

Accounting and Financial

Getting started with ACH

Intermediate

Presented by Susan Steed, Gustave A Larson Co

How to get your system and vendors ready for ACH payments.

Sales Tax Basics

Presented by Michael Rea

The 2018 South Dakota vs Wayfair decision has made life considerably more difficult for businesses everywhere. Today most all jurisdictions that you ship to want to make sure that they are getting their share of tax revenue. These taxing entities do not care if you are shipping to a consumer or a business. With the taxing entities having the ability to padlock your doors, you need to assure that your business has its records up to date and is taxing the sales that need to be taxed.

In this session we will:

1. Go over some of the basics of setting up taxing in P21.
2. Talk about some tips and strategies to help keep the records up to date and to help you know if a sale should be taxed or not.
3. Discuss Avalara and how it can help with more complex and multi-jurisdiction tax situations.

Customer Account Set Up

Beginner

Presented by Jenny Sagan, Koehler Rubber & Supply

In this class we will discuss and go over the fields when setting up a new Customer. Things you should think about outside of P21 as well.

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



Real Time General Ledger - What Does This Mean?

Intermediate

Presented by Carolyn Hunt, Hunt Consulting Services

Prophet 21 provides real time general ledger postings, but what exactly does this mean?

This session will cover how transactions within Prophet 21 affect the general ledger and how to handle exceptions. We'll review the accounting "T"s that make up each transaction so you have a complete understanding of how the balance sheet and profit/loss statements are affected by the entries. We will also review proper processes for reversing transactions to make sure your GL stays in balance and that associated gains or losses, if any, are reflected properly on your financial statements.

Managing Cash Flow Beyond P21

Intermediate

Presented by Rob Germundson, Industrial Pipe & Valve

Cash flow management is essential to business. P21 provides rock-solid cash tools to produce information for day-to-day operations. This class will cover tools in the Orders module, AP module, AR module, and Financial Statements. However, a business problem is forecasting cash over longer-term time periods. This may be necessary to evaluate new investments, line of credit requirements, or create business objectives.

To solve this, users can utilize financial tools to forecast cash flow using EXCEL. During class, we'll look at a high-level model to create cash flow projections. The model has forecasted sales, gross profits, expenses, and capital expenditures. Next, cash flows can be determined from forecasted data by applying financial tools such as Days Sales Outstanding, inventory turnover, note payments, tax payments, CAPEX expenditures, etc.

Using these techniques, users can create estimated cash flows and have quantitative information to better manage cash flow outcomes!

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



Landed Cost

Intermediate

Presented by Stacy Cline, Cline Financial Services, LLC

Many companies want to use landed cost, but how do we deal with configuring it in P21, ensuring we understand the impact of using landed cost, and the accounting behind it. Session will cover configuration, impact of variances, impact to inventory, and reconciliation of accounts.

Month End/Year End Tips

Intermediate

Presented by Stacy Cline, Cline Financial Services, LLC

This session will focus on developing efficiencies to reduce the month end/year end close cycle while improving the quality of data. Geared towards bookkeepers, accountants, financial analysts and controllers. The focus will be on establishing a month end closing checklist, repetitive journal entry templates, account reconciliations and exporting relevant financial data out of P21. Once implemented, companies will see improvement in financial integrity of data and be able to more effectively manage, identify and optimize financial decisions.

Advanced Accounting

Advanced

Presented by Stacy Cline, Cline Financial Services, LLC

Have you ever wondered what happens when you complete a system transaction? This session will take a deeper look into the accounting behind more complex accounting such as containers and vessels, special inventory, WIP, etc. If you have a specific process request please send to me directly at stacy@clinefinancialservices.com.

A Day in the Life

Beginner

Presented by Stacy Cline, Cline Financial Services, LLC

Let's be honest, daily accounting tasks can become redundant. There is a very clear monthly pattern of data entry, cash receipts, check cutting, close, reporting and other

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



projects mixed in. How do we make this cycle more efficient and effective? What other items can we stretch ourselves into that not only improve the efficiency of our day to day activity, but also make marked improvements to the business? This session will cover how to approach this cycle differently and mix it up a bit!

Creating Financial Statements

Beginner

Presented by Stacy Cline, Cline Financial Services, LLC

Session will focus on creating and maintaining Financial Statements in Prophet 21. Prophet 21 provides the ability to create and manage financial statements custom to your company. Learn how to map the chart of accounts, create rollup groups, manage time periods and financial statement templates, including the often overlooked Statement of Cash Flow! Once implemented, companies can drive and produce financial statements in a few simple steps!

Calculating Commissions

Intermediate

Presented by Christina Kamm, Applied Industrial FP/FCX

Will cover the basics of commission calculations, as well as split commissions set up.

How To Use Flat Percentage Rate Landed Costs

Intermediate

Presented by Christina Kamm, Applied Industrial FP/FCX

This session will demonstrate how to create a landed cost at a flat rate percentage and then how to zero out the clearing account at month end.

End of Day Processes

Beginner

Presented by Stacy Cline, Cline Financial Services, LLC

Congratulations! You've made it to the end of another work day! BUT, before you head home there are a few items that need to be addressed...

This session will cover daily/monthly tasks across all areas of the system to ensure business commitments are met, data maintains integrity and accuracy, and enable the business to make timely, accurate decisions.

Business and General Functionality

Lot Billing

Intermediate

Presented by Shiv Manchanda, Guillevin International Co.

Lot bills are collections of items that are sold together. P21 allows different items to be grouped together to be billed as a whole, rather than on a per item basis. In this session, we will talk about when and how to use lot bills. We will follow the process from creating a lot bill sales order to creating a purchase order to invoicing the customer and paying the vendor. This session assumes that you are familiar with and can carry out basic operational tasks in P21.

Customer Service - Leveraging P21 to Meet Customer Requirements

Intermediate

Presented by Candice Powell, Regency Lighting

This class will explore ways to leverage P21 functionality to provide front-line team members the right tools to serve customers better. We'll discuss how business rules can create a workflow, which reduces errors and streamlines business processes. We'll also discuss how portals can be leveraged to provide team members with key information to manage customer accounts.

Improve Inventory accuracy with cycle counts

Beginner

Presented by Shiv Manchanda, Guillevin International Co

There are various books and articles on the benefits of cycle counting. It is an efficient and effective way to ensure continuous inventory accuracy. In this session, we will talk about the cycle count process in P21 and how to get started with cycle counting. We will follow the process from setting up a cycle count criteria to printing your first cycle count to updating inventory values in P21 and everything in between.

Getting Started with Production Orders & Assemblies

Advanced

Presented by Jason Bail, Building Controls and Solutions

How to get started with P21 Production Order Processing. Everything you need to know from system setup to creating and processing your first production order with helpful tips in the assembly setup along the way.

What's Sucking the Life Out of You?

Beginner

Presented by Sandra Sadley, Epicor

Events, friendships, relationships, experiences, or expectations can simply suck the life out of you if you let it and you may find yourself frustrated, exhausted, and generally unhappy.

Join this session to identify those events, laugh a little, and get a tip or two about how to deal with the things that suck the life out of you.

What Makes "Cultural" Excellence a Reality?

Intermediate

Presented by Lisa Nausley, Sandler in Chattanooga

Uncover the overall health of your organizational culture.
Understand the financial impact of moving your culture to the "next level".

What challenges do we need to address to have the culture we desire?
What is the Culture we Desire?

5 Steps to Thriving in Any Economy

Beginner

Presented by Lisa Nausley, Sandler in Chattanooga

Worried about fluctuations in the economy?
Where should you focus?
How should we be thinking?
What are 5 steps to Thriving in Any Economic Situation?

10 Step Organizational Change Strategy

Intermediate

Presented by Lisa Nausley, Sandler in Chattanooga

Change is Inevitable...Deal with it!
How to work with different styles to navigate change.
Learn a 10 Step Change Strategy

Don't Talk to Strangers & Don't Talk About Money!

Beginner

Presented by Lisa Nausley, Sandler in Chattanooga

We were raised with these messages, but as a leader or in a sales position we have to do both of those things.

How do we over-ride those internal messages and have productive discussions with employees and customers?

Learn how to get comfortable having uncomfortable conversations.

Embrace new beliefs and exude confidence when faced with tough situations.

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



Vendor Rebates and Sales Price Pages

Intermediate

Presented by Diane Arena, Spec-Tech Industrial Electric

This session will cover the basics of setting up P21 to properly track vendor rebates using sales price pages.

- Steps to set up price page for vendor rebates
- The process to tie vendor rebate debit memo to open P21 rebate items
- Overview of how it hits GL and adjusts sales history data
- Common issues and things to look out for - where P21 fails
- Customizations and processes outside of P21 to make things easier

Keeping Your Transactions Current

Intermediate

Presented by Carolyn Hunt, Hunt Consulting Services

Whether you are new to the Prophet 21 system or have been using it for years, transactions can get overlooked. Shipments don't get shipped or confirmed, purchase orders remain open for products you will never receive, customer returns are open for years and years. This session will review best practices for keeping your transactions current and how to correct the ones that should have been completed days, months, or years ago. The more accurate your transactions, the more accurate your inventory counts, open orders, open POs, open transfers, etc. Use the tools provided by Prophet 21 and the expertise of your employees to make sure you are not creating additional expense to your company by leaving transactions open and unfulfilled.

Handling Exception Transactions in Prophet 21

Intermediate

Presented by Carolyn Hunt, Hunt Consulting Services

We definitely do not live in a perfect world. Handling exceptions that occur quite regularly in our business can become time consuming and result in inaccuracies within our financial reporting if we do not take care of them properly. This session will review best practices in handling customer ordering and/or shipping errors, receiving errors, direct ship

confirmation errors, and more. Let Prophet 21 help you manage these exceptions so you have complete traceability and know you have handled both the external customer's needs as well as the needs within your company to maintain accurate inventory, accounts receivables, and accounts payable.

Cybersecurity

Intermediate

Presented by Cody Durden, Megamind Security

In cybersecurity our mission is to allow the business to operate securely in a hostile environment. This is our mission and each step, tool, process we implement to achieve this needs to fit in with that overarching mission. How we do this is dependent on a lot of internal and external factors within your organization. But starting with the basics and then expanding to fit is always a good way to go.

Below is a non-exhaustive list of some topics we will cover.

- Patching
- Know your attack surface
- Email
- How to secure Web
- How to secure VPN
- How to secure MFA
- Backups
- Principle of least privilege
- CIS Guidelines
- Benchmarks
- NIST Framework
- CSF (Cybersecurity Framework) 1.1
- CSF (Cybersecurity Framework) 2.0

Bringing Value to Meetings with Buyers

Intermediate

Presented by Norm Clark, Texas A&M University

Considering new technologies and a new generation workforce it seems that people are not as willing to talk to sales people as they once were. When a potential buyer does accept

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



a meeting they expect the salesperson to bring something of value. This section addresses how to engage potential buyers in meaningful conversations to better understand their businesses and the challenges that we may be able to provide solutions to. We do this through Effective Questioning and Listening Techniques.

During the session we will explore:

- How to structure questions
- Different categories of questions and when to ask each
- Effective listening techniques
- How to find problems we can provide solutions to

We will also develop a Customer Needs Analysis that help us to use these techniques effectively.

Who should attend:

- Inside and outside salespeople
- Sales Managers
- Branch Managers
- Anyone who works directly with salespeople

Developing an Employee Value Proposition (EVP) Intermediate Presented by Norm Clark, Texas A&M University

An emerging concern of industrial distribution leadership today is attracting, developing and retaining the next generation of talent. Texas A&M University conducted a two-year fieldwork study that involved companies from a variety of industrial marketing channels. This study produced a diverse set of best practices that focus on these talent development concerns. This session is designed to help participants understand a process for developing an attractive Employee Value Proposition (EVP).

During this session we will explore:

- How to answer the question “Why should I work for you?”
- What employees want:
 - o Tangible rewards
 - o Intangible rewards

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



- How to make your EPV authentic and unique
- How to differentiate your company from your competitors

Who should attend:

- HR Managers
- HR Generalists
- Recruiters
- Hiring Managers
- Anyone concerned with Developing a Talent Pipeline

Strategies for Successful Internships

Intermediate

Presented by Norm Clark, Texas A&M University

An emerging concern of industrial distribution leadership today is attracting, developing and retaining the next generation of talent. Texas A&M University conducted a two-year fieldwork study that involved companies from a variety of industrial marketing channels. This study produced a diverse set of best practices that focus on these talent development concerns. This session is designed to help participants understand a process for Developing Strategies for Successful Internships.

During this session we will explore:

- The value of internships
- Where to look for interns
- An Employee Value Proposition (EPV) that will attract interns
- Structured and challenging internships
- Developing meaningful project for interns
- Converting interns to full time employees

Who should attend:

- HR Managers
- HR Generalists
- Recruiters
- Hiring Managers
- Anyone concerned with Developing a Talent Pipeline

Self-Hosting P21 in the Cloud

Intermediate

Presented by Cody Durden, Megamind Security

In this intermediate level class we will be discussing the groundwork for setting up a best-in-class cloud environment. Utilizing the resources in any of the big 3 cloud providers you can create a resilient, agile, and security centric environment at a modest price.

Whether you use Azure, AWS (Amazon Web Services), or GCP (Google Cloud Computing) we can setup your organization up for success in the cloud.

Some of the items we will be discussing are:

- Encryption Services
- Networking
- Firewalls
- Security Groups
- Logs
- Inspecting traffic
- Alerts
- How to centralize P21
- How to access from anywhere securely
- Utilizing Identity Access Management
- Monitoring connections

Building a technologically resilient and agile organization

Intermediate

Presented by Cody Durden, Megamind Security

Two items that sometimes don't fit together, resilient & agile. But in today's organization we need to be both. The need to support business we sometimes need to be able to quickly spin up, destroy, and create new resources quickly; all while making sure what we are doing retains resiliency.

This all requires we have a repeatable process that allows for continuous development. Continuous Integration and Development lends itself to this. We won't cover every aspect

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



of a CI/CD framework, but will instead see how we can use these practices to support our business.

Mass updates

Advanced

Presented by Chappell Hawthorne, EECO

This session will be learning about Exporting data into excel, modifying and importing the data back into P21 with Mass Updates.

Anticipated Allocation

Intermediate

Presented by Evan Trapp, Employee Owned Holdings

Anticipated Allocation is a useful tool to help customer service determine if the backordered product's due date will meet the promise date for the customer. Come learn how to set up Anticipated Allocation, use it, and how your customer service team could benefit from it.

Configuring P21 to Handle Rush Orders

Intermediate

Presented by Kendall Ducote, Moody Price

A case study showing how to use Dynachange Screen Designer, Dynachange Rules, Custom Datastreams, and Crystal Forms to streamline the processing of "Rush Orders" with P21.

Keeping Up-To-Date with Supplier Pricing – Tools & Tips

Beginner

Presented by Barry Hallman, Hallman Consulting & Services, Ltd.

As distributors as being flooded with price increases from their suppliers, it is critical that these price changes are applied to the ERP system in a timely fashion. There are tools to make this easier, and techniques to reduce the amount of effort to accomplish the tasks. We will explore some of the key tools together.

Multidimensional Customer Stratification

Intermediate

Presented by Kendall Ducote, Moody Price

A case study showing how to create and automate customer ranking / stratification using 12 dimensions across 4 categories: Buying Power, Profitability, Loyalty, and Cost to Serve. We will discuss concepts and methodologies, then I will show and share my source code. Intermediate SQL skills will be helpful in understanding the source code.

How to Reduce Credit Card Processing Fees (with important 2023 updates)

Intermediate

Presented by Robert Day, weAudit.com

Businesses are over-billed more than \$100 billion a year in credit card processing. If you think your company is immune from this practice, think again. Robert Day, Managing Partner of weAudit.com, explains how the lack of regulation makes it easy for processors to simply take the money right out of your bank account.

Known as "the Industry Expert" by every major credit association, Robert will teach attendees about deceptive billing tricks and hidden fees that credit card processors impose on businesses. He will discuss how credit card processing works, explain interchange fees including interchange rebates, how to spot "hidden fees", and what your processing rates should be. He will also discuss important updates/changes for 2023.

PCI and Fraud Detection Simplified

Intermediate

Presented by Robert Day, weAudit.com

What is PCI? Do you really need to be PCI compliant?

Robert Day, Managing Partner of weAudit.com, will discuss how to navigate the sometimes very difficult and confusing process of PCI compliance. He will break down how and why you need to be PCI compliant and will detail the easiest and best way to get your PCI certification.

Credit card fraud continues to grow and is an ongoing problem for most businesses. Robert will also discuss the latest information regarding fraud detection and prevention and will give you practical tips on the best way to protect you and your company from credit card fraud.

Identifying customers and implementing dynamic marketing strategies: 8 steps to online merchandising and personalization

Intermediate

Presented by Brendan Cameron, Americaneagle.com

Are you feeling stagnate in your customer growth? Are you allocating resources to marketing but getting minimal ROI? Effective marketing starts with knowing your customers and how to dynamically market to them. In this session, we will take you through the process flow that P21 organizations should understand to feel confident when taking the next step to scale their business using a DXP model.

Getting eCommerce Up and Running NOW!

Intermediate

Presented by Rick Sundahl, Grey Wolf Systems

eCommerce has been the Holy Grail for decades now. But are you up and running yet? What does up and running mean today?

eCommerce has to integrate with P21 and that is just the ante for the game. Now you need to take it to the next level. And not break the bank doing it.

This session will focus on the current state of eCommerce and how to take it to the next level - NOW.

Topics will include:

- What is preventing you from having a successful eCommerce implementation?
- What has changed in the industry to enhance the current eCommerce implementations?
- How to get your eCommerce implementation working now?

Pricing Service

Presented by Michael Dean

This course will teach you how to use pricing services in P21 effectively. Pricing services is a powerful tool to build and update all things around item data in P21. Join to learn how to use pricing service to streamline your manual data updates.

Things you didn't know about your P21 system or may have forgotten

Presented by Michael Dean

This class will cover features of P21 that have been around and might have been overlooked or forgotten.

Inventory and Purchasing

Item merge

Beginner

Presented by Jenny Sagan, Koehler Rubber & Supply

In this class we will go over things you should know before you do item merge. Things you should be aware of and the affects of what happens when you do an item merge.

Balancing Investment, Service Level and Profitability

Intermediate

Presented by Jon Schreibfeder, Effective Inventory Management, Inc.

In today's business environment, it is critical to make each dollar you have invested in inventory work as hard as possible to meet customer's expectations while maximizing your company's net profitability.

In this session we will examine:

- Identifying customer expectations
- Accurately calculating your profitability
- Identifying non-profitable segments of your inventory

- Making sure your replenishment parameters are optimally set to achieve your inventory-related goals

Effective Warehouse Management in 2023

Intermediate

Presented by Jon Schreibfeder, Effective Inventory Management, Inc.

Most distributors cannot find enough warehouse labor. And when they find workers, they have to pay high salaries to retain them. In this session we will explore how to utilize your current system and new technology, combined with effective policies and procedures, to maximize warehouse productivity and minimize the cost of filling orders.

Forced Inventory Reduction

Intermediate

Presented by Jon Schreibfeder, Effective Inventory Management, Inc.

Most distributors, at one time or another, are forced to reduce purchases and their investment in stock inventory. Often organizations take a “knee-jerk” reaction with devastating results. In this session we will look at how to take a methodical approach to decreasing your investment in stock inventory with a minimal affect on customer service. We will help you remove the “fat” from your stock while retaining the “lean muscle” necessary for your continued success.

Processing Inventory Returns

Beginner

Presented by Carolyn Hunt, Hunt Consulting Services

Understanding the importance of inventory returns will help you keep your inventory counts accurate as well as enable your financials to properly report inventory values and any costs associated with returning stock to your supplier. Inventory returns are not, however, just about returning physical stock to the supplier; they can be a more efficient way to correct certain errors that may occur within your system. This session will review the various reasons for using inventory return and how to process each option.

Back to Basics - Part 1 - Order Entry

Intermediate

Presented by Carolyn Hunt, Hunt Consulting Services

Whether a new or long-time user of Prophet 21, we sometimes forget (or are never taught) some of the basic principles of order entry. This session goes through the order entry process to review fields that are important to make sure your order goes from order entry to receipt of payment without error. Don't expect employees to just remember how something is done. Using dynachanges, setting mandatory fields, and adding notes to the order entry screen provide tools that will help the end user "do it right the first time". The fewer errors, the better our customer service and the less rework we have to do as a company.

Inventory System settings review

Presented by Neil Van Walbeck

This session will cover what inventory settings can be changed and why.

Dynamic purchasing, UPTO

Presented by Neil Van Walbeck

This session will cover what drives dynamic purchasing, why we need ABC classes, correct velocity settings and review cycles and how to setup PORG.

Back to Basics - Part 2 - Purchase Orders and Transfers

Intermediate

Presented by Carolyn Hunt, Hunt Consulting Services

Are you sure you are creating your purchase orders and transfers in the most efficient methods possible? Sometimes we need to go back to basics to make sure we understand the meaning of all of the fields in the transactions windows as well as how to best use PO and Transfer Requirement options. Join our class for a review of PO and Transfer processes to make sure you are taking the greatest advantage of what Prophet 21 has to offer. Give your employees the tools they need to do the best job possible, provide superior customer service, and maintain appropriate inventory levels to meet your needs.

**P21WWUG CONNECT 2023
SESSION DESCRIPTIONS
BY SUBJECT TRACK**



Different PORG/TORG settings

Beginner

Presented by Chappell Hawthorne, EECO

In this session we will go over the basics of PORG/TORG system settings and the basic functions of the criteria window.

Item File Best Practices

Beginner

Presented by Chappell Hawthorne, EECO

In this session, we will go through the different tabs in Item Maintenance. We will also work through files setup basics and best practices when setting up a new file.

Assemblies and Kit basics

Intermediate

Presented by Chappell Hawthorne, EECO

In this session will learn about Assemblies and Kits. We will look at the differences between the two and basic setup of both.

Extracting Insights from your Data

Intermediate

Presented by Jon Schreibfeder, Effective Inventory Management, Inc.

Fifty years ago, distributors had to search for data necessary to make informed decisions that would lead to the success of their businesses. Today, the opposite is true. You must search through overwhelming amounts of data to find the information that will help you make intelligent decisions. In this session we will explore how to find and utilize intelligence in the available data in your business environment and computer system.

**Customer Consigned Inventory
Presented by Amanda Martinez**

During this session you will learn how to setup and manage a customer consignment managed inventory program successfully.

**Vessels and Containers
Presented by Christina Kamm**

During this session you will learn how to implement vessel receipts process into your business to get better visibility of your inventory in transit, make receiving inventory simpler via container vs individual PO's. This session will also include possible opportunities for automation.

IT and System Admin

**Intro to the P21 API
Beginner
Presented by Felipe Maurer, Hydradyne**

What we are going to do:

- Talk a little about the P21 API & the documentation on the middleware site
- Cover the tools you can use to make API calls
- But most importantly we will jump right into making API calls
- We will do this in a programming language agnostic way
 - So it doesn't matter if you prefer Python or .Net it will all apply to everyone
- But the P21 API is also too broad to cover in one session.
 - So not all examples will apply to everyone.
- So with that in mind: I will also cover the API calls that will teach you how to make the API call you want.
 - The API call that shows you the required data.
 - So that if we don't cover the exact scenario you are looking for we will cover how to get the information you need to be able to make that API call work.

Getting P21 Core data setup for new implementation

Beginner

Presented by Randee Taylor, Atlas Precision

Setting up drop downs and defaults – making sure you have all of the necessary data points set up for things like users, sales reps, buyers, carriers, and defaults such as customer defaults, item defaults.

Google Tag Manager (GTM) - Customizing, Styling & Expanding the Web UI

Advanced

Presented by Felipe Maurer, Hydradyne

P21 is now a website! Websites are incredibly versatile, and flexible. But they also bring a new set of complexity. The P21 transition to the web has brought many new things, changes, and some losses.

The Google Tag Manager is the perfect tool to compliment, enhance and recover some of these changes. The applications are near endless, and very easy to add!

So we will learn how to install it, and use it to:

- Change the style of P21 - which can bring back themes - but also enhance things greatly
- Capture statistics about P21 - you no longer need to guess what your page load times are
- Capture Screen Recordings - you no longer need to guess how your users caused an error to happen.
- Cobrowse - imagine being able to help users live without starting a remote session.
- Plus many more...

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



Image Capture and Management

Beginner

Presented by Mike Cali, Belmont

Let me show you an application that I built. This application provides seamless integration between your smartphone and Prophet 21. With this app, you can either upload or capture pictures from your phone and directly link them to the items in the Prophet 21 system. The app simplifies the process of cataloging and updating your product information, saving you time and effort. Whether you are in the office or out in the field, this app makes it easy to keep your product information up-to-date and accurate.

When, Why, and How to Create a SQL Stored Procedure

Intermediate

Presented by Barry Hallman, Hallman Consulting & Services, Ltd.

SQL stored procedures can provide functionalities not afforded by standard queries. We will explore some of these advantages and how to implement and exploit them. There will also be discussion of scenarios where stored procedures should or should not be used.

Dynachange screen designer + User Defined Fields

Intermediate

Presented by Spencer Welch, YDBC

We will explore how to use the DynaChange Screen Designer tool, the permissions required, and how to create and use UDF (User Defined Fields).

Self Hosted vs Epicor Azure hosted

Intermediate

Presented by Spencer Welch, YDBC

We will discuss the differences between the two environments and what may work best for your company or situation. Round table type discussion is encouraged to share user experiences.

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



Portals

Intermediate

Presented by Spencer Welch, YDBC

Review basics of Portals and options for how to create and design your own Portals for use within P21 Desktop and Web.

Business Rules - Beginner (VB.NET)

Intermediate

Presented by Spencer Welch, YDBC

Presentation to review what DynaChange Rules are, how they can help your business, what is needed to create a rule, how to create a rule, how to deploy a rule, manage rules, rule samples, and open discussion/questions on DynaChange Business Rules. Primarily focus on DLL (non-visual) rules to use in Desktop and Web versions of P21.

Business Rules - Advanced (VB.NET)

Advanced

Presented by Spencer Welch, YDBC

Presentation to review more advanced topics related to DynaChange Business Rules and how to connect to the SQL Database, how to handle Multi-Row Rules, Event Driven Rules, rule samples, and open discussion/questions on DynaChange Business Rules. This will include Visual Business rules for the Desktop and Web versions of P21.

Power Query and Excel to build P21 Import Templates – Part 1

Intermediate

Presented by John Larimer, MFCP - Motion and Flow Control Products Inc.

Learn how to develop custom templates specific to your business requirements in this 2-part session. P21 imports have very specific requirements, can be difficult to configure and even more difficult to troubleshoot. Excel Power Query is a tool used for the transformation and preparation of data. As you edit Power Queries, you record repeatable steps that run every time you perform a data refresh. The demonstration will introduce you to key Power Query features which includes the Editor, how to combine queries using Merge and Append, building custom columns, ways to improve performance, the

M-Language and more. If you have a need to import data into P21, these sessions are for you!

Power Query and Excel to build P21 Import Templates – Part 2

Intermediate

Presented by John Larimer, MFCP - Motion and Flow Control Products Inc.

Learn how to develop custom templates specific to your business requirements in this 2-part session. P21 imports have very specific requirements, can be difficult to configure and even more difficult to troubleshoot. Excel Power Query is a tool used for the transformation and preparation of data. As you edit Power Queries, you record repeatable steps that run every time you perform a data refresh. The demonstration will introduce you to key Power Query features which includes the Editor, how to combine queries using Merge and Append, building custom columns, ways to improve performance, the M-Language and more. If you have a need to import data into P21, these sessions are for you!

SQL Server Administration 101

Beginner

Presented by Ed Leighton-Dick, Kingfisher Technologies

Everything you do in P21 requires contact with its SQL Server database, so any delays in SQL Server cause problems in your business. The best way to prevent those delays is with regular maintenance. In this session, we'll discuss some of the most common tasks that experienced database administrators (DBAs) do to keep your system running smoothly and reliably.

Cybersecurity Update 2023

Intermediate

Presented by Ed Leighton-Dick, Kingfisher Technologies

Over the last decade, cybersecurity has evolved from a nuisance to one of the most urgent threats to our businesses. Join us as we discuss the current threat landscape and today's best practices for improving your company's cybersecurity defenses.

P21WWUG CONNECT 2023 SESSION DESCRIPTIONS BY SUBJECT TRACK



P21 Business Rule Logging and Debugging Intermediate Presented by Jeff Cleary, Top Notch Distributors

This session will discuss adding detailed logging into your business rule code. We will cover options that provide more structured logging to gain better visibility into the execution of your business rules. This session will detail, what you should log, how to log it and where to best log the data. We will review real world code examples and see this in practice. Additionally this session will also look into methods to debug your business rules in Visual Studio.

Middleware Setup - Getting Ready and Best Practices Intermediate Presented by David Clark, Atlas Precision

This session will go over an ideal set up/approach (on-premise) as well as how to get prepared and set up for an upcoming middleware deployment.

Epicor Report Studio Presented by Michael Dean

This session will review the different capabilities within Epicor's new Report Studio.

SQL Jobs Presented by Michael Dean

TBA

Alerts and Email Integration Presented by Michael Dean

This class will discuss how to use the built-in alert system to send emails when events happen in P21 scheduled imports

SSRS Beginner

Presented by Michael Rea

SQL Server Reporting Studio is a powerful and versatile reporting tool that can allow you to turn your P21 data into meaningful information. In this session we will discuss some different ways that you can use SSRS reports to make your company more efficient. We will then build a simple report with filters and grouping from Prophet21 data.

SSRS Advanced

Presented by Michael Rea

SSRS Advanced will build on the SSRS Beginner session. We will take the simple report built in the SSRS Beginner session make it look better, print better, and make it easier for the users to run including:

1. Print formatting.
2. Adding run dates, page numbers, etc.
3. Turning basic filters into validated filters.
4. Create calculated fields.
5. Field formatting including conditional formatting.
6. Schedule our report so that it automatically runs.

Dynachange For Beginners

Presented by Michael Rea

Dynachange Screen Designer, Dynachange Menu Designer, Dynachange Tabs, Dynachange Portals, Dynachange Navigator and Dynachange Rules, confused by what these are all about and what they could mean to your business? Let's discuss the differences and what we can do with each. We will also dive a little deeper into the basics of how to use some of these tools.

New Users

Production Orders, Assemblies and Kits

Beginner

Presented by Amanda Martinez, C-Line Products, Inc.

This class will review the fundamentals of creating assemblies and kits. we will go over the Assembly Maintenance windows. How to print production orders, production order pick tickets(or suppress them), and bill of materials. You will leave this class with a basic understanding of Assemblies, kits and productions orders.

Setting Units of Measure

Beginner

Presented by Sharon Sale, Flodraulic Group Inc

"How to sell a Baker's Dozen" A brief discussion of how the Unit of Measure set up in Item Maintenance can affect the sales and purchasing modules. Do you buy a roll of hose, but sell in inches or feet? Do you buy in a package quantity and want to keep your users from breaking packages when transferring to another location? Instead of adding the dreaded "Mandatory Note" to an item, you can set up the Units of Measure in Item Maintenance. I will walk through how to set these up and how to avoid some of the most obvious pitfalls of turning this on with existing material in stock.

Inquiring Minds want to Know

Beginner

Presented by Sharon Sale, Flodraulic Group Inc

In this class, we will be discovering the gems hidden in the Inquire screens available in P21. These are excellent tools for Managers, Inside Sales, and Salesreps. Inquiry screens allow you to see information about Orders, Customers, Vendors, and Accounting without opening Transaction Screens. These screens open faster and there is no concern about changing the data. See how to quickly find information that will help you to manage your

branches. We will cover Customer Master Inquiry, Transaction Master Inquiry, Order Inquiry screens, AP, AR, and more....

Order Entry Tips and Tricks

Beginner

Presented by Chappell Hawthorne, EECO

In this session we will learn about simple tips and tricks in Order Entry. Little things that make life better, one user at a time.

Reporting

Warehouse Dashboard

Intermediate

Presented by Kendall Ducote, Moody Price

A case study showing how to create and display a SSRS dashboard on big screen TV in the warehouse to display and prioritize open pick tickets. Prior knowledge of SQL and SSRS will be helpful.

Modifying Crystal Forms – the Basics

Beginner

Presented by Barry Hallman, Hallman Consulting & Services, Ltd.

Modifying the Crystal Forms for Prophet21 does not have to be hard, but often getting started can be difficult. Some basic understanding makes the process much simpler. This session will be largely demonstration to show how to get set up, how to unravel the apparent complexities, and how to make basic changes. The material does not presume any experience with Crystal Reports or the forms modification process.

Modifying Crystal Forms with Custom Datastreams

Intermediate

Presented Barry Hallman, Hallman Consulting & Services, Ltd.

This session is designed for report designers who have acquired basic skills in writing Crystal Reports, and who want to learn more advanced techniques including adding data through Custom Datastreams. Advance formatting and data techniques will also be demonstrated.

SQL Queries 101

Beginner

Presented by Ed Leighton-Dick, Kingfisher Technologies

To create your own reports for P21, the first thing you need to do is to tell SQL Server what data you want. We do this using a SELECT statement, one of the core commands in the SQL language. In this session, we'll discuss the basics of how to craft queries to get the results you want. You'll also leave with tips on how to make your queries perform well - so they don't lock up the system.

Using Crystal to Export Data from P21

Beginner

Presented by Terri Potts, BR Supply, Inc.

In this session, you will learn how to extract data from Prophet 21 using Crystal Reports. You will learn how to find where data is stored, how to create the report and how to export the data. At the end of the session, we will have an open question/answer forum.

External Reports

Beginner

Presented by Terri Potts, BR Supply, Inc.

In this session, you will learn how to create a Crystal Report to use in External Reports. You will also learn how to convert an existing report to use in External Reports. At the end of the session, we will have an open question/answer forum.

Epicor Data Analytics - A Customer's Journey

Beginner

Presented by Candice Powell, Regency Lighting

In this class, we'll share our unique journey of implementing Epicor Data Analytics and demonstrate how EDA is used throughout the organization. We'll discuss how EDA is leveraged to motivate the right behaviors, provide accountability, save time, and provide insights that enable leaders to make better decisions.

Web UI Specific

What do I need to know before moving to the web?

Presented by Michael Dean

This class will cover some tips to keep in mind when moving to the Web UI.

Deep and Dirty DynaChange Rules - Part 1 of 3

Advanced

Presented by Michael Morisoli, Vieon

Part 1 will focus will be on non-visual multi row rules coding techniques including how and why to spend time creating C# classes to help manage the complexity of complex data sets found in order entry lines.

Caveat: I do not claim to be the best programmer, there are many smarter and more talented than myself, but I will share what I have learned the best that I can.

Prerequisite: This will be an advanced class and will assume you are proficient with C#, Visual Studio (or Code) and have a basic understanding DynaChange Rules.

Deep and Dirty DynaChange Rules - Part 2 of 3

Advanced

Presented by Michael Morisoli, Vieon

Part 2 will progress into “easy” Visual rules utilizing the ResponseAttributes class found in the Result object. This clever class provides us with a powerful alternative to the more complex Visual Rules using MVC. See how to add things like labels, text boxes and drop-down combo boxes.

Caveat: I do not claim to be the best programmer, there are many smarter and more talented than myself, but I will share what I have learned the best that I can.

Prerequisite: This will be an advanced class and will assume you are proficient with C#, Visual Studio (or Code) and have a basic understanding DynaChange Rules.

Deep and Dirty DynaChange Rules - Part 3 of 3

Advanced

Presented by Michael Morisoli, Vieon

Part 3 will be the most complex with Visual Rules MVC. My goal will be to demonstrate how to add our own custom data grid that will allow for editing the data and saving it back to SQL. We will get through what we can, given the limited time of the session.

Caveat: I do not claim to be the best programmer, there are many smarter and more talented than myself, but I will share what I have learned the best that I can.

Prerequisite: This will be an advanced class and will assume you are proficient with C#, Visual Studio (or Code) and have a basic understanding DynaChange Rules.

Mass Updates - Basics

Intermediate

Presented by Evan Trapp

Mass Updates has replaced Fast Edit screens in the Web UI. In this session we will discover how to enable Mass Updates, work with Basic Mass Updates, and will explore Excel Mass Updates.

Epicor

Effectively Using Foreign Currency in Prophet 21

Presented by Sandy Sadley, Principal Business Analyst

Economies of the world are tightly intertwined. In this global economy, it is becoming more common to buy or sell in currencies that are not your home currency. You need everything recorded at the proper value. Navigate the ins and outs of foreign currency in P21 to master this tool so you can confidently participate in foreign transactions.

Using Epicor ECM to Automate Processes

Presented by Joe Sapereira, Territory Manager

Epicor Enterprise Content Management (ECM) delivers powerful document-driven process automation tightly integrated with Prophet 21. In this session, discover the features and benefits of ECM with Prophet 21, how to streamline your processes and document management, and the value of Intelligent Data Capture (IDC).

Automate Everything and Integrate Anything with Epicor Automation Studio

Presented by Tom Connelly, Principal Product Manager

Wouldn't it be great if you could future-proof your business by connecting all your data sources into a single platform? That's precisely what Epicor's Automation Studio will do. An intelligent automation platform embedded into Prophet 21 and powered by our partners at Workato, Automation Studio is designed to help you streamline workflows, bridge the IT/business gap, and propel your business forward with newfound efficiency and insights. In this session, you will learn how Automation Studio orchestrates process automation, easily integrates with other systems, and delivers an optimized customer experience.

Analytics and Reporting 101: What to Use, When, and Why

Presented by Erika Margerum, Associate Product Manager

Discover critical business insights using an overview of Epicor analytics, operational, and reporting products to get value out of your data. In this session, you will learn about the

analytics capabilities in products such as Grow, Smart Inventory Planning and Optimization, Report Studio and DynaChange Portals.

ABC's of the P21 Web Application for Administrators
Presented by Andrew Wurzer, Manager, Product Development

If you're an IT administrator, this session is for you. Curious about the browser application? Not sure what to expect when you make the move? This session will walk you through the steps of moving from Windows to the browser application, including application architecture, setting up a test environment, and a conversion checklist.

Discover 5 Helpful Features in the Browser Application
Presented by Meredith McCusker, Senior Principal Product Manager

Explore the Prophet 21 browser-based user interface to discover some of the features that can only be found in the browser application. Join us to learn how to personalize your Prophet 21 workspace, utilize searching and finding, and make the most of reporting.

Simplifying Month-End and GL Reconciliation with New Functionality
Presented by Sandy Sadley, Principal Business Analyst

One of the most time-consuming processes at the end of each month is to produce and archive month-end data in order to reconcile GL accounts. In this session, we'll show you an overview of the new functionality, how to improve efficiencies by reducing keystrokes, and how to easily archive and retrieve data regardless of time period.

Make the Most of Your Sales Opportunities with CRM in Prophet 21
Presented by Marcus Anderson, Sales Engineer

Track pending sales and accelerate sales opportunities with the comprehensive CRM tool in Prophet 21. In this informative session, you will learn about the features and functionality of the CRM tool, how to set up various components of Opportunity tracking, and practices for optimizing usage.

**Tips and Tricks for Maximizing a Support Ticket
Presented by TBD**

We know how important it is for you to get your support tickets resolved quickly so that your operations can run smoothly. It's also important to be armed with all the information you need to ensure your support case goes smoothly from start to finish. In this session, you will learn best practices for creating a support case, tips and tricks to expedite the case, and how to effectively follow a support case through to resolution.

**What's New in Prophet 21?
Presented by Meredith McCusker, Senior Principal Product Manager; Erika
Margerum, Associate Product Manager**

We're continually adding new features and functionality to Prophet 21 in order to deliver the latest technologies to help your business run more efficiently. Join us as we walk through the newest products and enhancements to the Prophet 21 platform, including Epicor Project Hub, Capacity Planning & Production Scheduling, Supplier Integration portal and much more.

Vendor Presentations

**EDI for P21
Presented by Jan Poehland, Comparatio**

Customers or vendors asking for EDI?
What is EDI?
Comparatio EDI for Prophet 21
EDI data formats and processes
eCommerce Integrations, EDI with 3PLs & APIs

**Integrated Distribution Commerce - Why, What and How?
Presented by Aaron Pallares, DCKAP**

Integrated Distribution Commerce is the future, and expanding online sales is necessary for distributors to take their business to the next level. What can distributors do to provide a seamless Amazon-like experience to their customers? Distributors can accomplish this with simple tools and solutions. In this session, we'll show you how. Understand integration, why it's important, learn what the importance of Digital Architecture, a Digital RoadMap, and the Power of Inclusion are, and how to prepare your business to meet the future head-on.

**Supply Chain Issues Still Top-of-Mind?
Presented by Erik Beissel, Absolute Value**

How does your company measure up to having the right inventory at the right place, at the right time? In light of lingering supply chain issues, and new post-pandemic ones enhanced by economic uncertainty, you may have concerns about optimizing your inventory. Absolute Value's Demand Planning system can help.

Demand Planning is a comprehensive inventory planning & replenishment software solution that allows for quick reactions to changes in inventory or demand. It provides planning suggestions with dynamic replenishment that can improve your inventory position and customer service levels.

See how Demand Planning:

- Forecasts visibility up to 52 periods
- Encourages collaboration with customers & vendors
- Offers alerts & key mgmt. controls
- Includes tools to identify & adapt to change
- Enables hub & spoke replenishment
- Shows your inventory levels & investments at a glance
- Extends your P21 system

Absolute Value Demand Planning provides absolute visibility.

**Enable your sales and management teams with Rubber Tree Systems
Presented by Uni Bryant and Kyle Ruhe - Rubber Tree Systems**

Learn why 400 P21 companies trust Rubber Tree Systems for their sales force enablement, CRM, and reporting needs.

Streamline Your Sales Process

- Techniques to optimize your sales process
- Easily access your P21 data
- Collect data from the sales team that syncs immediately to P21

Enhance Customer Focus

- Custom alert notifications to stay focused on the customer
- Quick entry of quotes, orders, CRM activity, and opportunity tracking

Build Effective Dashboards

- Create customized dashboards for your teams needs
- Create your own scorecards and sales, pipeline, inventory, and item analyses

**Maximizing the System Performance of your P21 Ecosystem
Presented by Brad Feakes, Estes Group**

Is your Prophet 21 application lagging? EstesGroup is a Gold Sponsor of this year's P21WWUG event and will be providing a breakout session on the subject of "Maximizing the System Performance of your P21 Ecosystem". The Estes team installs, hosts, and maintains the Prophet 21 ecosystem as part of our daily life. We've therefore encountered an abundance of performance-related issues, and we've developed many tips and tricks to help you better manage the performance of your P21 environment. Database setup. Load balancing. Spindle speed. Middleware server configuration. Scaling up. Scaling out. Client-server interactions. There are many areas to review when setting up and fine-tuning your P21 application. Come join us as we cover the steps you might take to make your system achieve maximum performance.

**Things to consider when integrating or customizing your P21
Presented by Andrew Podner, Atlas Precision Consulting, LLC**

This presentation will cover the pros and cons of doing different types of integrations and customizations with Prophet 21. We will discuss pros, cons, and limitations of each of the P21 API options, Business Rules, Reports, and Portals. Additionally, we will discuss considerations around where and how Prophet 21 can be hosted, including public cloud, private cloud hosting, and on-premise installations.

**Enlighten.Net: Efficient, Simple, Safe Process Automation Solutions for P21
Distributors
Presented by Ellen Richard, Enlighten.Net, Inc**

See how ENet Docs helps P21 distributors increase efficiency and time for profit-building activities. Join this session and learn why almost 100 P21 companies trust Enlighten.Net for their Document Management and AP, AR, and Sales Order Automation Needs.

Our robust solutions help organizations of any size save time and money by providing simple yet powerful tools that are embraced by employees at all levels. With capabilities including full-text search, quick retrieval, and secure access from anywhere, ENet Docs improves your operational efficiency. Our AP Automation, Sales Order Automation, and AR Automation solutions integrate directly with P21 to reduce the errors, time and expense associated with manually processed orders and invoices.

**AI-Powered Purchasing Tips & Tricks
Presented by Samuel Oshay, Recurrency**

During this session, businesses will learn how AI-assistance can address common challenges in their purchasing strategy and execution:

- Time consuming spreadsheet-based planning – reliant on manual data entry and purchasing team intuition to fix usage and generate reactive demand forecasts.
- Working around out-of-date ERP replenishment settings and inflexible order requirement workflows to manually optimize purchases and generate POs.
- Declining profit margins despite higher inventory investment (fill rate issues, persistent stockouts, high transfer costs, despite record inventory levels).

Learn how our current customers use AI-assistance to achieve exceptional performance by:

- Connecting-the-dots to turn your business strategy into effective plans and operational excellence, with real-time measurement and predictive analytics.
- 10x efficiency by using highly accurate, data-driven recommendations. Manage by exception and found free time to focus on new strategic projects.

**From Blank Canvas to Color by Number: How to Ensure Success of Your Sales Team
Presented by Rodney Williams, WebPresented**

Outside sales territories can be seen as a blank canvas - they have the potential to be highly successful, but where do they start, and how do we know if they are on the right track? One of the biggest challenges has always been prioritizing time with sales activities that progress the sales cycle or generate maximum value. With potentially hundreds of accounts and even more opportunities, how can a sales professional know how to spend their time? Analytics within CRM and BI has provided additional insight, but the sea of big data has also complicated the analysis.

There are several ways to approach this challenge, but one of the most effective is to use AI and analytics to help identify patterns and trends. Rodney Williams will be discussing how to align your team's voice, use AI tools to assist decision-making, and integrate a prescriptive way of selling. He will demonstrate how to turn that blank canvas into a color by number and help you guide your sales team to success.

Roundtables

Accounting Roundtable

API Roundtable

Assemblies and Kits Roundtable

Cybersecurity Roundtable

Inventory Roundtable

Manufacturing Roundtable

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New Users Roundtable

Service and Maintenance Roundtable

SQL Server Roundtable

Visual Rules Roundtable

WebUI Roundtable

WWMS Roundtable