



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



Client Conference
Coeur d'Alene, Idaho

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

	3) Bidding through Trade Portal 4) Payment research by Trades	
5:00 to 7:00	Sponsor Appreciation Mixer Meet and greet with BuilderMT strategic technology and service providers	



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

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



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



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