



Welcome to the EPASS User Meeting 2023

Vancouver, B.C. Canada



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On behalf of the entire EPASS team, I would like to welcome you to our 2023 EPASS User Group Meeting. The entire team is excited to have you and we can't wait to share everything that we've been working on this past year.

One of the things that we're most excited about is our new meeting format! This year, we have three rooms where we're hosting various events, training sessions, and special presentations over the next four days.

In addition to the new format, we've also made sure to include more of the content you've been asking for! More training sessions for new users of EPASS, opportunities to network with your fellow attendees, Q&A sessions with the EPASS Development and Support Teams, and a dedicated "EPASS for Service" event.

And of course, what would an EPASS User Meeting be without some fun! On Friday night, we'll "set sail" on our evening dinner cruise where you can enjoy some delicious food, imbibe a few cocktails, and take in the natural scenic beauty of Vancouver.

We hope you enjoy your time here at the User Meeting and that you find it not only informative, but fun!

Thank you for attending and I look forward to seeing you.

Sincerely,

Nick Faiola
President



USER MEETING 2023 - VANCOUVER

October 18 - 21

Crystal Pavilion - Pan Pacific Vancouver

Schedule

DAY 1 - Wednesday, October 18

Time	Room A	Room B	Room C	Foyer
8-9	Breakfast – Cypress Room			
9-10	Welcome and Morning Kick-Off			
10-10:15 Break				
10:15-11	EPASS Pay Presentation			
11-12	BrandSource Presentation		EPASS AMA (Session #1) One on one with EPASS Support and Development	
12-1	Lunch – Cypress Room			<u>Vendor Booths</u> BrandSource MyPartsHelp
1-2:15	EPASS Feature Highlights – Accounting: AR AP GL	Breakaway: Accounting Basics	Networking Roundtable	
2:15-2:30 Break				
2:30-3:30		Breakaway: Dispatching Basics		
3:30-5		Breakaway: Inventory Mgmt./Inventory		

All sessions and locations are subject to change. Updates and changes to the schedule are announced during the day's "Morning Kick-off".



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DAY 2 - Thursday, October 19

Time	Room A	Room B	Room C	Foyer
8-9	Breakfast – Cypress Room			
9-9:30	Morning Kick-Off			Vendor Booths Nationwide MyPartsHelp Package.AI
9:30-10	EPASS Warehouse Managements System Presentation			
10-10:15 Break				
11-12	Nationwide Presentation		EPASS AMA (Session #2) One on one with EPASS Support and Development	
12-1	Lunch – Cypress Room			
1-2:15	EPASS Feature Highlights: A discussion and demo of several exciting new EPASS Features	Breakaway: Month End	Package.AI Presented by Ralph Shulberg	
2:15-2:30 Break				
2:30-3:30	EPASS Feature Highlights: A discussion and demo of several exciting new EPASS Features	Breakaway: Crystal Reports Basic	Breakaway: EPASS Best Practices	
3:30-4:15		Breakaway: Crystal Reports Advanced		
4:15-5	EPASS Reports			

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DAY 3 - Friday, October 20

Room A: Sales Focus | Room B: SERVICE 101 | Room C: EPASS for Service with Paul MacDonald and the Vendor Partners

Time	Room A	Room B	Room C	Foyer
8-9	Breakfast – Cypress Room			Vendor Booths JustPressOne MyPartsHelp Package.AI
9-9:30	Morning Kick-Off			
9:30-10	Sales Features: Dispatching			
10-10:15 Break				
10:15-11			Profitable Service Rates	
11-12	Sales Features: Purchasing	SERVICE 101: Purchasing for Service Basics	Warranty Claims Mgmt. Presented by Janice Salmon	
12-1		Lunch – Cypress Room		
1-2:15		SERVICE 101: Dispatching for Service Basics	Warranty Claims Processing in EPASS	
2:15-2:30 Break				
2:30-3:30	Sales Features: Invoicing	SERVICE 101: Warehousing for Service Basics	MyPartsHelp Presented by SCS	
3:30-4			Integrating BlueBook with EPASS	
4-4:30			The Importance of Reviews ,Communicating with Customers, and Efficient Service Dispatch	
4:30-5				

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DAY 4 - Saturday, October 21

Room A: Service Focus | Room B: SALES 101

Time	Room A	Room B	Room C	Foyer
8-9	Breakfast – Cypress Room			
9-9:30	Morning Kick-Off			
9:30-10	Service Feature: Purchasing	Price List Template Setup and Importing	Networking Roundtable	
10-10:15 Break				
10:15-11		Builder Process Flow		
11-12	Service Features: Dispatching	Auto-Reserve Utility and Mass Unreserve		<u>Vendor Booths</u> MyPartsHelp
12-1	Lunch – Cypress Room			
1-2:15	Service Features: Invoicing	SALES 101: Invoicing and Purchasing Basics		
2:15-2:30 Break				
2:30-3:30		SALES 101: Dispatching Basics		
3:30-4:30	Service Features: Mobile Tech	SALES 101: Physical Inventory		
4:30-5				

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Attendee List

The EPASS Team

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Attendees

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