



**Tuesday September 14, 2010 Registration & Welcome Reception—6:00 - 8:00**

*Unwind with us and pick-up your welcome packet.*

**Wednesday September 15, 2010 Event/Session**

8:00 to 8:30 Continental Breakfast

8:30 to 9:00 **Tom Gebes** – State of BuilderMT and Introductions

9:00 to 9:45 Sage Timberline Software will be presenting a high level overview of their position in the construction accounting market.

Following the introduction, will be a half hour overview of Sage Timberline Enterprise, the latest accounting product from Sage Construction and Real Estate Division.

9:45 to 10:30 Explorer Software will be presenting a high level overview of their position in the construction accounting market worldwide. This session will be very informative for both the Explorer Trueline HomeBuilder clients as well as BuilderMT clients.

Following the introduction, will be a half hour overview of Contract Manager Version 7, the latest web based accounting product for construction to hit the market.

- Explorer's Contract Manager also offers such features as:
  - Unlimited user-defined fields
  - Customizable dashboards
  - Key Performance Indicators (KPI's) for all levels of staff; superintendents, executives, accounting, warranty, sales, production, etc.
  - The ability to calculate in multiple currencies, using multi-national tax systems, and even multiple languages.
  - Additionally, with an Excel-like interface and a report wizard, Explorer can output fully-formatted Excel workbooks and allow users to design their format in Excel-like grids, all while merging data across multiple servers and companies.
  - Configurable input screens (browser based)
  - And much more.....
- There will also be a high level presentation of the integration between WMS and Contract Manager:
  - Background replication of Job and Supplier and Check Payment information. Benefits: Easier Job/Supplier setup
  - True multi user integration of budgets, Pos and Invoices. Benefits: no more waiting to Send to Accounting; aka "No more Macros"
  - Improved notifications and error handling when Issuing Budgets. Pos and Invoices to accounting. Benefits: Less down time dealing with data/integration issues, no more partial imports.

10:30 to 10:45 Break

10:45 to 12:00

***Choice of Sessions – Note: Sessions Run Simultaneous***

**Sales Simplicity Barry Forbes – "Future Technology Direction of Sales Automation Software"**

- Homebuilder Sales and Marketing is ever-changing and evolving
- Sales Simplicity is at the forefront of this marketplace
- A view of the future as we see it
- How we fit into this vision today
- What's next - and it is huge!

**BuilderMT – Developer Discussion – "Future Technology Direction" - Grahame Price and Sara Kalfas**

- Product Roadmap
- BPM update
- BMT.net strategy
- Database strategy
- Integration strategy
- Developer Partner support using the API



<b>Wednesday September 15, 2010</b>			<b>Event/Session – Continued</b>		
12:00 to 1:00 Lunch					
1:00 to 3:00			<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>		
<p><b>Sales Simplicity Session I</b> <b>Bob Nocon - Sales Simplicity Overview for Set-Up</b></p> <ul style="list-style-type: none"> <li>• Our new integration partners</li> <li>• Signing on with our integration partners, including show discounts</li> <li>• Adding new integration opportunities on-the-fly</li> <li>• Other potential integration partners</li> </ul>	<p><b>Beyond the Core – Benefits as You Grow – Session I – Rick Newberg</b> Out of the box thinking for owners and those that make strategic decisions &amp; Advanced Users</p> <p><b>Estimating</b> Using Sage Timberline Office Estimating to Estimate, bid and manage your Land Development Projects</p> <ul style="list-style-type: none"> <li>• Database Considerations</li> <li>• Takeoff Methods</li> <li>• WMS Purchasing</li> </ul> <p><b>Using Sage/Timberline Office Estimating to Estimate and Buyout your Custom Home projects</b></p> <ul style="list-style-type: none"> <li>• Estimating Database</li> <li>• Building the Estimate for a Custom House</li> <li>• Reporting</li> <li>• WMS Purchasing</li> <li>• On-Screen Takeoff</li> </ul>	<p><b>BuilderMT WMS Soup to Nuts Training Session I – Donna Barden and Rita Killam</b></p> <p><b>WMS Setup &amp; Settings</b></p> <p>Overview of WMS Settings and What affect they have on your Workflow</p> <ul style="list-style-type: none"> <li>• Company Setup</li> <li>• Accounting Integration</li> <li>• Estimating Integration</li> <li>• Division Setup</li> <li>• Desktop Configuration</li> <li>• Security</li> </ul>			
3:00 to 3:15 Break					
3:15 to 5:00			<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>		
<p><b>Sales Simplicity Session II</b> <b>Danny Forbes - CRM functionality suite, dramatic changes this.</b></p> <ul style="list-style-type: none"> <li>• Dramatic changes this year</li> <li>• New screen designs</li> <li>• Powerful new functionality</li> </ul>	<p><b>Beyond the Core – Benefits as You Grow – Session II – Mike Morgan Sales &amp; Purchasing (3:15-4:15)</b></p> <ol style="list-style-type: none"> <li>1) Cost analysis using Sales Worksheets</li> <li>2) Project/Community baseline analysis</li> <li>3) Printing Sales Sheets from Worksheets</li> <li>4) Adding non-constructions to the Purchasing budgets             <ol style="list-style-type: none"> <li>a) Budget only items</li> <li>b) Revised margin analysis</li> </ol> </li> </ol> <p><b>Trade Portal &amp; Scheduling (4:15-5:00)</b></p> <ol style="list-style-type: none"> <li>1) Using Scheduling in cash flow projections</li> <li>2) Tracking non-construction tasks on schedules             <ol style="list-style-type: none"> <li>a) Pre and Post construction tasks</li> <li>b) Internal Notifications</li> </ol> </li> <li>3) Bidding through Trade Portal</li> <li>4) Payment research by Trades</li> </ol>	<p><b>BuilderMT WMS Soup to Nuts Training – Session II Basic Workflow – Donna Barden and Rita Killam</b></p> <p><b>Streamline your Daily Workflow</b></p> <p><b>-- From Dirt to Closing</b></p> <p>Make your life easier by maximizing productivity with fewer resources. Learn how to use WMS features to reduce unnecessary steps.</p>			
5:00 to 7:00			<b>Staff and Sponsor Mixer - Meet and greet with BuilderMT and Sales Simplicity staff and strategic technology and service providers.</b>		



Thursday September 16, 2010		Event/Session
8:00 to 8:30		Continental Breakfast
8:30 to 10:30		<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>
<b>Sales Simplicity Session III</b> <b>Danny Forbes - Analytics</b> <ul style="list-style-type: none"> <li>• What it means to a builder - wow!</li> <li>• Lead data to website traffic</li> <li>• How easy is it to implement? Very.</li> <li>• View detailed data on a lead's interest before/after sign-up</li> <li>• Automated reporting kicks in, delivering lead/web traffic to sales people</li> </ul>	<b>BuilderMT WMS Soup to Nuts Training – Session III</b> <b>– Donna Barden and Rita Killam</b> <p>Exceptions &amp; Variances Special Situations &amp; Unexpected Occurrences</p>	
10:30 to 10:45		Break
10:45 to 12:00		<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>
<b>Sales Simplicity Session IV</b> <b>John D. Wagner - Social Media and Home-Grown PR Strategies</b> <ul style="list-style-type: none"> <li>• Facebook, Twitter, Linked-in - why it's big, and getting bigger</li> <li>• Get on board. Here's how, what, where, why, when</li> <li>• Are you "getting press?" It's easy, free, and valuable. Here's how.</li> </ul>	<b>BuilderMT WMS Soup to Nuts Training – Session IV</b> <b>– Donna Barden and Rita Killam</b> <p>Supplier Cost Management Manage Supplier costs more Efficiently &amp; Effectively</p>	
12:00 to 1:00		Lunch
1:00 to 3:00		<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>
<b>Sales Simplicity Session V</b> <b>Bob Nocon - Reporting and Dashboards</b> <ul style="list-style-type: none"> <li>• Overview of existing reports and dashboards</li> <li>• New dashboards on the way</li> <li>• What do you want to see?</li> </ul>	<b>Builder Forum</b> – Moderated by John Wagner. Client homebuilding award winners and "power-users" will be represented on the panel.	
3:00 to 3:15		Break
3:15 to 5:00		<b>Choice of Sessions – Note: Sessions Run Simultaneous</b>
<b>Sales Simplicity Session VI</b> <b>The Team - Questions and Answers</b> <ul style="list-style-type: none"> <li>• Builder sharing forum</li> <li>• What problems are you having?</li> <li>• What do you want to see in the application that we haven't discussed?</li> <li>• Challenges you are experiencing</li> <li>• Hands-on training, one on one</li> <li>• What can we do better?</li> </ul>	<b>BuilderMT Voice of the client - BuilderMT Staff</b> <p>We are listening! This is your opportunity to tell us:</p> <ul style="list-style-type: none"> <li>➤ What's working?</li> <li>➤ What's not working?</li> <li>➤ What's not happening that should be happening?</li> <li>➤ What's happening that should not be happening?</li> <li>➤ Suggestions for changes to existing processes/product/workflow</li> <li>➤ Suggestions for new processes/product/workflow</li> <li>➤ What one thing would make the biggest difference?</li> </ul>	
5:30 to 8:00		<b>Dinner Cruise on the Lake</b> – enjoy this opportunity to continue discussions with BuilderMT Staff, service providers and other clients. Dinner and entertainment is included.



Client Conference  
Coeur d'Alene, Idaho

**BuilderMT & Sales Simplicity  
Client Conference 2010 Coeur d'Alene  
"Your Ideas at Work!" Agenda**

**Friday – September 17, 2010 Event/Session Detailed Breakouts**

9:00 to 9:30 Continental Breakfast

**Ask the EXPERT session run simultaneously – each session is 45minutes  
Choice of sessions:**

**Tips & Tricks on Core Products / Consulting / Q&A / Networking** – These sessions will be repeated to accommodate clients that would like to attend more than one session. Session times are:

- **9:30 to 10:15**
- **10:20 to 11:05**
- **11:10 to 11:55**

**Also during this time, you have the option of signing-up on site for one-on-one time with a consultant.**

**Technical (IT) and Support Services Session with Roger Long & Kim Slusser**

This session will cover:

- Installs, Upgrades, and Migrations
  - How-to
  - What to watch for
  - Recommended Configurations
- Trade Portal
- Network
  - General
  - Exchange
  - Services
- Most commonly reported support issue and how you can avoid them
- Troubleshooting techniques
- How can we make your support experience better?
- Open Q & A

**Sales Integration & Sales Simplicity Session with Grahame Price and Barry Forbes**

This session will cover:

WMS Workflows

- Setting up to send to Sales Simplicity
- Sending and monitoring data flow
- Receiving Sales Contracts from Sales Simplicity
- Non standard workflows
- Cleaning up old Jobs/Lots for a new start.

Sales Simplicity Workflows & Features  
(TBA by Barry Forbes)

**Warranty (CSW) Session with Mike Morgan**

This session will cover:

Work-order Process Overview

- Attachments
- Notes
- Additional (custom) fields

Miscellaneous Management

- Homeowner Records
- On-Call Schedules
- Work plans

Reporting



Client Conference  
Coeur d'Alene, Idaho

## BuilderMT & Sales Simplicity Client Conference 2010 Coeur d'Alene "Your Ideas at Work!" Agenda

### **Business Process Management (BPM) with Richard Hack**

This session will cover:

- **Open Q + A**
- **Tips and Tricks**
  - Tool setup
  - Composer to make life easier
  - Naming conventions to make life easier
  - Themes to make life easier
  - Right click it
  - Testing and debugging
- **How To ...**
  - Connect to multiple databases
  - Error handling
  - Versioning
  - Escalations
- **BPM Community Support**
  - Links to the BPM community + forums
- **BPM Keys to Success**

### **Reporting (RPT) all Products with Sara Kalfas**

This session will cover:

Data Structure

Database

Tables, Records and Fields

Keys

Data Dictionary

Table Relationships

One-to-One

One-to-Many

Many-to-Many

Making an ODBC connection for Crystal Reports

**12:00 to 2:00 | Lunch and closing session**