2018 Annual QS/1 Government Tax, Finance, & Utility Conference

SCHEDULE AT-A-GLANCE

WEDNESDAY, Dec 5th	
9:00am – 10:00am	*Tax Customer Breakfast & Registration*
10:00am – 10:15am	Introductions
10:15am – 11:00am	Review Previous Service Packs
11:00am – 11:30am	Preview Future Service Packs
11:30am – 12:00pm	Future Development Discussion
12:00pm – 1:00pm	Tax Customer Lunch
12:30pm – 1:00pm	*Finance & Utility Customer Arrival Registration*
1:00pm – 1:20pm	Company Reorganization & Benefits
1:20pm – 1:40pm	Serving You: Client Services Outlook & Support Update
1:40pm – 2:00pm	Changes in the Development Process
2:00pm – 2:30pm	Roadmap To The Future
2:30pm – 4:00pm	Special Speaker – Industry Topic
6:00pm – 9:00pm	**Dinner Event in the Atrium**
THURSDAY, Dec 6th	
8:00am – 8:30am	Breakfast & Registration
8:30am – 9:00am	Preview Future Service Packs
9:00am – 9:30am	Future Development Discussion
9:30am – 10:30am	Utility – Review Previous Service Packs
	Finance – Review Previous Service Packs
10:30am – 10:45am	Refreshment Break
10:45am – 11:30am	Utility – Best Practices
	Finance – Best Practices
11:30am – 12:00pm	Utility – Utility Cloud
	Finance – Hospitality Tax
12:00pm – 1:00pm	Lunch
1:00pm – 2:30pm	Round Table Discussions
2:30pm – 2:45pm	Closing Remarks

Day 1: Tax Customers

Review Previous Service Packs
Audience: *All Tax Users*
Instructor(s): Josh Vickery, Product Analyst, Tax & Robin Landers, Product Manager

The purpose of this session will be to review the enhancements made to the Tax Management System over the previously released Service Packs.

Learning Objectives:

- Learn about the previous enhancements to tax management software
- Discuss how the features can help processes and functionality for day to day activities
- Friendly reminders to make updates easier for you

Preview Future Service Pack Enhancements
Audience: *All Tax Users*
Instructor(s): Josh Vickery, Product Analyst

The purpose of this session will be to preview future service pack enhancements to be made in the Tax Management System. We will discuss what features we have slated for future service packs during our sprint process.

Learning Objectives:

- Provide insight into what features and new functionality will be released in future service packs
- Deliver an understanding of the process that goes into prioritizing enhancements

Tax - Future Development Discussion
Audience: *All Tax Users*
Instructor(s): Robin Landers, Product Manager

During this session Robin will lead discussion about possible future enhancements. This is a great opportunity for tax customers to learn more about future enhancements. This the perfect time for customers to offer feedback to help guide the future of the tax software.

Learning Objectives:

- Discussion of potential future enhancements.
- Provide an opportunity for feedback about on how the changes are implemented.

Day 1: Tax, Finance, & Utility Customers

Company Reorganization & Benefits
Audience: *Tax, Finance, and Utility Billing Users*
Instructor(s): Robin Landers, Project Manager

This session is designed to inform you of the changes that have taken place within JM Smith and the Smith Technologies brands, and what it means for you. This will include updates on: corporate leadership changes, work flow strategies, client service model, and our brand into the future.

Learning Objectives

- Deliver an understanding of Smith Technologies
- Describe the creation and execution of the Centers of Excellence model
- Discuss the benefits of a family of brands structure and shared resources

Serving You: 2018 Client Services Outlook & Update

Audience: *Tax, Finance, and Utility Billing Users*
Instructor(s): Alex Mahan, Marketing Manager

This course will describe the various objectives the QS/1 Governmental team has set for themselves to better serve you. It will cover the framework to develop and maintain your loyalty which includes: Communication, increased knowledge, teamwork, and looking at service through the eyes of the customer.

Objectives:

- Define the QS/1 Governmental mission for Client Services
- Describe the pillars that define the framework to achieve success
- Provide an overview of the goals and objectives of Client Services
- Outline where the Client Services team is now and where we want to be

New Development Process

Audience: *Tax, Finance, and Utility Billing Users*
Instructor(s): Scott Hayes, Development Manager

This session will explain the new development procedures being followed by the Governmental Development teams. It will cover the flow of work items once they have been reported to development from prioritization to completion.

Learning Objectives:

- Understand the difference between Waterfall and Agile development methodologies.
- Identify the key components of Agile development.
- Explore the Agile development workflow.
- Learn what this means for the customer.

Roadmap To The Future

Audience: *Tax, Finance, and Utility Billing Users*
Instructor(s) - Alex Mahan, Marketing Manager

This session will recap all of the exciting 2018 changes and what it means to our commitment to you. It will cover the road map ahead and what's in it for you, your business, and your community. ***Stick around for an exciting announcement and free giveaways!***

Learning Objectives

- Recap the client services, development, and corporate changes
- Provide an overview of the road map ahead
- Discuss why this is important for you
- Announce some exciting news and giveaways!

Day 2: Finance & Utility Customers

Preview Future Service Packs
Audience: *Finance and Utility Billing Users*
Instructor(s): Amy Horne, Product Analyst II

This session will explain the upcoming enhancements for service pack 14 and 15. It will cover the new features in these service packs as well as the benefits of using these new features in your office.

Learning Objectives:
- Explore new features that are planned for future service packs
- Identify the benefit of implementing these new features in your office

Future Development Discussion
Audience: *Finance and Utility Billing Users*
Instructor(s): Robin Landers, Product Manager

During this session Robin will lead discussion about possible future enhancements. This is a great opportunity for finance customers to learn more about future enhancements. This the perfect time for customers to offer feedback to help guide the future of the finance software.

Learning Objectives:
- Discussion of the possible future enhancements.
- Provide an opportunity for feedback about on how the changes are implemented.

Utility Billing – Service Pack Review
Audience: *Utility Billing Users*
Instructor(s): Jim Mitchell, Sales Manager

This session will explain the enhancements made to the Utility Billing application in service pack 11, 12, and 13. During this session we will provide an explanation of functionality and benefits of the improvements made in each service pack.

Learning Objectives:
- Review of the major enhancements of each service.
- Provide an overview of how to import groups of meters that have been replaced.
- Discuss the benefits of the interface to Utility Cloud.

Finance – Service Pack Review
Audience: Finance Users
Instructor(s): Amy Horne, Product Analyst II

This session will explore in depth, the enhancements implemented in service pack 11, 12, and 13. It will cover the new features introduced in these service packs as well as the benefits of using these new features in your office.

Learning Objectives:
- Understand the new features added in service pack 11, 12, 13.
- Identify benefits of implementing this functionality in your office

- Learn how to implement these new features in the finance applications.

Utility Billing – Best Practices
Audience: Utility Billing Users
Instructor(s): Jim Mitchell, Sales Manager – Smith Technologies

This session will provide a more detailed discussion about the ability to email bills/notifications. We will also provide in a detailed look into the Adjustment screen enhancements and increased functionality. In addition, we will take closer look into how to run and use the information provided in the Bill Balance Register.

Best Practice Topics – Utility Billing:
- Email Bills/Notifications – 10 Minutes
- Deduct Meters Setup – 10 Minutes
- Adjustment Screen Code Setup – 10 Minutes
- Billing Balance Register Report/Balancing – 15 Minutes

Learning Objectives:
- Take a closer look in specific functions within the Utility Billing application.
- Discuss the process of emailing notifications to customers.

Finance – Best Practices
Audience: Finance Users
Instructor(s): Amy Horne, Product Analyst II – Smith Technologies

This session will take a concentrated look at key features in the finance applications that will assist users in using the applications to their full potential. It will cover step by step views of each feature to outline the importance of each process.

Best Practice Topics – Finance:
- Hospitality Tax – 10 minutes
- Purchase Order Processing – 10 Minutes
- Void Transaction – 10 Minutes
- Payroll Budgeting – 15 Minutes

Learning Objectives:
- Understand the payroll budgeting process and how it forecasts payroll changes in the yearly budget planning process.
- Understand the void transaction process in the Accounting Suite.
- Identify steps in purchase order process.
- Identify the impact of implementing these best practices in your work flow.

Utility Cloud
Audience: Utility Billing Users
Instructor(s): Brad Powers, General Manager – Blue Ridge Rural Water

This session will provide a look into how the implementation of Utility Cloud has benefited the water district. Brad will also discuss the benefits of the interface with the Utility Billing program. He will also discuss how it continuing to evolve today and into the future.

Learning Objectives:
- To take a look at how the utility district uses Utility Cloud today.
- Discuss how the Utility Cloud interface helps to provide better information to the field staff.

Finance – Hospitality Tax
Audience: Finance Users
Instructor: Amy Horne, Product Analyst II – Smith Technologies

This session will explain the new recurring tax payment feature in the Business License/Occupational Tax application. It will cover the setup and implementation process.

Learning Objectives:
- Understand recurring tax payment codes and how to associate rate codes for payment calculation.
- Explore penalty and interest expansion.
- Identify reports to show payment or delinquent information.
- Define year end procedures.

Round Table Discussions
Audience: Finance & Utility Users
Instructor(s): All QS/1 Staff, Dependent on Topic

These sessions are set up in small round tables with open-ended topics available, or you can propose your own topics of discussion. This is a time to speak freely, ask questions, give feedback, and network with peers and discuss issues affecting your industry.