 PM - 2:40 PM	AR Setup	Inventory: Part 1	Accounting 101
	Lisa & Kaitlyn	Wayne, Mellissa & Matt	Bob & Debbie
3:00 PM - 4:15 PM	Accounts Receivable	Inventory: Part 2	General Ledger Setup
	Lisa & Kaitlyn	Wayne, Mellissa & Matt	Bob & Debbie

	Track A	Track B	Track C
Tuesday	SedonaOffice 101	SedonaOffice Operations	General Ledger: A-Z
9:15 AM - 10:30 AM	All about the Customer	Jobs: Setup	Deferred Revenue
	Lisa & Kaitlyn	Carolyn & Laurie	Bob & Debbie
10:50 AM - 12:00 PM	RMR Management	Job Case Studies: Part 1	Month End Closing
	Lisa & Kaitlyn	Carolyn & Laurie	Bob & Debbie
1:30 PM - 2:40 PM	Service Setup	Job Case Studies: Part 2	Financial Reporting
	Lisa & Kaitlyn	Carolyn & Mellissa	Bob & Debbie
3:00 PM - 4:15 PM	Service Management	Job Case Studies: Part 3	Vivid CPM 1: Overview
	Lisa & Kaitlyn	Carolyn & Mellissa	Bob, Jim Lee & James Briscoe

	Track A	Track B	Track C
Wednesday	SedonaOffice 101	SedonaOffice Operations	General Ledger: A-Z
9:15 AM - 10:30 AM	AP Setup	Service: Part 1	Vivid CPM 2: Setup, Budget & Automation
	Lisa & Kaitlyn	Wayne & Carolyn	Bob, Jim Lee & James Briscoe
10:50 AM - 12:00 PM	Accounts Payable	Service: Part 2	Flex Reporting
	Lisa & Kaitlyn	Wayne & Carolyn	Jim Lee

SOUC 2018

Course & Instructor Schedule

Tracks D - F

Monday	Track D	Track E	Track F
	Executive Education	Advanced Users	New Modules & Features
1:30 PM - 2:40 PM	State of the Industry	Sales Automation	SedonaEmail
	Jeff Gruender	Michael & Justin	Jim & Carolyn
3:00 PM - 4:15 PM	RMR Attrition	eForms	SedonaOffice Advanced EFT Processor
	John Brady	Michael & Justin	Jim & Carolyn

Tuesday	Track D	Track E	Track F
	Executive Education	Advanced Users	New Modules & Features
9:15 AM - 10:30 AM	Marketing Ideas for Great Results	SedonaFSU	SedonaDashboard 2.0
	Boaz	Wayne & Justin	Matt & Jim
10:50 AM - 12:00 PM	Employee Engagement	SedonaSync 101	Time & Attendance
	Boaz	OPT Business Services	Michael & Justin
1:30 PM - 2:40 PM	Rules for Powerful Meetings	OPT Web Services	Query Builders
	Boaz	OPT Business Services	Matt, Jim & Wayne
3:00 PM - 4:15 PM	Setting & Achieving Goals	OPT Sync Events	Manitou Integration
	Boaz	OPT Business Services	Matt & Bold Technologies

Wednesday	Track D	Track E	Track F
	Executive Education	Advanced Users	New Modules & Features
9:15 AM - 10:30 AM	DIY Panel Discussion	Data Analysis & Reporting Using Excel	Tips & Tricks
	Michael & Guests	Matt & Jim	Don & Mellissa
10:50 AM - 12:00 PM	Marketing (In-House!) for Security Companies	SedonaAPI	Best Practices Q&A
	Sam	Travis	Don & Mellissa

SOUC 2018: Guest Track

WeSuite Sales

Join our Friends at WeSuite - Offering Sessions Monday - Wednesday!

The WeSuite 2018 Sales Track focus is on alignment of the sales process in WeSuite. Sessions will provide specific learning points and take-home strategies to help boost individual and company sales performance. Collaborate with fellow Users and WeSuite sales experts to get the most from your WeSuite sales system. Deep dives will be featured in WeOpportunity, the WeSuite GO! app, WeEstimate, and its powerful Modules.

Sessions are designed to help you take advantage of features and workflows, as your business launches in WeSuite and grows and changes with time. Check out the new web-based SiteSurvey for WeEstimate! It's slick, easy to use and automates the estimating process while providing visual reference for Operations and Customers. The WeSuite Innovation Zone is back by popular demand, providing interactive learning for all WeSuite products and User levels. Learn, earn swag and have fun with fellow Users! The WeSuite Sales Track closes with Tech Talks, highlighting product direction, the latest technologies WeSuite is using to create WeSuite Cloud and how these will affect your business. Executives, Sales Leaders and Sales People are all invited to participate in this high-energy, hard-hitting track!

****See Page 17 of the Course Catalogue or**

Click [HERE](#) to download WeSuite class descriptions & instructors!**

Monday	
1:30 PM - 2:40 PM	
3:00 PM - 4:15 PM	

Guest Track	
WeSuite Sales	
Manage Pre-Sales & Turn Pipeline into Revenue	Samantha Perry & Tracy Larson
Reinventing System ROI	Arturo Bravo & Michael Fazio

Tuesday	
9:15 AM - 10:30 AM	
10:50 AM - 12:00 PM	
1:30 PM - 2:40 PM	
3:00 PM - 4:15 PM	

Guest Track	
WeSuite Sales	
Beyond WeEstimate Core	Samantha Perry & Arturo Bravo
NEW! Web-based Site Survey Powered by WeEstimate	Tracy Larson & Arturo Bravo
Innovation Zone	Interactive Session
Innovation Zone	Interactive Session

Wednesday	
9:15 AM - 10:30 AM	
10:50 AM - 12:00 PM	

Guest Track	
WeSuite Sales	
Tech Talks 1 & 2	Various Speakers
Tech Talks 3 & 4	Various Speakers