

KARMAK[®]

Technology Conference & Expo 2008
October 14-17, 2008



Navigating Technology

St. Louis, Missouri

Navigating Technology

Get onboard as we navigate through the latest technology and techniques that will chart your course to success. Take a tour of new software and hardware solutions from Karmak that will help your company perform more efficiently—and more profitably. With opportunities to network with industry leaders and practical training from our heavy-duty specialists, this event is sure to keep you moving in the right direction.

More Reasons to Attend

- Choose from more than 65 new and updated classes.
- Meet and greet your technology partners and peers.
- Stay up-to-date on Karmak's development plans and progress.
- Preview upcoming releases including the latest mobile technologies.
- Find out what's new in ProfitMaster® and learn how to prepare for the transition.
- Receive one-on-one guidance on powerful reporting tools and system features.
- Tailor our convenient new four-day program to fit your schedule.
- Learn new tips and shortcuts with in-depth sessions for every department.
- Find out how you can "go green" with paperless archiving of your Karmak documents.
- See how dashboards of real-time information can improve efficiency throughout your company.
- Discover the latest options for protecting sensitive data and preventing system downtime.
- Participate in new product roundtable discussions.

Registration

Our flexible new format and varied class schedule make it easy to select a program to suit your needs. Your registration fee of \$800 lets you attend all Conference activities from Tuesday through Friday:

- All Conference Classes
- Welcome Reception
- One-on-One Appointments
- Karmak Today Presentation
- OEM Breakouts
- Product Demo Room & Internet Kafé
- Meet & Greet Social Hour
- All Conference Meals

The Karmak Technology Conference & Expo 2008 is coming soon. Please make note of the registration and room reservation deadlines and reserve your space today.

Conference Registration Deadline—September 12, 2008. Call us at 800-622-6311 (Legend) or 800-865-8991 (INFO 5), or visit www.karmak.com to register or for additional details.

Accommodations

Join us at the Hilton St. Louis at the Ballpark Hotel for spectacular city views and well appointed accommodations. Our venue this year features the beautiful new Arch View Ballroom and Conference Center, and is just steps away from Busch Stadium and other popular downtown attractions.

Room Reservation Deadline—Contact the Hilton St. Louis at the Ballpark Hotel directly at 314-421-1776 **before September 12, 2008** for the discounted rate. Visit the hotel website at www.hiltonstlouis.com for more information.

We cannot guarantee room availability and pricing after September 12, 2008.

Conference Events

Karmak Today

Presentation with Bill Healy, President/CEO

Wednesday — 1:00-2:00 p.m.

Many exciting developments have occurred since last year's conference. Karmak President/CEO Bill Healy will touch on topics that are of interest to all. In the technology portion of the presentation, software updates and requested enhancements and changes will be covered, as well as long-standing features that you may have overlooked. These technology topics include exciting new mobile applications that will simplify your parts and service jobs; a new resource scheduling module; the ability for you to instantly notify your customers of parts and service completions with Client Talk; the new Truck Specifications interface for ProfitMaster which lets you pull vehicle information directly from the manufacturer; an impressive array of chart and graph display options for RPM; and the new password-protection security feature and the ability to capture invoices with our state-of-the-art KOLD software.

In addition to the technology overview, a focus will be put on services, customer feedback, and new approaches to more effectively bring information to you. We've been listening, and because of responses we've received, topics such as customer committees and survey results will be discussed. Our emphasis on providing as much information as possible has led to the creation of quick reference guides, process flow documents and corresponding process flow charts for ProfitMaster modules, with tutorials scheduled to follow. Other customer-centered services that will be highlighted are Customer Confidential and Help Desk Live—two products designed to provide the information you need when you need it. In addition, information regarding the successful implementation of the Sales Management Steering Committee and the progress we've made will be presented.

Don't miss this comprehensive company overview designed to keep you up-to-date.

OEM Breakouts

Wednesday — 2:15-3:15 p.m. & 3:15-4:15 p.m.

This conference provides you the opportunity to meet with several Original Equipment Manufacturers at one convenient location. Discuss specific issues with knowledgeable representatives and learn first-hand what they are doing to enhance dealer relationships.

Product Demo Room

Tuesday starting at 1:00 p.m. through Friday at Noon

Stop by the Product Demo Room for a personal demonstration of the latest software tools and technology from Karmak. Take a break with complimentary snacks, or catch up on e-mail at our free Internet Kafé. Karmak Sales staff will be available to answer your questions and demonstrate all Karmak products. In addition, you may meet with representatives from leading technology vendors to discuss currently available products and services.

One-on-Ones

Tuesday starting at 1:00 p.m. through Friday at Noon

Talk one-on-one with Karmak experts at our hands-on help desk sessions. It's your chance to bring your questions and gain a better understanding of your system as it relates to your particular business needs. Get the specific advice you need to take back to your company to resolve issues or improve procedures.

This year, we are offering special sessions on valuable reporting programs in addition to other business system topics. These popular sessions are available by appointment only and fill up quickly. Be sure to sign up to discuss your choice of the following topics. See the Conference Schedule at a Glance for available times.

- Accounting
- Parts & Service
- Systems & Vendor Communications
- ProfitMaster Sales Management
- ProfitMaster Report Generator
- Real-time Performance Monitor (RPM)
- Legend Custom Financial Report Writer
- INFO 5® Query

Social Events

Tuesday 6:30-7:30 p.m. & Wednesday 6:00-7:00 p.m.

Be our guest for energizing social gatherings where you can network with the Karmak team and other Karmak customers in a fun and relaxing atmosphere.

The festivities begin Tuesday evening with our Welcome Reception. Join us for hot hors d'oeuvres, cool cocktails, and friendly conversation. Our Wednesday night Meet & Greet Social Hour offers an additional opportunity to mix, mingle, and unwind with refreshing appetizers and beverages. We look forward to seeing you there!



Conference Schedule at a Glance

Tuesday, October 14

Conference Registration — 10:00 a.m.-6:30 p.m.

<i>One-on-Ones</i>	<i>Product Demo Room</i>
1:00 - 5:00 p.m.	1:00 - 6:30 p.m.

Welcome Reception — 6:30-7:30 p.m.

Wednesday, October 15

Breakfast — 7:30-8:30 a.m.

<i>Class Sessions</i>	<i>One-on-Ones</i>	<i>Product Demo Room</i>
8:30-11:30 a.m.	8:30-11:30 a.m.	8:30-11:30 a.m.

Lunch — 11:30 a.m.-1:00 p.m.

Karmak Today with Bill Healy, President/CEO — 1:00-2:00 p.m.

<i>OEM Breakout Session 1</i>	<i>One-on-Ones</i>	<i>Product Demo Room</i>
2:15-3:15 p.m.	2:15-5:30 p.m.	2:15-5:30 p.m.
<i>OEM Breakout Session 2</i>		
3:15-4:15 p.m.		
<i>Class Sessions</i>		
4:15-5:45 p.m.		

Meet & Greet Social Hour — 6:00-7:00 p.m.

Thursday, October 16

Breakfast — 7:30-8:30 a.m.

<i>Class Sessions</i>	<i>One-on-Ones</i>	<i>Product Demo Room</i>
8:30-11:30 a.m.	8:30-11:30 a.m.	8:30-11:30 a.m.

Lunch — 11:30 a.m.-1:00 p.m.

<i>Class Sessions</i>	<i>One-on-Ones</i>	<i>Product Demo Room</i>
1:00-5:15 p.m.	1:00-5:15 p.m.	1:00-5:30 p.m.

Friday, October 17

Breakfast — 7:30-8:30 a.m.

<i>Class Sessions</i>	<i>One-on-Ones</i>	<i>Product Demo Room</i>
8:30 a.m.- Noon	8:30 a.m.- Noon	8:30 a.m.-Noon



Legend Class Schedule

Wednesday, October 15

Legend Classes		ProfitMaster & Combined Classes			
Labor Reconciliation 8:30-10:00 a.m.	Price Updates & On-Line Pricing 8:30-10:00 a.m.	Synchronizing ProfitMaster with Legend 8:30-10:00 a.m.	Real-time Performance Monitor (RPM) Overview 8:30-10:00 a.m.	Sales Management "Did You Know?" 8:30-10:00 a.m.	New Technology Overview 8:30-10:00 a.m.
Custom Financial Report Writer 10:15-11:30 a.m.	Price File "Did You Know?" 10:15-11:30 a.m.	Legend Classes KOLD (Karmak OnLine Documents) 10:15-11:30 a.m.	Mobile Parts Order Entry 10:15-11:30 a.m.	Sales Management Floor Plan 10:15-11:30 a.m.	
Request History Detail (AR472A) 4:15-5:30 p.m.	Special Pricing & Contract Pricing 4:15-5:45 p.m.	Legend Access 4:15-5:30 p.m.	Legend Class Systems "Did You Know?" 4:15-5:45 p.m.	Sales Management Update & Roundtable 4:15-5:45 p.m.	ProfitMaster Service Labor Entry & Reporting 4:15-5:45 p.m.

Thursday, October 16

Legend Classes		ProfitMaster & Combined Classes			
General Ledger Posting Flow 8:30-10:00 a.m.	Purchasing Theory 8:30-10:00 a.m.	Legend Service "Did You Know?" 8:30-10:00 a.m.	Sales Management Salesman Commission 8:30-10:00 a.m.	Mobile Repair Order Entry & Mobile Service Writer 8:30-10:00 a.m.	ProfitMaster Printing 8:30-10:00 a.m.
Legend Accounting "Did You Know?" 10:15-11:30 a.m.	Purchasing Process 10:15-11:30 a.m.	Legend Inventory "Did You Know?" 10:15-11:30 a.m.	ProfitMaster Report Generator 10:15-11:30 a.m.	Client Talk for Legend & INFO 5 10:15-11:30 a.m.	KOLD for ProfitMaster 10:15-11:30 a.m.
Quantity Adjustments & Average Cost 1:00-3:00 p.m.	Multiple-Branch Purchasing 1:00-3:00 p.m.	Time Entry Management & Labor Reconciliation 1:00-3:00 p.m.	Sales Management 2.0 Enhancements 1:00-3:00 p.m.	New Technology Overview 1:00-3:00 p.m. <i>Repeat</i>	ProfitMaster Service Management Repair Order Overview 1:00-3:00 p.m.
Daily Bookkeeping, Nitely & Eve Reports 3:15-5:15 p.m.	Parts Transaction File: Not Just for Changed Quantities 3:15-5:15 p.m.	Warranty Processing 3:15-5:15 p.m.	Sales Management Deal Processing 3:15-5:15 p.m.	Network Security 3:15-5:15 p.m.	ProfitMaster Service Management Roundtable 3:15-5:15 p.m.

Friday, October 17

Legend Classes		ProfitMaster & Combined Classes			
Credit Limit Management 8:30-10:00 a.m.	Parts Manager Checklist 8:30-10:00 a.m.	Service Manager Checklist 8:30-10:00 a.m.	Sales Management Deal Forms Processing 8:30-10:00 a.m.	RPM "Did You Know?" & Advanced Topics 8:30-10:00 a.m.	Getting Ready for ProfitMaster Service Management 8:30-10:00 a.m.
Inventory Reconciliation 10:00 a.m.-Noon	Cycle Counting & Physical Inventory 10:00 a.m.-Noon	Effective Core Management 10:00 a.m.-Noon	Legend Class Accounts Receivable Month End 10:00 a.m.-Noon	Preparing for ProfitMaster 10:00 a.m.-Noon	ProfitMaster Service Management Preventive Maintenance 10:00 a.m.-Noon

INFO 5 Class Schedule

Wednesday, October 15

INFO 5 Classes		ProfitMaster & Combined Classes		
Customer Pricing 8:30-10:00 a.m.	INFO 5 Data Cleanup/ Moving KOLD to CD 8:30-10:00 a.m.	Real-time Performance Monitor (RPM) Overview 8:30-10:00 a.m.	Sales Management "Did You Know?" 8:30-10:00 a.m.	New Technology Overview 8:30-10:00 a.m.
Price File Updates 10:15-11:30 a.m.	INFO 5 Service "Did You Know?" 10:15-11:30 a.m.	Synchronizing ProfitMaster with INFO 5 10:15-11:30 a.m.	Mobile Parts Order Entry 10:15-11:30 a.m.	Sales Management Floor Plan 10:15-11:30 a.m.
Inventory Reconciliation 4:15-5:30 p.m.	KOLD for INFO 5 4:15-5:45 p.m.	Sales Management Update & Roundtable 4:15-5:45 p.m.		ProfitMaster Service Labor Entry & Reporting 4:15-5:45 p.m.

Thursday, October 16

INFO 5 Classes		ProfitMaster & Combined Classes		
INFO 5 Accounting "Did You Know?" 8:30-10:00 a.m.	DOC Report: Making It Work for You 8:30-10:00 a.m.	Sales Management Salesman Commission 8:30-10:00 a.m.	Mobile Repair Order Entry & Mobile Service Writer 8:30-10:00 a.m.	ProfitMaster Printing 8:30-10:00 a.m.
Query: How Can It Benefit My Dealership? 10:15-11:30 a.m.	iSeries/INFO 5 "Did You Know?" 10:15-11:30 a.m.	ProfitMaster Report Generator 10:15-11:30 a.m.	Client Talk for Legend & INFO 5 10:15-11:30 a.m.	KOLD for ProfitMaster 10:15-11:30 a.m.
Data Migration from INFO 5 to Excel 1:00-4:00 p.m.	Miscellaneous Purchase Orders 1:00-3:00 p.m.	Sales Management 2.0 Enhancements 1:00-3:00 p.m.	New Technology Overview 1:00-3:00 p.m. <i>Repeat</i>	ProfitMaster Service Management Repair Order Overview 1:00-3:00 p.m.
	INFO 5 Parts "Did You Know?" 3:15-4:45 p.m.	Sales Management Deal Processing 3:15-5:15 p.m.	Network Security 3:15-5:15 p.m.	ProfitMaster Service Management Roundtable 3:15-5:15 p.m.

Friday, October 17

INFO 5 Classes		ProfitMaster & Combined Classes		
iSeries Backup: Data Protection Levels 8:30-10:00 a.m.	Data Migration from INFO 5 to Excel 8:30-11:30 a.m. <i>Repeat</i>	Sales Management Deal Forms Processing 8:30-10:00 a.m.	RPM "Did You Know?" & Advanced Topics 8:30-10:00 a.m.	Getting Ready for ProfitMaster Service Management 8:30-10:00 a.m.
KOLD for INFO 5 10:00 a.m.-Noon <i>Repeat</i>		Preparing for ProfitMaster 10:00 a.m.-Noon	ProfitMaster Service Management Preventive Maintenance 10:00 a.m.-Noon	

INFO 5 Classes

Accounting

INFO 5 Accounting “Did You Know?”

This class will introduce you to INFO 5 Accounting procedures in G/L, A/R, and A/P areas that will eliminate time-consuming steps. We will also share tips on menu options not frequently used as well as helpful hints and undocumented features.

For: Dealer Principals, General Managers, Controllers, Department Managers, Service Writers, Inventory Control Personnel, Purchasing Agents

Parts & Service

Customer Pricing

If you have ever wondered if you're taking advantage of all that INFO 5 has to offer in customer pricing, this class is for you. We will explain customer pricing from A to Z with practical examples. Join us for such topics as discount pricing, matrix pricing, velocity pricing, group pricing, and of course, specials pricing.

For: Dealer Principals, General Managers, Parts Managers, Controllers, Pricing Personnel

INFO 5 Parts “Did You Know?”

Eliminate time-consuming steps and increase productivity on your INFO 5 business system through new tips, little known techniques, and undocumented shortcuts. Discover our secrets and shortcuts to improve your efficiency in INFO 5 Parts programs.

For: Parts Managers, Counter and Receiving Personnel, and anyone wanting to learn more about the Parts system

INFO 5 Service “Did You Know?”

We'll show you our secrets and shortcuts that will help improve your efficiency in INFO 5 Service programs. Eliminate time-consuming steps and increase productivity in the service department through new tips, little known techniques, and undocumented shortcuts.

For: Service Managers, Service Writers, Service Clerks, and anyone wanting to know more about the Service system

Inventory Reconciliation

This class will help you to understand the importance of reconciling inventory, complete a daily physical inventory reconciliation report, determine what causes out-of-balances, and take the appropriate action to either fix or avoid an out-of-balance condition.

For: Controllers, Accounting Managers, General Managers, Inventory Control Managers, Parts Managers, Office Managers

Miscellaneous Purchase Orders

Learn how to set up, create, and process miscellaneous purchase orders. We will look at the use of miscellaneous purchase orders from within counter tickets and work orders.

For: Parts Managers, Service and Parts Counter Personnel, Inventory Administrators

Price File Updates

Now it's easier and more seamless to update your price files. Learn how our Electronic Price Download allows you to automatically update your pricing information without the hassle of requesting and loading tapes or CDs, and how our price tape catalog helps you change prices quickly and accurately. Learn to update a variety of fields, request price updates, and load the rules for requesting a price update. We'll discuss how others have taken full advantage of the information supplied by vendors to increase profitability.

For: General Managers, Parts Managers, Pricing Personnel

Company-Wide

Data Migration from INFO 5 to Excel

This course will give you a basic understanding of ODBC setup and usage, which allows you to migrate data from your INFO 5 software into Microsoft Excel®, and then use this data to populate spreadsheets and charts with real-time results—as the data changes so can your spreadsheet. We'll show you practical examples that you can take back and develop with your own data.

For: Anyone interested in taking their reporting to the next level

DOC Report: Making It Work for You

This class will show examples of how the Daily Operating Control (DOC) report will allow you to monitor the activity of your dealership on a daily basis. We will then review steps for customizing your DOC report.

For: Dealer Principals, Controllers, Department Managers

KOLD (Karmak OnLine Documents) for INFO 5

Going green? Go to KOLD. KOLD will save paper, printer resources, valuable storage space, and the environment. This class will assist KOLD administrators in understanding KOLD implementation, administration, and troubleshooting, as well as provide a brief overview of the product for individuals who are not familiar with KOLD.

For: Anyone wanting to know more about KOLD

Query: How Can It Benefit My Dealership?

This class will show you how Query can be used to create custom reports using the files within the INFO 5 system. Learn the basic skills needed to create and edit simple one-file queries, as well as an understanding of the Data Dictionary in FIDO.

One-on-one sessions on Query are available on Thursday afternoon and Friday morning. Sign up for personal attention to your questions.

For: Managers and anyone else wanting a better understanding of Query

Systems

iSeries/INFO 5 “Did You Know?”

Learn little known tips and techniques for maintaining your iSeries. We will cover commands for working with system problems, spool files, and current jobs that are active on the system, plus additional tips that will help you save time and improve systems procedures.

For: IT Personnel, Dealer Principals, Controllers, and anyone who maintains the AS400

iSeries System Backup: Data Protection Levels

How effective are your procedures for protecting your data? This class will cover the different levels of backing up your INFO 5 data, starting with the minimum suggested nightly backups to the data redundancy offered by High Availability and Disaster Recovery software packages. We will examine options for nightly backup processes and procedures. Come to find out what options are out there for keeping your data safe and minimizing your system down time.

For: System Administrators

INFO 5 Data Cleanup/Moving KOLD to CD

Is your iSeries disk space getting low and in need of some cleanup? Want to have an off-site copy of your KOLD documents? Attend this class to learn how to move KOLD data from the iSeries to your local PC or network file server. This will not only relieve space but allow you to put the KOLD documents on a CD/DVD to be taken off site. You will also learn other procedures for determining what is taking up all your disk space.

For: System Administrators



ProfitMaster & Combined Classes

Company-Wide

KOLD (Karmak OnLine Documents) for ProfitMaster

Paperless is the way to go these days. Take a look at KOLD and see how easy it is to keep track of your ProfitMaster documents online. You will learn how documents can be automatically sent to KOLD or be archived. Users' access privileges in KOLD are the same as those in ProfitMaster, so there are no permissions to set. We will demonstrate how to navigate, retrieve, view, and organize your documents in KOLD. This is a great overview for those who are familiar with KOLD as well as anyone interested in taking a first look.

For: All ProfitMaster users

New Technology Overview

See our latest products and learn what they can do for you. We'll introduce you to Client Talk, which notifies your customers when key business activities occur, Tablet PC-compatible Mobile Service Writer and Mobile Parts Order Entry modules, as well as a new resource scheduling module, KOLD enhancements, Signature Capture, and Truck Specs.

For: All Karmak Legend® and INFO 5 business system users

Preparing for ProfitMaster

Our growing line of ProfitMaster products offers many new and advanced features to assist your entire organization, and setting expectations before going in can make the transition easier for everyone. Join us to learn what to expect and how to best prepare for the move to ProfitMaster, including current and upcoming modules.

For: All Karmak Legend and INFO 5 business system users

ProfitMaster Report Generator

Learn how to build and run custom reports in the ProfitMaster database, and use Crystal Reports® Advanced Designer mode to further customize and save these custom reports for easy tree-view access. Also learn to modify standard ProfitMaster reports to meet your needs.

One-on-One sessions on ProfitMaster Report Generator are available after the class on Thursday afternoon. Be sure to sign up to reserve your space.

For: All ProfitMaster users

ProfitMaster Printing

Printing reports and forms can sometimes be a daunting experience in your daily routine. In this session, we will discuss the changes and capabilities for report and forms processing in ProfitMaster 2.0, examine setup requirements and options, cover the basics of form and report printing, and offer some shortcuts to help save time when printing reports and forms.

For: All ProfitMaster users

Real-time Performance Monitor (RPM) Overview

See what's new in RPM, our browser-based dashboard of real-time information from your Karmak system. This session provides an overview of our current modules: Lease and Rental, Customer Sales Watch, Service, Parts, Accounting, and Sales Management. We'll also introduce the new ProfitMaster Service module, including our newest components: Repair Order Details, Technician Detailed Time Transactions, and Technician Productivity. User defined fields, groups, and other new features in the latest RPM version will be demonstrated as well.

RPM One-on-One sessions are available on Wednesday afternoon and Friday morning. Sign up for a personal appointment.

For: Service Managers, Service Writers, Parts Managers, General Managers, Controllers, Leasing Managers, Sales Managers, Sales Administrators

RPM "Did You Know?" & Advanced Topics

Explore advanced options in RPM views and setup that can help you locate and present key data from your Karmak business system more quickly and completely. See examples of views that incorporate RPM features that will improve the usefulness of the product.

One-on-One sessions on RPM are available Wednesday afternoon and Friday morning. Reserve your space to discuss your questions with an RPM specialist.

For: Service Managers, Service Writers, Parts Managers, General Managers, Controllers, Leasing Managers, Sales Managers, Sales Administrators

Synchronizing ProfitMaster with INFO 5

Have you ever wondered how ProfitMaster and INFO 5 determine what data to pass between databases when adding or modifying records in either platform? We will examine the program and associated tables that maintain and determine the synchronized relationship between the two databases for your ProfitMaster and INFO 5 customer, vendor, general ledger, and equipment files. Discussion will include the evolution and maintenance of the associated tables, as well as basic troubleshooting techniques and corrections to errors generated in daily processing. Come and unlock the details of the behind-the-scenes data synchronization in your current ProfitMaster environment.

For: All ProfitMaster/INFO 5 users

Synchronizing ProfitMaster with Legend

This course examines the synchronized relationship between ProfitMaster-based customers, vendors, and general ledger records, and their equivalent counterparts on the Legend business system. Course material will also include discussion and review of relevant interface files that facilitate the synchronization process.

For: All ProfitMaster/Legend users

Parts

Mobile Parts Order Entry

Preview our new application that lets you enter a parts order from any location via a portable PC. The software is ideally suited for outside sales personnel who spend time away from the office, but return regularly to enter orders into the system. We'll discuss options for generating an order confirmation, capturing the client's signature in the field, and sending data to the business system and storing it in KOLD.

For: General Managers, Parts Managers, Parts Personnel

Parts & Service

Client Talk for Karmak Legend & INFO 5

Learn how your company can benefit from Client Talk to save time and improve communications with your customers. Client Talk sends e-mail notification to your customers when unit repair is completed and/or counter ticket parts backorders are fulfilled. Client Talk is easy to use, requires no hardware investment, and minimal time commitment from frontline employees. We will also review how Client Talk works and demonstrate Client Talk setup and administration for Legend and INFO 5.

For: Anyone wanting to know more about Client Talk

Service

Getting Ready for ProfitMaster Service Management

Our second major ProfitMaster release is coming soon. We'll guide you through the changes and decisions you can make now for easier migration to ProfitMaster Service Management. Learn how to handle unit consistencies, repair types, and job codes for a smoother transition.

For: Service Managers, Service Writers, General Managers

Mobile Repair Order Entry & Mobile Service Writer

Preview our new tools that will mobilize your service team. Mobile Repair Order Entry lets you easily track roadside repairs, maintenance at fleet locations, and any service performed off-site. You can quickly open repair orders on a portable PC, and track inventory of mobile service trucks. Mobile Service Writer gives service writers the freedom to open repair orders on a Tablet PC as vehicles arrive on site. We'll cover features and benefits including generating a work order or invoice, capturing the client's signature, sending data to the business system, and storing data in KOLD.

For: Service Managers, Service Writers, General Managers

ProfitMaster Service Labor Entry & Reporting

Take a look at the many programs within Service Management that allow you to enter and track labor in your service shop. You'll find new ways to keep the fast pace of the shop moving forward. Also preview the numerous reports available that give detailed information about labor in the shop, including productivity reports as well as technician time reports.

For: Service Managers, Service Writers, General Managers

ProfitMaster Service Management Roundtable

We want to hear from you! This roundtable session is your opportunity to give us input on all aspects of Service Management—what's working well for you and what's not, what's missing or needs to be changed. We value your contribution toward improving current and future Service Management releases.

For: All Service Management users

ProfitMaster Service Preventive Maintenance

Preventive maintenance offers a means to track and notify recurring services to be performed on a unit. We will discuss and demonstrate these capabilities in creating the PM schedules as well as the implementation of those schedules including notification through reporting.

For: Service Managers, Service Writers, General Managers

ProfitMaster Service Repair Order Overview

This class will introduce you to the repair order process from creating a new repair order through invoicing. We will cover each step in the process in detail to learn what differences and similarities exist between the current business system process flow and ProfitMaster. Attend this class for a better understanding of the undertaking and functional benefits inherent in ProfitMaster Service Management.

For: Service Managers, Service Writers, General Managers

Systems

Network Security

How do you secure your network against hackers, worms, trojans, viruses, or malicious code? Changes in the method and delivery of attacks have emphasized the need for enhanced detection and prevention capabilities of the firewall protecting your network. In this session, we will take an in-depth look at Intrusion Prevention Service, anti-virus, content filtering, spy ware, and Internet connectivity options, all of which will help you protect your network and your business.

For: Dealer Principals, Owners/Presidents, General Managers, System Managers, IT Managers and Technicians

Sales Management

Sales Management 2.0 Enhancements

Based on your feedback, we've made many enhancements to the latest version of ProfitMaster Sales Management. Learn about the changes in Version 2.0 that add increased flexibility in handling FET calculations, Deal, Unit, and Customer Maintenance, Commission Accounting, Local Purchase Orders, and more.

For: General Managers, Accounting Managers, Sales Administrators, Sales Managers

Sales Management Deal Processing

Process deals more efficiently with Sales Management's unique features. Learn to create and maintain a deal, including trade-ins, add-ons, FET, sales tax, and financing. Cover the steps to maintain sales worksheets and deal packets, as well as accounting review and commissions.

For: General Managers, Accounting Managers, Sales Administrators, Sales Managers

Sales Management Deal Forms Processing

Learn to process municipality, state, OEM, and internal deal forms for smoother sales transactions. We'll cover available documents, deal form field controls, automatic and manual form selection, form field entry, and deal packet forms processing procedures.

For: General Managers, Accounting Managers, Sales Administrators, Sales Managers

Sales Management "Did You Know?"

ProfitMaster Sales Management contains many features that streamline sales maintenance and processing procedures. Join us to learn little known tips and easy step-by-step instructions to help you use the system more efficiently.

For: All Sales Management users

Sales Management Floor Plan

Sales Management simplifies floor plan procedures by tracking lenders, plans, and fees. We'll cover floor plan reconciliation, including tracking flooring expense by unit and allowing posting to the General Ledger, how to set up and maintain floor plan lenders and floor units, and how to maintain and post flooring worksheets, as well as the latest enhancements and fixes.

For: General Managers, Accounting Managers, Sales Administrators, Sales Managers

Sales Management Salesman Commission

Unit salesperson commissions have been overhauled in Sales Management. Learn about the new features that let you calculate commissions within the system, the new tiered commission, and commission reports.

For: All Sales Management users

Sales Management Update & Roundtable

We have made significant changes and improvements to Sales Management since the 2007 Conference. We would like to discuss these changes and hear what your thoughts are. We will also have members of the Sales Management Steering Committee on hand to discuss their experiences and opinions of the process and advances. This session is your opportunity to give us input on all aspects of Sales Management. We value your contribution toward improving current and future Sales Management releases.

For: All Sales Management users



Legend Classes

Accounting

Accounts Receivable Month End

This class will provide you with a timetable of A/R tasks that should be performed daily, on a particular day of the month, weekly, and at month end. We will also cover month-end reports and reconciliation of specific groups of general ledger accounts for more efficient month-end procedures.

For: Controllers, Office Managers, Credit & Collections Managers, Accounts Receivable Personnel, Bookkeepers

Credit Limit Management

Are slow paying customers hurting your business? Need a better way to monitor and control credit limits? You have options designed to help. We'll explore the setup options to handle credit limits and the reports that can be generated to help control them.

For: Controllers, Office Managers, Credit & Collections Managers, Accounts Receivable Personnel, Bookkeepers

Custom Financial Report Writer

Have you ever wished you could customize an income statement to include a summary of accounts instead of the line-by-line detail? Are you spending time transferring data to an Excel spreadsheet to get it into the analysis form required by executive management? Custom Financial Reports can be formatted to meet these demands. This session will provide you with useful tools for formatting a custom financial as well as outline the data that can be included on a custom financial report, including current and prior years' month-to-date and year-to-date numbers, budget analysis and invoice counts, and gross and net margin calculations.

One-on-one sessions on Customer Financial Report Writer are available after the class on Wednesday afternoon. Sign up early to reserve your space.

For: General Managers, Controllers, Accounting Managers, Office Managers

General Ledger Posting Flow

This session will cover the system's automatic postings and the accounting posting flow, including all associated debits and credits for parts and service sales. Also included will be the posting flow of transactions such as time entry, inventory quantity adjustments, retained earnings, and out-of-balances.

For: Controllers, Office Managers, Accounting Personnel

Inventory Reconciliation

Tired of making large write-offs at physical inventory time? Learn how to reconcile physical to general ledger inventory every month and avoid those expensive entries. Learn to catch errors on a monthly basis instead of researching entries from an entire year. We will also discuss timing differences in updating physical and general ledger inventories, the reports to use to reconcile inventories, and recent software enhancements that will help with reconciling issues.

For: Controllers, Accounting Managers, General Managers, Inventory Control Managers, Parts Managers, Office Managers

Labor Reconciliation

Reconciling labor work-in-process (WIP) or labor inventory to the General Ledger balance can be a daunting task. Learn how labor costs are determined, what reports are helpful, and what parameters can be changed to post costs differently in order to make the reconciliation easier. This session will help you determine what data to gather and interpret for reconciliation purposes.

For: General Managers, Controllers, Accounting Managers, Office Managers, Service Managers

Legend Accounting "Did You Know?"

We've listened to your requests, and created a special session just for Accounting users. We will show you how you can eliminate time-consuming steps and increase productivity with new tips, little known techniques, and undocumented shortcuts. Discover our secrets for improving your efficiency in Legend Accounting programs.

For: Controllers, Accounting Managers, Accounting Personnel

Company-Wide

Daily Bookkeeping, Nitely & Eve Reports

Reports, reports, reports—whether you print them or utilize KOLD, join this session to learn more about these daily reports generated through nightly processes. Review valuable information on each report to help you manage your business more effectively. Plus, define report ownership and action reports for each department. We will cover management reports for Parts, Inventory Control, Service, and Accounting. For: Operation Managers, Parts Managers, Inventory Control Managers, Service Managers, Controllers, Accounting Managers

KOLD (Karmak OnLine Documents)

KOLD automatically converts your nightly, weekly, monthly, and annual reports into online documents. We'll show you how to set up and maintain KOLD to conveniently view, distribute, archive, and retrieve many Karmak reports. Learn about new features including support for multiple folders and sub-folders.

For: All Legend users

Legend Access

Karmak's terminal emulation software lets you access the Legend business system from a Windows-based PC, and includes new functions previously unavailable in other emulation products. Find out why you need it, how to use it, and how it can help improve efficiency of everyday tasks.

For: All Legend users

Parts Transaction File: Not Just For Changed Quantities

Do you want to know how to find parts that were on a voided repair order or sales order? How to find all parts returned to a specific vendor? All parts posted by a specific user? What parts were received via inter-branch? Who is making quantity changes? The dollar amount of all parts changed using Cycle Counting? If so, attend this class to discover how the Parts Transaction File can help you solve problems.

For: All Legend users

Request History Detail (AR472A)

Learn how to effectively extract detailed sales history, such as how much a specific customer has purchased, who has purchased a specific part, or who was charged for a particular billing option. AR472A, also known as the History Detail Report Dump, is useful for parts, service, accounting, and sales departments.

For: General Managers, Parts Managers, Inventory Control Personnel, Service Managers, Controllers, Office Managers

Parts

Cycle Counting & Physical Inventory

Learn how to prevent lost sales, improve customer service, and eliminate costly physical inventory mistakes with the Cycle Counting and Physical Inventory Tag system. Don't miss this discussion to learn to maintain an accurate value of your inventory. We'll review all of the introductory steps for starting physical inventory—from daily counts to annual counts.

For: Parts Managers, Inventory Control Personnel

Effective Core Management

Discover ways to more effectively manage this critical part of your business. Learn how to set up core records to correspond with the ways your vendors charge you for cores. Examine how to price cores profitably. Learn how to track cores your customers have the right to return to you. Learn how to print separate core invoices for customers and identify reports that will aid you in managing core inventory.

For: Dealer Principals, General Managers, Parts Managers

Parts — continued

Legend Inventory “Did You Know?”

By popular demand the “Did You Know?” series has been expanded into in-depth classes for each department and updated for 2008. Join us to learn about new tips, enhancements, and little known techniques in various programs that will increase productivity and efficiency in your parts department.

For: Dealer Principals, General Managers, Controllers, Parts Managers, Inventory Control Personnel, Purchasing Agents

Multiple-Branch Purchasing

Optimize your branch purchasing power and ensure smooth inter-branch transactions. We will cover the Purchase Control File along with many parameters involved with multiple-branch purchasing. Learn all steps necessary in creating an inter-branch order, filling the order, and posting it into inventory. Review the procedures for an inter-branch transfer in Parts Order Entry/Processing. Also learn to monitor open inter-branch transfers.

For: Parts Managers, Purchasing Agents, Receiving Personnel, Parts Counter Personnel

Parts Manager Checklist

We'll cover best practices for tasks to perform daily, weekly, monthly, quarterly, and annually in the Legend Parts module. Learn about valuable reports that will aid in inventory control and help you to analyze parts department performance.

For: Parts Managers, Inventory Control Personnel

Price File “Did You Know?”

We will share all our secrets for handling price files, including importing Cummins price files, how the Cat e-Hub process works, tips for Electronic Price Download (EPD), and updates of miscellaneous information off the price file.

For: General Managers, Parts Managers, Pricing Personnel

Price Updates & On-Line Pricing

Are you getting the most out of your pricing structure? This class will help you use vendor price files to their fullest extent. We'll discuss how our price file catalog helps you change prices quickly, efficiently, and accurately. Learn to update a variety of fields, request price updates, and learn the rules for requesting a price update. We will also discuss how you can establish pricing calculated from prices found in the Vendor Price File and assign that pricing to specific customers.

For: General Managers, Parts Sales Managers, Parts Managers, Pricing Personnel

Purchasing Process

Review the purchasing processes that will make the difference, including suggesting and finalizing purchase orders, receiving, average cost adjustments, and backorder processing.

For: General Managers, Parts Managers, Purchasing Managers, Inventory Control Personnel

Purchasing Theory

Gain the highest potential of the Legend Purchasing system. Learn how to set purchasing parameters to maximize inventory turns, including usage history, record type, buy time, order point, line point, economic order quantity, alternate source, and unit of measure conversion.

For: General Managers, Parts Managers, Purchasing Managers, Inventory Control Personnel

Quantity Adjustments & Average Cost

Discover all you need to know about making quantity adjustments, including programs involved, how the General Ledger is affected, and how to track users making adjustments. Also cover all aspects of average cost, including how it's calculated and which programs update it.

For: Parts Managers, Inventory Control Personnel, Controllers, Accounts Payable Personnel

Special Pricing & Contract Pricing

Do you struggle with the best way to individualize your pricing structure for your customers? Discover ways to add special pricing for specific customers and learn how to set up different scenarios. We'll include discussions about price groups, cost matrix pricing, and contract pricing.

For: General Managers, Parts Sales Managers, Parts Managers, Pricing Personnel

Service

Legend Service “Did You Know?”

By popular demand, the Legend “Did You Know?” class has been expanded to provide a more in-depth look at the Service module—with updated information for 2008. Learn new tips, enhancements, and little known techniques in various programs that will increase productivity and efficiency in your service department.

For: Dealer Principals, General Managers, Controllers, Service Managers, Service Writers

Service Manager Checklist

We'll cover best practices for tasks to perform daily, weekly, monthly, quarterly, and annually in the Legend Service module. Learn about valuable reports that will keep your service operations running smoothly and help you analyze shop performance.

For: Service Managers, Service Personnel

Time Entry Management & Labor Reconciliation

Is adjusting technician time limiting productivity in your service department? Let's review program options for adjusting or adding technician time, billable and non-billable procedures, as well as open and closed time transactions. We'll also show you reports that make labor reconciliation easier to understand and correct, and review parameter options that will improve efficiency in your service department.

For: Controllers, General Managers, Service Managers, Service Writers, Office Managers

Warranty Processing

Warranty could possibly be the biggest customer in your shop. Become proficient at warranty processing and maintenance. Discuss how to process warranty repair orders, code them, and send more complete data to your manufacturer. Learn how to cross reference original repair order numbers to secondary repair order numbers and claim numbers, and how warranty repair orders flow to the warranty schedule.

For: Service Managers, Service Writers, Warranty Administrators

Systems

Systems “Did You Know?”

Learn how to keep your Legend system running more efficiently through new tips, little known techniques, and undocumented shortcuts. Discover new ways to save time and improve systems procedures.

For: System Managers



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From Lambert-St. Louis International Airport:

Take I-70 East to Memorial Dr./Broadway Exit. Go 10 blocks and the hotel is on the right.

From South:

From North bound on I-55 take the I-70 W exit, Exit 209B, on the left. Take the Memorial Dr. exit, Exit 251C, toward Downtown/Arch/Stadium. Turn slight left to take the ramp toward Arch/Stadium. Stay straight to go onto S. Memorial Dr. Turn left onto Market St. Turn left onto S. Broadway.

From East: From West bound on I-64, take the Memorial Dr. exit toward Arch-Riverfront/Convention Center. Turn slight left onto S. Memorial Dr. Turn left onto Market St. Turn left onto S. Broadway.

From West: Take I-70 East to the Memorial Dr. exit, Exit 250B, toward Downtown/Pine St. Stay straight to go onto N. Memorial Dr. Turn right onto Market St. Turn left onto S. Broadway.



Ground Transportation Options

TransExpress Shuttle: No reservations required. Pick-up and departures approximately every 30 minutes from 6:00 a.m. to 10:00 p.m. \$16.00 one-way and \$27.00 round-trip per person from Lambert Airport to the Hilton. In the Main Terminal, the TransExpress main counter is located near exit MT-12. In the East Terminal, TransExpress is on the lower level near the Information booth and exit ET-12. For assistance proceed to any of the Hotel/Motel Reservation boards, pick up a courtesy phone and dial 91. Call 314-428-7799 or 800-844-1985, or visit www.transexpress-stl.com for details.

Exit Express Shuttle: Reservations required. \$15 one way per person, four passengers minimum. In the Main Terminal, your driver will meet you at The Meeting Place by luggage carousel M-1 with a sign showing your name. In the East Terminal, your driver will meet you at the bottom of the escalators near luggage carousel E-1 or E-2 with a sign showing your name. For assistance, go to the Airport Paging Information Center and ask them to page or call Exit Express at 314-646-1166. Call 314-646-1166 or visit www.exitexpress.com for reservations and additional information.

St. Louis MetroLink Rail System: \$3.50 one-way from Lambert Airport to downtown St. Louis, \$2.00 from downtown to the airport. Follow airport signs to the airport MetroLink station, board any outbound train, and exit at the Stadium stop. The Hilton is one block from the MetroLink station (North of the station). Visit the MetroLink website at www.metrostlouis.org for more information.

Taxi: Rates vary, but generally range from \$35-45 one-way from Lambert Airport to the Hilton.

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