



Connections 2018

The Heathman Lodge - Vancouver, WA
July 15 – 18, 2018



Sunday – July 15, 2018

6:00pm – 9:00pm

Registration and Welcome

Beat the crowd - register Sunday night then stay to network with your peers, our partners as well as DM2's Management, Professional Services and Sales Teams.

Monday – July 16, 2018

7:00am – 8:00am

Registration and Networking Breakfast

8:00am – 8:15am

Welcome to Connections

8:15am – 8:45am

DM2 – A PDI COMPANY Keynote

Join Glenn Turner, PDI's SVP & GM Wholesale & Logistics, for an overview of our company, vision, mission, strategy including rationale for the DM2 acquisition and the value and benefits it creates for our customers.

8:45am – 9:30am

Sage Keynote

Join Nancy Harris, Sage's EVP, to learn about all of the new cloud and cloud connected services Sage has to offer now as well as what's on the horizon.

9:30am – 10:00am

Comfort Break

10:00am – 11:30am

Transitioning to the Cloud

Learn how our DM2 and Sage solutions are leveraging on-premise with **Cloud and Cloud - Connected** applications and services to maximize your existing investment and provide you with a path to start transitioning to the cloud today. Join Tom Wilson, **Sage Inventory Advisor** Product Specialist, to see the cloud connected concept in action and find out how this service will help you improve your forecasting to optimize your inventory.

11:30am – 1:00pm

Lunch

1:00pm – 2:30pm

AR Management Practices, Procedures, Strategies & Tools

Join DM2, and special guest, Ann Pitts of **The Pitts Group** to find out about the latest Accounts Receivable practices, procedures, strategies and tools available to reduce your DSO and bad debt write-offs.

2:30pm – 3:00pm

Networking Break

3:00pm – 5:00pm

What's New at DM2

Join DM2 for a **New Feature Review** and to learn how our **New Product Update** process can get these features on your system and in your hands faster. Find out more about the exclusive benefits and features available on the **Sage 100Cloud** platform. Also learn how our new **API-enabled Partnership Strategy** makes integrating with your **Petroleum Insights** systems and becoming part of the **DM2 and Sage Eco-system** easier than ever.

6:00pm – 8:30pm

Networking Reception & Dinner

Enjoy drinks, dinner and networking with your peers, our Strategic partners as well as the entire DM2 staff.





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Tuesday – July 17, 2018

7:00am – 8:00am

Networking Breakfast

8:00am – 9:30am

Training Tracks

CardLink I

- Learn how the new Card Management features we've added make working with multiple fleet fueling cards and networks easier than ever before by eliminating the need to make multiple, error prone entries
- See how our eCardLink web portal can improve customer satisfaction while reducing your administrative overhead by giving your cardlock customers the ability to perform account, driver, and vehicle maintenance, make transaction inquiries, and generate fuel usage and billing reports

Wholesale I

- Learn how the new Retain Warehouses & BOL Tracking feature will help reduce manual entries and ensure more accurate margins
- Find out the latest additions to **Scanco's** Warehouse Management system can improve inventory accuracy and streamline your receiving and order fulfillment processes
- See how the new customer onboarding and special pricing approval process workflows we've added to **Petroleum Insights CRM** will help improve customer satisfaction and your cashflow

9:30am – 10:00am

Networking Break

10:00am – 11:30am

Training Tracks continued

CardLink II

- See how the new customer onboarding and special pricing approval process workflows we've added to **Petroleum Insights CRM** will help improve customer satisfaction and your cashflow
- Learn how the new **Unified Fuel & Sales Taxes** feature saves time and ensures accuracy throughout your system

Wholesale II

- Learn how our new **Margin Management** tool will help you maximize and ensure more accurate margins
- Find out how the PDI family is helping carriers deliver over 95 million gallons a day with an overview of the new PDI logistics line-up.
- Take truck automation to the next level with our strategic partnership with **SkyBitz** – see how our new Product Movement feature helps you track every gallon.

11:30am – 1:00pm

Lunch

1:00pm – 2:30pm

Training Tracks continued

CardLink III

- Find out how the **Advanced Margin Management** tools we've developed and Powerup Fleet margin adjusters we've added can help you identify opportunities to optimize margins to increase site volumes and maximize revenue
- Learn how the new **Petroleum Insights ALERTS** events pack we've added to Sage Alerts & Workflow makes getting the right information to the right people at the right time on the right device easier than ever. See how to automate the generation and delivery of invoices to customers, purchase orders to suppliers, and reports to managers.

Wholesale III

- Find out how to streamline managing consignment sales by automating the import of tank level readings, calculation of commission splits and generation of consignee invoices with our **Consigned Station** portal
- Learn how the new **Petroleum Insights ALERTS** events pack we've added to Sage Alerts & Workflow makes getting the right information to the right people at the right time on the right device easier than ever. See how to automate the generation and delivery of invoices to customers, purchase orders to suppliers, and reports to managers.

2:30pm – 3:00pm

Networking Break

3:00pm – 4:30pm

Training Tracks continued

CardLink IV

- See how you can free up your staff to focus on growing your business by giving your customers the ability to order, pay, and access their account information online with **websitepipline's** eCommerce options
- Learn how **Sage Enterprise Intelligence** gives you the power to easily create and analyze reports, dashboards or views on your own that are specific to your job - with no special expertise required

Wholesale IV

- Learn how **Sage Enterprise Intelligence** gives you the power to easily create and analyze reports, dashboards or views on your own that are specific to your job - with no special expertise required
- See how you can free up your staff to focus on growing your business by giving your customers the ability to order, pay, and access their account information online with **websitepipline's** eCommerce options

4:30pm – 5:30pm

Partner Cocktail Reception

6:00pm – 8:30pm

Dinner



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Wednesday – July 18, 2018

7:00am – 8:00am

Networking Breakfast

8:00am – 10:00am

Did You Know?

Find out about the benefits of using the new Sage Payroll 2.0 application to manage your payroll and learn more about the upgrade and support processes and other resources available from DM2 and Sage to help you get the most out of your *Petroleum Insights ERP and CRM* systems

10:00 – 10:15am

Comfort Break

10:15am – 11:45am

What's Next?

11:45am – 12:00pm

Q&A/Closing Remarks

12:00pm -

Departures

