

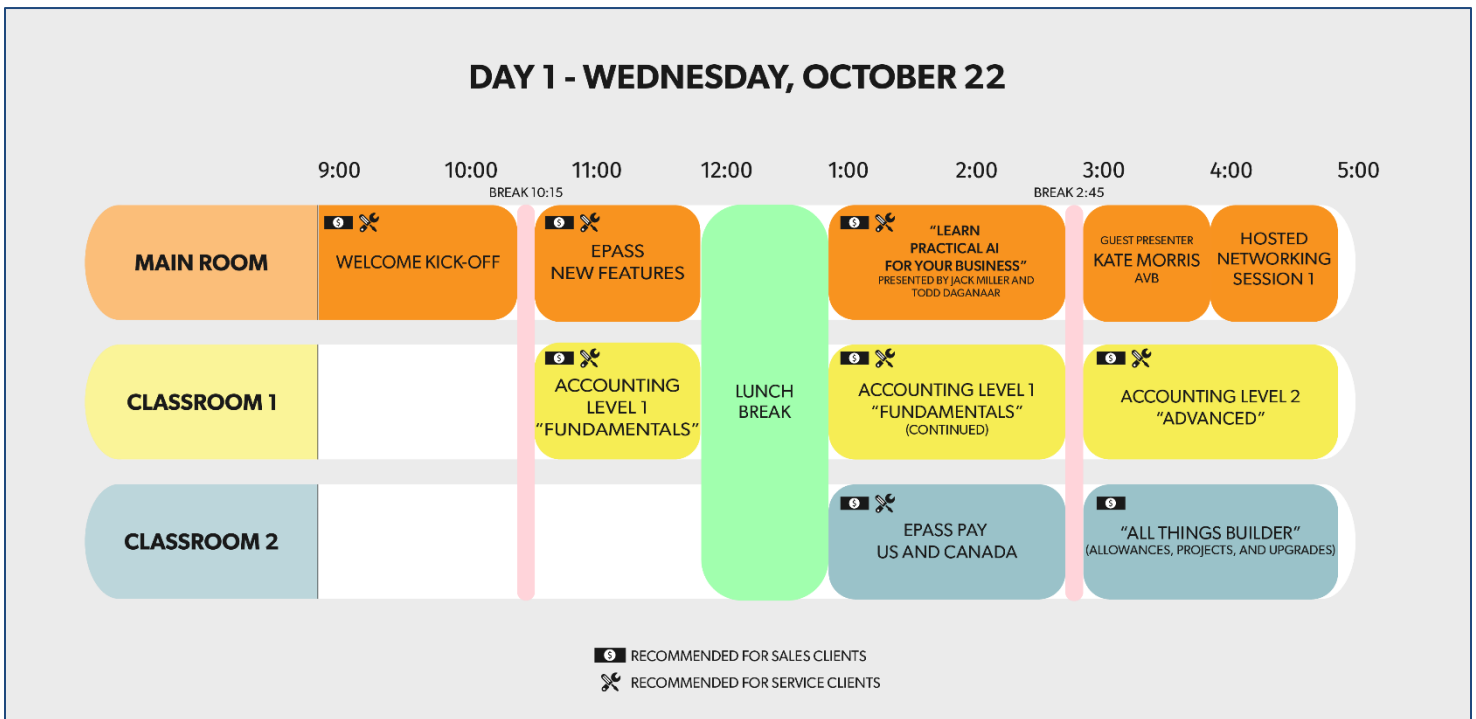


User Conference 2025

Wednesday, October 22nd — Friday, October 24th

Daily Schedule

Start times are approximate. Schedule is subject to change. Any changes made will be clearly communicated during the day's morning "Kick-Off".



Session	Start Time	Description	Room
Welcome Kick-Off	9:00 am	Welcome to the conference! We get things started with a rundown of what to expect in the next three days and play a fun icebreaker game!	Main



Session	Start Time	Description	Room
EPASS New Features	10:30 am	Ryan Scherpenisse and Inder Raina demonstrate some new and exciting EPASS features!	Main
Accounting Level 1 “Fundamentals”	10:30 am	This introductory course to is perfect for new community members or those who don’t currently use EPASS for accounting. It’s also a great refresher for our EPASS veterans!	Classroom 1
“Learn Practical AI for Your Business”	1:00 pm	Join Jack Miller (Service Company Solutions) and Todd Daganaar (Hometown Hero Appliance Repair) and explore simple, inexpensive ways to begin using AI in your daily operations, from repetitive process automation to content creation and data analysis!	Main
EPASS Pay for US and Canada	1:00 pm	This course will cover the fundamentals of EPASS Pay for our US and Canadian clients. We’ll explore modifying setup, accepting various payment types, analyzing data through Merchant Track, and more! It’s a great session for both new and current EPASS users!	Classroom 2

Session	Start Time	Description	Room
Special Guest Presentation Kate Morris from AVB Marketing	3:00 pm	Join Kate Morris from AVB Marketing as she speaks on the integration between EPASS and AVB HUB and demonstrates the AVB HUB quote feature.	Main
Accounting Level 2 “Advanced”	3:00 pm	Accounting Level 2 follows-up with more advanced accounting topics for EPASS veterans or someone who wants to do more with EPASS accounting tools.	Classroom 1
“All Things Builder” (Allowances, Projects, and Upgrades)	3:00 pm	A comprehensive course that covers the entire process of selling to builder clients and managing multi-home projects. If you have builder clients, this is the perfect opportunity to learn how to use the tools available in EPASS or discover new tips if you’re already familiar with them.	Classroom 2
Hosted Networking Session 1	4:00 pm	Your chance to discuss EPASS with your fellow users! These sessions are moderated by an EPASS Team Member and will cover a wide range of discussion topics.	Main

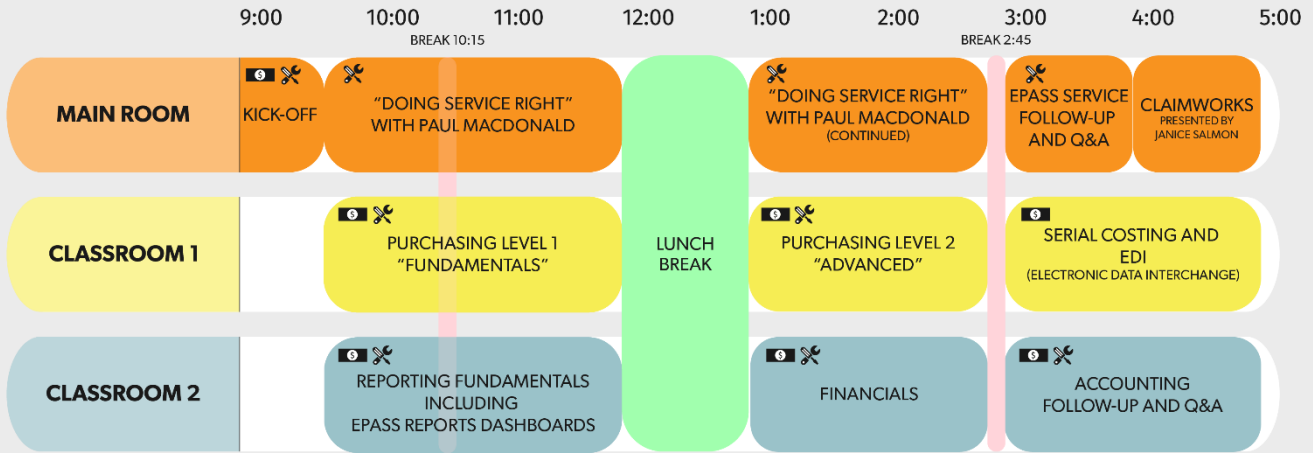


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R&D Business Systems Ltd.
TF: 888.629.4218
sales@epass.software

DAY 2 - THURSDAY, OCTOBER 23



E RECOMMENDED FOR SALES CLIENTS
X RECOMMENDED FOR SERVICE CLIENTS

6:00 - THURSDAY NIGHT DINNER EVENT AT THE PAN PACIFIC HOTEL! COMPLIMENTARY FOR ATTENDEES OF ALL 3 CONFERENCE DAYS. GUESTS: \$199.

Session	Start Time	Description	Room
Kick-Off	9:00 am	We kick things off with a preview of Day 2 sessions!	Main
"Doing Service Right" with Paul MacDonald	10:00 am	Attention appliance service professionals! Don't miss the chance to gain invaluable insights from Paul MacDonald, an acknowledged expert in the appliance service industry. Paul will lead a dynamic session on Service Best Practices designed to supercharge your operations and leverage the full power of EPASS software.	Main



Session	Start Time	Description	Room
Purchasing Level 1 “Fundamentals”	10:00 am	Covering everything you need to know when it comes to purchasing inventory in EPASS! Level 1 is perfect as a refresher or if you’re new to EPASS.	Classroom 1
Reporting Fundamentals Including EPASS Reports Dashboards	10:00 am	In this session, we’ll look at the powerful reporting capabilities of EPASS and identify key reports and how to use them. We’ll also cover important mechanics of our web-based EPASS Reports platform, such as scheduling and bursting, and take a deep-dive into the brand new “EPASS Reports Dashboards.” Recommended for EPASS users of all skill levels.	Classroom 2
Purchasing Level 2 “Advanced”	1:00 pm	Covering everything you need to know when it comes to purchasing inventory in EPASS! Level 2 follows-up with advanced topics and techniques that will benefit all EPASS clients.	Classroom 1

Session	Start Time	Description	Room
Financials	1:00 pm	Unlock the full potential of EPASS financial modules. This course covers best practices for managing General Ledger, Accounts Payable, and Accounts Receivable, ensuring efficient and accurate financial operations. Perfect for new or experienced EPASS users!	Classroom 2
EPASS for Service Follow-Up and Q&A	3:00 pm	A follow-up to the day's main service-focused event, this session will give you an opportunity to discuss service-related issues with an EPASS Team Member and your fellow attendees.	Main
Serial Costing and EDI	3:00 pm	Learn how to take advantage of the Serial Costing utility in EPASS to reduce the manual work required to cost individual line items for each PO invoice. We'll also look at leveraging the power of Electronic Data Interchange files!	Classroom 1
Accounting Follow-up and Q&A	3:00 pm	A follow-up to the Day 1 Accounting courses. We cover remaining questions from the previous day and answer new ones! Open to all and recommended for attendees of Accounting Level 1 and Level 2.	Classroom 2

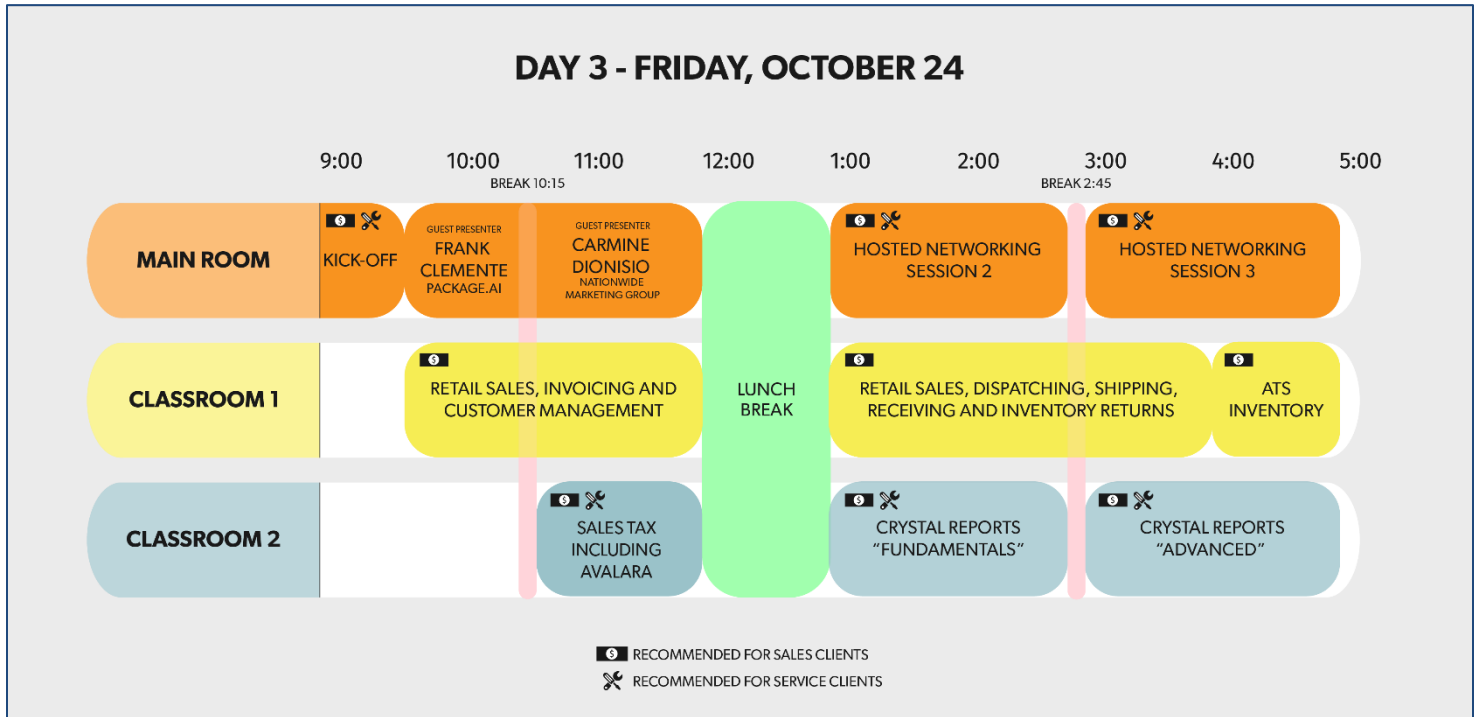


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Session	Start Time	Description	Room
ClaimWorks Presentation Janice Salmon from JustPressOne	4:00 pm	Join Janice Salmon from JustPressOne as she demonstrates ClaimWorks, their latest solution for service company claims.	Main



Session	Start Time	Description	Room
Kick-Off	9:00 am	Our final kick-off gives you a preview of everything happening on Day 3!	Main
Special Guest Presentation Frank Clemente from Package.ai	9:30 am	Join Frank Clemente, Customer Success and Onboarding Manager of Package.ai, for an informative look at the latest innovations in AI-powered solutions for customer engagement and last-mile logistics.	Main

Session	Start Time	Description	Room
Retail Sales, Invoicing and Customer Management	9:30 am	This training session covers essential techniques for managing sales, invoicing, and customer interactions efficiently, ensuring you maximize productivity and enhance customer satisfaction.	Classroom 1
Special Guest Presentation Carmine Dionisio from Nationwide Marketing Group	10:30 am	Our guest Carmine Dionisio, Senior Manager – Business Services at Nationwide Marketing Group, shares his insights on marketing and operational support for independent retailers in the industry.	Main
Sales Tax Including Avalara Integration	10:30 am	Discover how to efficiently configure and update sales tax rates in EPASS. This course covers essential steps to ensure accurate tax calculations and compliance with current regulations. Additionally, we'll introduce our integration with Avalara, a software designed to enhance efficiency and accuracy by automating tax compliance.	Classroom 2

Session	Start Time	Description	Room
Hosted Networking Session 2	1:00 pm	Your chance to discuss EPASS with your fellow users! These sessions are moderated by an EPASS Team Member and will cover a wide range of discussion topics.	Main
Retail Sales, Dispatching, Shipping, Receiving, and Inventory Returns	1:00 pm	As a direct follow up to the previous session, we include essential techniques for dispatching, shipping, receiving, and managing inventory returns, ensuring smooth and effective workflows.	Classroom 1
Crystal Reports “Fundamentals”	1:00 pm	Master the art of creating custom Crystal Reports and importing them into EPASS Reports. This comprehensive session covers the fundamental techniques needed to design powerful, data-driven reports.	Classroom 2
Hosted Networking Session 3	3:00 pm	Your chance to discuss EPASS with your fellow users! These sessions are moderated by an EPASS Team Member and will cover a wide range of discussion topics.	Main



Session	Start Time	Description	Room
Crystal Reports “Advanced”	3:00 pm	Master the art of creating custom Crystal Reports and importing them into EPASS Reports. This advanced session covers techniques that you can use to create data-driven reports tailored to your specific needs.	Classroom 2
ATS Inventory	4:00 pm	Looking for an efficient way to inform your sales team about current inventory levels? In this session, we’ll show you how to leverage the ATS calculation—a powerful tool for sales information.	Classroom 1