Vision Municipal Solutions

Annual Conference

October 8th – October 10th 2014, Leavenworth, WA

Welcome to the Vision 2014 Conference! We are excited to be back in Leavenworth to get to know the newest members of the Vision family and re-connect with our long-time Vision customers and dear friends.

2014 Conference Agenda

WEDNESDAY, OCTOBER 8TH, 2014					
7:30am - 9:00am	**4TH FLOOR, CONTINENTAL BREAKFAST**				
	ALPINE ROOM (LOWER LEVEL)				
9:00am – 9:30am	**OPENING CEREMONIES & CONFERENCE OVERVIEW** *Welcome Leavenworth Mayor – Cheri Farivar*				
9:30am – 9:45am	**VISION'S STATE OF THE UNION ADDRESS**				
	Break Time				
	VIENNA ROOM	**DANUBE ROOM**	**BAVARIAN ROOM**	**ALPINE ROOM**	**SALZBURG ROOM**
10:00am – 12:00pm	**VISION RECEIVABLES** *Miscellaneous Billing*	**VISION FINANCIALS** *Tract 1*	**VISION REPORTING SERVICES** *Introduction*	**VISION UTILITIES** *Tract 1*	***VISION FORMS & OUTSOURCING***
12:00pm – 1:00pm	**Lunch Time (4th Floor, Continental Room)**				
	VIENNA ROOM	**DANUBE ROOM**	**THE HUTTE**	**BAVARIAN ROOM**	**SALZBURG ROOM**
1:00pm – 3:00pm	**VISION LICENSES** *Business, Pet, & B&O*	**VISION FINANCIALS** *Repeat*	**SOFTWARE DEMO'S** *Sign Up*	**VISION UTILITIES** *Repeat*	***VISION WORK ORDERS*** *ROUND TABLE*
	ALPINE ROOM (LOWER LEVEL)				
1:00pm – 2:00pm	**CUSTOMIZING YOUR VISION EXPERIENCE** *Presenter: William Jones*				
2:00pm – 3:00pm	**Vision IT - Managed Services & Maintenance** *Presenters: Brandon Votaw & Frank Votaw*				
	Break Time				
3:15pm – 4:15pm	**VISION SOFTWARE REVIEW** *Presenters: Pat Dieter & Chad Heaton*				
4:15pm – 4:45pm	**Vision Payroll New Employee Web Portal** *Presenter: Joe Sage*				
4:45pm – 5:00pm	**Post Conference Wrap Up**				
5:00pm – 6:00pm	**Miniature Golf Tournament** *Meet In The Lobby*				
6:00pm	**Dinner Break** *Enjoy dining in Downtown Leavenworth*				
7:30pm – 9:30pm	**Evening Reception** *Located at the Hutte, across from the Enzian*				

2014 Conference Agenda

THURSDAY, OCTOBER 9TH, 2014					
7:30am - 8:30am	**4TH FLOOR, CONTINENTAL BREAKFAST**				
	ALPINE ROOM (LOWER LEVEL)				
8:30am – 8:45am	**DAILY CONFERENCE OVERVIEW**				
8:45am – 9:45am	**INVOICE CLOUD** **ELECTRONIC BILL PRESENTMENT & PAYMENT** *Presenters: Carlyn Altheide & Ryan Burtenshaw*				
	Break Time				
	VIENNA ROOM	**DANUBE ROOM**	**BAVARIAN ROOM**	**ALPINE ROOM**	**SALZBURG ROOM**
10:00am – 12:00pm	**VISION FIXED ASSETS**	**VISION PAYROLL** *Payroll Processing*	**VISION REPORTING SERVICES** *Advanced*	**VISION UTILITIES** *Tract 2*	**VISION CEMETERY** *ROUND TABLE*
12:00pm – 1:00pm	**Lunch Time (4th Floor, Continental Room)**				
	VIENNA ROOM	**DANUBE ROOM**	**THE HUTTE**	**BAVARIAN ROOM**	**SALZBURG ROOM**
1:00pm – 3:00pm	**VISION PURCHASE ORDERS**	**VISION PAYROLL** *Repeat*	**SOFTWARE DEMO'S** *Sign Up*	**VISION UTILITIES** *Repeat*	**OREGON MUNICIPAL COURT** *ROUND TABLE*
	ALPINE ROOM				
1:00pm – 2:15pm	**MRSC** **WHAT WE DO AND WHAT IS CHANGING** *Presenter: Toni Nelson*				
2:15pm – 3:30pm	**BUDGET DEVELOPMENT** **DEVELOPING YOUR BUDGET PROJECTIONS** *Presenter: Toni Nelson*				
	Post Conference Wrap up				
3:30pm – 6:15pm	**ICICLE RIDGE WINERY TOUR** *Sign up at Registration, limo service provided – Meet in lobby* *Pick up times: 3:40 PM & 4:40 PM* **Sponsored by** InvoiceCloud				
6:45pm	**Dinner with Awards - 4TH FLOOR, CONTINENTAL ROOM**				
8:00pm – 10:00pm	**Evening Reception & Entertainment - 4TH FLOOR, DANUBE ROOM**				

2014 Conference Agenda

Vision 2013 Conference Version 7.0

	FRIDAY, OCTOBER 10TH, 2014				
7:30am - 8:30am	**4TH FLOOR, CONTINENTAL BREAKFAST**				
	ALPINE ROOM (LOWER LEVEL)				
8:30am – 8:45am	**Daily Conference Overview**				
8:45am – 9:45am	**NEXT UP IN 2015 - VISION PERMITS** **ROUND TABLE** PRESENTERS: CRAIG LODGARD & JOHN ENGEBRETSON				
	Break Time				
	VIENNA ROOM	**DANUBE ROOM**	**THE HUTTE**	**BAVARIAN ROOM**	**SALZBURG ROOM**
10:00am – 12:00pm	**CLICK ONCE UPGRADE STRATEGIES** *ROUND table*	**VISION CASH MANAGEMENT**	**SOFTWARE LABS** *Sign Up*	**VISION MOBILE** *See What's New*	**ONE2ONE WITH CRAIG & JOHN**
	ALPINE ROOM				
12:15pm – 12:45pm	**CLOSING CEREMONIES - PRIZES AWARDED**				
1:00pm – 2:00pm	**Lunch Time (4th Floor, Continental Room)**				
	Time To Go Home *Thanks For Attending, See You Next Year*				

VISION RECEIVABLES
New Product Presentation – Share tips & tricks with your peers and view a brief presentation of Vision Receivables.

VISION FINANCIALS
Architecture and Workflow – Out with the old in with the new, let us show you the new beginnings of your already easy process. Learn the new grids and Capabilities along with building a work flow for your reference. We will wrap it up with some common mistakes that are easy to resolve.

VISION UTILITIES
Aging, Delinquencies and Best Practices – In this class we will be discussing our aging process, delinquencies, manual Adjustments and my most common support issues.

Architecture and the Billing Process – In this class we will be reviewing our Utilities Billing architecture concepts, discussing Properties, Contacts and Accounts. Then we will be going through the steps of the regular billing process.

VISION FORMS & OUTSOURCING
Solutions – Join us for a presentation of what forms we can produce and learn more about our outsourcing solution.

VISION LICENSES
New Product Presentation – Discover all the features and functionalities of Vision Licenses. Options include Business and Pet Licenses as well as B&O Tax Reporting.

VISION WORK ORDERS
Round Table – You are invited to a **roundtable** discussion with Vision staff to share your Work Order requests and expertise.

VISION FIXED ASSETS
Round Table – How are we affected by cloud services from archiving to PC performances and services.

VISION CEMETERY
Round Table – You are invited to a **roundtable** discussion with Vision staff to share your Vision Cemetery expertise.

VISION PURCHASE ORDERS
New Product Presentation – Discover all the features and functionalities of Vision Purchase Orders. Available as an **Add-On** Module to Vision Financials.

VISION PAYROLL
Payroll Processing – Master the payroll process and learn how the architecture all comes together to create a flawless routine. Tying tables to components and all the way to the employee. Create a helpful step by step process to assist you in your day to day processing!

OREGON MUNICIPAL COURT
Round Table – You are invited to a roundtable discussion with Vision staff to share your Oregon Municipal Court Ideas.

CLICK ONCE UPGRADE STRATEGIES
Round Table – What is Click Once deployment and how can we improve implementation and publishing techniques.

VISION CASH MANAGEMENT
Receipts, Deposits, & Best Practices – From posting Budgetary Receipts to Utility Receipts, then managing all of that hard work you have done by managing each transaction in a deposit! Maybe you have made a mistake, let me show you the ease to fixing your once in a lifetime mistakes!

VISION MOBILE
New Upgrades – new upgrades to handhelds and what enhancements they offer.

VISION REPORTING SERVICES
Architecture and Workflow – You will be introduced to the best practices and step by step when designing reports to fully take advantage of the SSRS integration. Introduction to SQL Server Reporting Services (SSRS) training teaches attendees how to create, format, and manage SQL Server Reporting Services reports.

ONE2ONE WITH CRAIG AND JOHN
ASK MANAGEMENT- Sign up for individual sessions to discuss anything Vision. There will be five (5) slots available. Sign-up sheet at the registration table.

OPENING CEREMONIES & CONFERENCE OVERVIEW

Presenter: Mayor Cheri Farivar – Mayor Cheri Farivar will open the conference with a welcoming speech and provide additional information about what other events may be happening in Leavenworth during your stay.

VISION'S STATE OF THE UNION ADDRESS

Presenter: Craig Lodgard – Join us to discuss our companies successes of previous years and where we intend to go into the future.

CUSTOMIZING YOUR VISION EXPERIENCE

Presenter: William Jones – Join us in an overview of the functional highlights of some of the latest innovative tools that make up the Vision suite of software applications.

VISIONIT – MANAGED SERVICES AND MAINTENANCE

Presenters: Brandon Votaw and Frank Votaw – We will be introducing new additions to our Managed Services solutions and lead a discussion about Vision hardware maintenance offerings.

VISION SOFTWARE REVIEW

Presenters: Pat Dieter and Chad Heaton – Join us for a discussion about our current product line and new features that have been added this year.

VISION PAYROLL EMPLOYEE WEB PORTAL

Presenter: Joe Sage – Decentralizing the entry and maintenance of information for employees presents unique challenges. Let us show you how our new employee web portal can help.

INVOICE CLOUD

Presenters: Carlyn Altheide & Ryan Burtenshaw – Invoice Cloud is an online payment management system which fully integrates with your Vision software, giving your customers an easy and convenient way to pay online. Learn how your customers will be able to go paperless and view their bills online, make one-time payments, setup recurring automatic payments, receive email notifications when new bills are available, etc.

MRSC – WHAT WE DO AND WHAT IS CHANGING

Presenter: Toni Nelson – The face of MRSC is changing. Will discuss our new look, new service options and what's in the future.

DEVELOPING YOUR BUDGET PROJECTIONS

Presenter: Toni Nelson – How to utilize the tools available to draft, prepare and present preliminary budget projections.

NEXT UP IN 2015 - VISION PERMITS -ROUND TABLE

Presenters: Craig Lodgard & John Engebretson – There has been a lot of interest in the development of a new Permit module to add to our suite. Share your ideas and needs to ensure that we build our application tailored to your requirements.

** SOFTWARE LABS **

Bring Your Topics – Meet with the Vision Support team as they assist in more Hands on Training. This is your opportunity to work one on one.

** SOFTWARE DEMO'S IN THE HUTTE **

New Module Demonstrations – Individual demos of the new software modules are available in the Hutte, across from the Enzian. Sign-up sheets are located at the registration table.
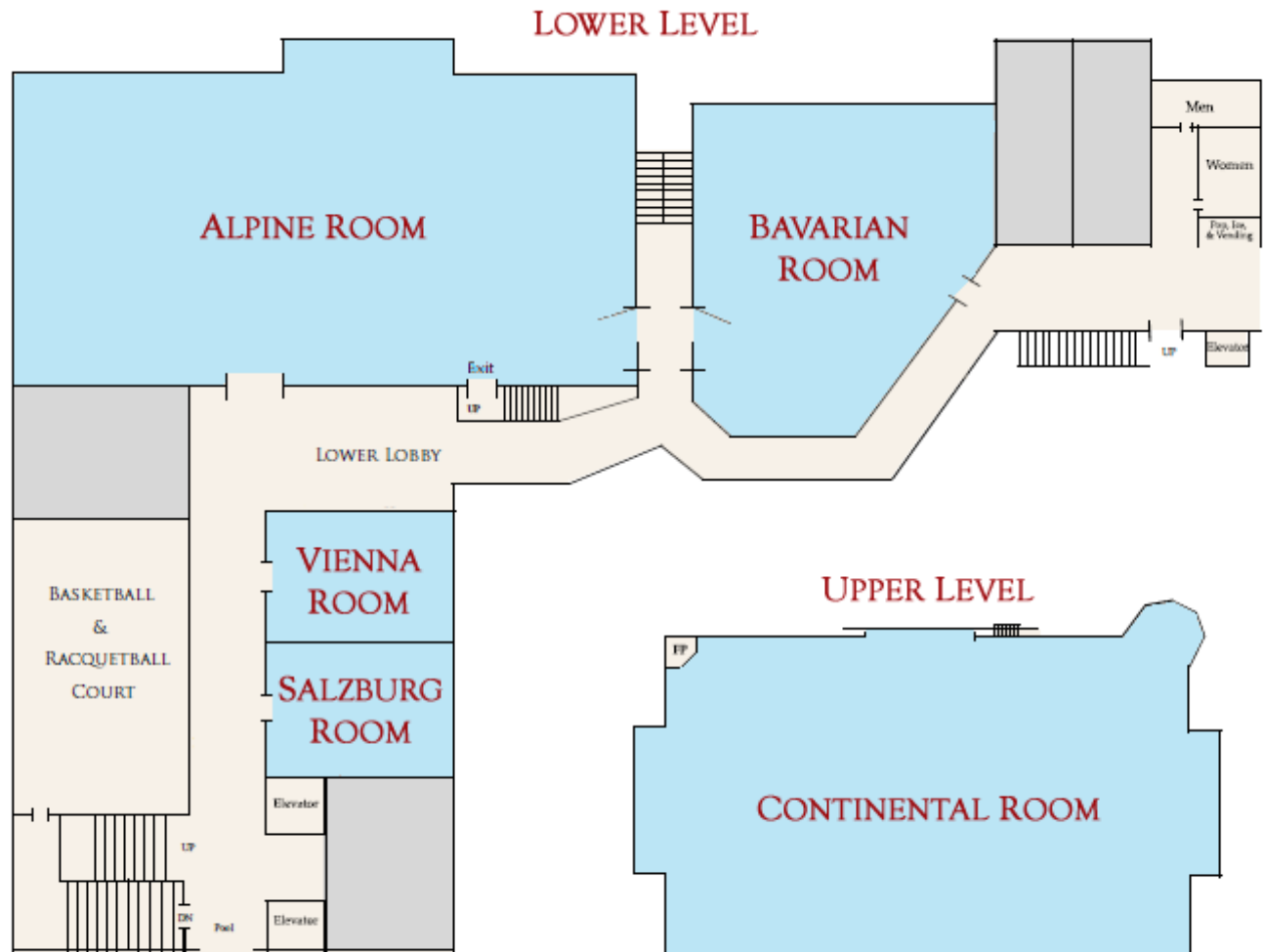
2014 Conference Agenda

Presenter Bios

Carlyn Altheide is the Western Regional Manager for Invoice Cloud. Carlyn currently lives in Walnut Creek, California and has a young son who is 16 months old and keeps her on her toes daily! Carlyn has been selling to utility and local government agencies for the past 10 years and her background includes experience with EBPP and Print & Mail Solutions.

Toni Nelson is the new Public Finance Consultant for Municipal Research and Services Center (MRSC), a private non-profit organization that supports local government in Washington through consultation, research, training, and collaboration. Previously, she was the Director of Professional Services for Vision Municipal Solutions a governmental software, hardware and financial services firm located in Spokane, Washington and the "Small Cities Specialist" with the Washington State Auditor's Office where she provided financial consulting services to local government.

Toni's background in governmental accounting is extensive with over twenty-four years in the public sector. She was with the Washington State Auditor's Office for 11 years and 9 years as the Clerk/Treasurer for the Town of Twisp.

Ms. Nelson established a focus for "Cash Basis" accounting and reporting while with the State Auditor's Office that carried into educational classes and on-site training. She authored the "Small Cities Manual", monthly articles for the Financial Advisory web group for MRSC and is a speaker for state organizations such as AWC, WFOA, WMCA, and WMTA on topics pertaining to budgeting, cash basis accounting and reporting and the application of Washington State B.A.R.S. requirements.

Michael Foley is the West Coast Sales Manager for Equus Computer Systems. Michael was born and raised in Renton, WA and currently lives in Maple Valley, WA. Michael has been married to his wife Nancy for 34 years, they have 2 children. Sean owns his own business in Maple Valley and Michelle is a Physical Therapist in Tacoma. He has been in the Computer PC business for 33 years and has been with Equus Computers for the past 13 years.

LOWER LEVEL

ALPINE ROOM

BAVARIAN ROOM

Men

Women

Pop, Ice, & Vending

Exit

UP

Elevator

UP

LOWER LOBBY

BASKETBALL & RACQUETBALL COURT

VIENNA ROOM

SALZBURG ROOM

Elevator

UP

DN

Pool

Elevator

UPPER LEVEL

FP

CONTINENTAL ROOM

Elevator

Women

Men

LOBBY

Elevator

Hall

DANUBE ROOM

FP

Solarium

Sun Deck
30x20

VENUE FLOORPLANS