KARMAK®

Technology Conference & Expo 2007
October 15-19, 2007

Spotlight on Success

Adam's Mark Hotel, St. Louis, Missouri

Spotlight on Success

Join us for the premier technology event of the year and focus on new strategies for success!

With more than 70 valuable sessions—including new and updated classes on Sales, Service, Parts, Accounting, and Systems topics—there's something to keep everyone current on the latest technology from Karmak. Plus, you'll get a sneak preview of Karmak's newest releases, and gain fresh perspectives and useful advice at meetings and roundtable sessions with the industry's star performers.

We'll highlight our development plans for the ProfitMaster® line, and invite you to help direct new modules and enhancements by giving us your input in roundtable discussions.

The Karmak Technology Conference & Expo 2007 is sure to enlighten and entertain. Brought to you by more than 25 years of heavy-duty knowledge and the latest technological innovations, it's a command performance you won't want to miss.

Box Office Admission

Conference Tracks

Flexible options let you choose the track that is right for you.

Full Track	Executive Track	Power Track
Monday–Friday: $800	**Monday–Tuesday: $425**	**Wednesday–Friday: $650**
Offers the greatest value with everything that the Karmak Technology Conference & Expo 2007 has to offer.	For busy decision makers, this track focuses on technology updates and networking opportunities.	For Karmak power users, this track offers a wide variety of educational opportunities, plus additional conference highlights.
• **ProfitMaster Design Roundtables** • **All Classes & New Product Sessions** • **OEM Breakouts** • **Welcome Reception Monday Night** • **Product Demo Room** • **Opening Session & Technology Update** • **One-on-One Appointments** • **Dinner Reception & Entertainment Wednesday Night** • **All Conference Meals**	• **ProfitMaster Design Roundtables** • **Classes & New Product Sessions Monday & Tuesday** • **OEM Breakouts** • **Welcome Reception Monday Night** • **Product Demo Room** • **Opening Session & Technology Update** • **Breakfast & Lunch Tuesday** One-on-One Appointments, Dinner Reception, and Wednesday through Friday Sessions and meals are excluded from the Executive Track.	• **Classes & New Product Sessions Wednesday–Friday** • **One-on-One Appointments** • **Product Demo Room** • **Dinner Reception & Entertainment Wednesday Night** • **Breakfast Wednesday–Friday** • **Lunch Wednesday & Thursday** Monday and Tuesday Sessions, OEM Breakouts, ProfitMaster Design Roundtables, Welcome Reception, and Opening Session are excluded from the Power Track.

Registration

The Karmak Technology Conference & Expo 2007 is coming soon. Please make note of the registration deadlines and reserve your space today.

- ■ **Conference Registration Deadline: September 21, 2007**
- ■ **Room Reservations:** Contact the Adam's Mark Hotel directly at 314-241-7400 or 800-444-2326 **before September 21, 2007** for discounted rate. Visit the hotel website at **www.adamsmark.com/stlouis** for hotel information.

  We cannot guarantee room availability after September 21, 2007.

Blockbuster Events

Opening Session & Technology Update

With Bill Healy, President/CEO

Tuesday, October 16 — 9:15-10:45 a.m.

Karmak's spotlight on success will shine on our state-of-the-art ProfitMaster software, highlighting the exciting new developments of 2007. Taking center stage will be the new Service Management module, which is expertly engineered with advanced Microsoft® technology and 25 years of best industry practices. Learn how to save time, boost revenues, improve performance, and increase productivity using the cutting-edge technology of Service Management. Additionally, discover what's in store for other ProfitMaster offerings as we discuss our plans for Inventory, Accounting, and Lease and Rental. We will feature Real-time Performance Monitor, which offers browser-based dashboards of real-time information displayed in customized views, and has been enhanced to work seamlessly with Inventory, Accounting, Service Management, Lease and Rental, and Sales Management.

We'll also discuss the compelling new Customer Sales Watch module. This innovative product lets you track and analyze customers' buying trends, create customized views of your customer sales data, and optionally export data to spreadsheets, documents, e-mail, or virtually any CRM program on the market.

We invite you to take a seat and enjoy the show as we unveil our arresting and captivating coming attractions.

Product Demo Room

Monday, October 15 – Friday, October 19

Stop by the Product Demo Room for a personal demonstration of the latest software tools and technology from Karmak. Relax and unwind with delicious refreshments, 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.

OEM Breakouts

Tuesday, October 16 — 1:00-2:00 p.m. & 2:15-3:15 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.

One-on-Ones

Monday, October 15 – Thursday, October 18

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. Get the specific advice you need to take back to your company to resolve issues or improve procedures.

These popular sessions are available by appointment only and fill up quickly. Be sure to sign up for your spot today to discuss Parts and Service, Accounting, Systems, Vendor Communications, and ProfitMaster topics.

ProfitMaster Design Roundtable Sessions

Accounting Design Roundtable

Monday, October 15 — 1:00-2:00 p.m.

Join us for an informal roundtable discussion on the features and functionality you want to see in the upcoming ProfitMaster Accounting module. We'd like to hear your ideas for accounts receivable and collections, accounts payable, general ledger and budgeting, financial reporting and analysis, and more.

For: Dealer Principals, General Managers, Controllers, Accounting Personnel

Parts/Inventory Design Roundtable

Monday, October 15 — 3:30-4:30 p.m.

Don't miss this chance to give us your feedback on what you'd like to see in the ProfitMaster Parts/Inventory module. Give us your input on the features and functionality of this future release in an open roundtable forum.

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

Dinner Reception & Entertainment

Wednesday, October 17 — 6:00 p.m.

Join us for an evening of laughter, food, and fun as professional comedian John Morgan takes the stage at Wednesday night's dinner reception. Also known as "the Ragin' Cajun", John has captivated people across the country with his easy rapport, southern charm, and energetic stage antics. He has premiered on Showtime, HBO, Comedy Central, and MTV, and was invited to perform at the prestigious Montreal Comedy Festival in the Masters level. Don't miss this hilariously entertaining event!

Conference Schedule at a Glance

Monday, October 15

Full and Executive Track Registration — 9:00 a.m.-5:30 p.m.		Product Demo Room
Class Sessions and Design Roundtables	**One-on-Ones**	10:00 a.m.- 5:30 p.m.
1:00-5:30 p.m.	2:00-4:00 p.m.	

Welcome Reception — 6:00-7:30 p.m.

Tuesday, October 16

Breakfast — 8:00-9:00 a.m.

Opening Session and Technology Update — 9:15-10:45 a.m.

Product Demo Room
10:45-11:30 a.m.

Lunch — 11:30 a.m.-1:00 p.m.

OEM Breakout Session 1 — 1:00-2:00 p.m.	One-on-Ones	Product Demo Room
OEM Breakout Session 2 — 2:15-3:15 p.m.	1:00-5:00 p.m.	1:00-5:30 p.m.
Class Sessions — 3:30-5:30 p.m.		

Wednesday, October 17

Power Track Registration — 7:00 a.m.-5:00 p.m.

Breakfast — 7:30-8:30 a.m.

Class Sessions	One-on-Ones	Product Demo Room
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.

Class Sessions	One-on-Ones	Product Demo Room
1:00-5:30 p.m.	1:00-5:00 p.m.	1:00-5:30 p.m.

Dinner Reception & Entertainment — 6:00 p.m.

Thursday, October 18

Breakfast — 7:30-8:30 a.m.

Class Sessions	One-on-Ones	Product Demo Room
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.

Class Sessions	One-on-Ones	Product Demo Room
1:00-5:30 p.m.	1:00-5:00 p.m.	1:00-5:30 p.m.

Friday, October 19

Breakfast —7:30-8:30 a.m.

Class Sessions	Product Demo Room
8:30-11:00 a.m.	8:30-11:00 a.m.

Legend Class Schedule

Monday, October 15

Combined Sessions	
Director Series Overview - 1:00-2:00 p.m.	**ProfitMaster Accounting Design Roundtable** - 1:00-2:00 p.m.
ProfitMaster Sales Management Feedback - 2:15-3:15 p.m.	
ProfitMaster Service Management Preview - 3:30-5:30 p.m.	**ProfitMaster Parts/Inventory Design Roundtable** - 3:30-4:30 p.m.

Tuesday, October 16

Combined Sessions					
New Product Overview 3:30-5:30 p.m.	**OEM Roundtable: What We Offer** 3:30-5:30 p.m.	**FET Tire Tax Credit** 3:30-5:00 p.m.	**Getting Ready for ProfitMaster Service Mgt.** 3:30-5:30 p.m.	**Network Security** 3:30-5:30 p.m.	**ProfitMaster Lease & Rental Preview** 3:30-5:30 p.m.

Wednesday, October 17

Legend Sessions			Combined Sessions		
Sales Tax Reconciliation 8:30-10:00 a.m.	**Using KOLD** 8:30-10:00 a.m.	**Legend "Did You Know?"** 8:30-10:00 a.m.	**FET Tire Tax Credit** 8:30-10:00 a.m. *Repeat*	**Sales Management Unit Maintenance** 8:30-10:00 a.m.	**RPM Legend/INFO 5 Service** 8:30-9:30 a.m. / **RPM ProfitMaster Service** 9:30-10:00 a.m.
Karmak Datalink 10:15-11:30 a.m.	**Legend System Upgrades** 10:15-11:30 a.m.	**Legend Service Repair Types & Overrides** 10:15-11:30 a.m.	**Internet Parts Sales** 10:15-11:30 a.m.	**Sales Management Unit Transfers** 10:15-11:30 a.m.	**RPM Accounting & Customer Sales Watch** 10:15-11:15 a.m.
Quantity Adjustments & Average Cost 1:00-3:00 p.m.	**Special Pricing Setup** 1:00-3:00 p.m.	**Bar Code Receiving & Cycle Counting** 1:00-3:00 p.m.	**New Product Overview** 1:00-3:00 p.m. *Repeat*	**Sales Management Deal Processing** 1:00-3:00 p.m.	**Getting Ready for ProfitMaster Service Mgt.** 1:00-3:00 *Repeat*
Parts Transaction File: Not Just for Changed Quantities 3:15-5:00 p.m.	**Price Updates** 3:15-5:00 p.m.	*Combined Session* **Real-time Performance Monitor (RPM) Overview** 3:15-5:00 p.m.	**OEM Roundtable: What We Offer** 3:15-5:00 p.m. *Repeat*	**Sales Mgt. Deal Forms Processing** 3:15-4:15 p.m. / **Sales Mgt. Deal Forms Roundtable** 4:45-5:30 p.m.	**Network Security** 3:15-5:30 p.m. *Repeat*

Thursday, October 18

Legend Sessions			Combined Sessions		
Maintaining Time in the Service Dept. 8:30-10:00 a.m.	**Parts Profit Enhancing Techniques** 8:30-10:00 a.m.	**Credit Limit Management** 8:30-10:00 a.m.	**RPM Lease & Rental** 8:30-9:30 a.m.	**Sales Management Reporting** 8:30-10:00 a.m.	**Internet Parts Sales** 8:30-10:00 a.m. *Repeat*
Warranty 10:15-11:30 a.m.	**EDI / eCommerce** 10:15-11:30 a.m.	**G/L Updates from A/R Invoicing** 10:15-11:30 a.m.	*Legend Session* **Legend Access** 10:15-11:15 a.m.	**ProfitMaster Report Generator** 10:15-11:30 a.m.	**RPM Parts Module** 10:15-11:15 a.m.
Legend Service Parameters 1:00-3:00 p.m.	**Purchasing Theory & Processes** 1:00-3:00 p.m.	**Basic Financial Report Writer** 1:00-3:00 p.m.	*Combined Session* **Mobile Repair Order Entry Roundtable** 1:00-3:00 p.m.	**Sales Mgt. "Did You Know?"** 1:00-2:00 p.m. / **Sales Mgt. Floor Plan** 2:00-3:00 p.m.	**Preparing for ProfitMaster** 1:00-3:00 p.m.
Dealing with Obsolescence 3:15-5:15 p.m.	**Cycle Counting & Physical Inventory** 3:15-5:15 p.m.	**A/P Relationship to Purchasing** 3:15-4:15 p.m. / **Accounting Enhancements** 4:15-5:15 p.m.	*Legend Session* **Daily Bookkeeping, Nitely & Eve Reports** 3:15-5:15 p.m.	**Sales Mgt. Salesman Commission** 3:15-4:15 p.m. / **Sales Mgt. Feedback** 4:15-5:30 p.m. *Repeat*	**ProfitMaster Service Management Preview** 3:15-5:15 p.m. *Repeat*

Friday, October 19

Legend Sessions				Combined Sessions	
Inventory Reconciliation 8:30-10:30 a.m.	**Effective Core Management** 8:30-11:00 a.m.	**Central Parameters** 8:30-10:30 a.m.	**Bar Code Receiving & Cycle Counting** 8:30-10:30 a.m. *Repeat*	**Sales Mgt. "Did You Know?"** 8:30-9:30 a.m. *Repeat* / *Legend Session* **Legend Service Reports** 9:30-11:00 a.m.	**RPM Sales Management** 8:30-9:30 a.m. / **Sales Mgt. Profit Calculations** 9:30-11:00 a.m.

INFO 5 Class Schedule

Monday, October 15

Combined Sessions	
Director Series Overview - 1:00-2:00 p.m.	ProfitMaster Accounting Design Roundtable - 1:00-2:00 p.m.
ProfitMaster Sales Management Feedback - 2:15-3:15 p.m.	
ProfitMaster Service Management Preview - 3:30-5:30 p.m.	ProfitMaster Parts/Inventory Design Roundtable - 3:30-4:30 p.m.

Tuesday, October 16

Combined Sessions					
New Product Overview 3:30-5:30 p.m.	FET Tire Tax Credit 3:30-5:00 p.m.	OEM Roundtable: What We Offer 3:30-5:30 p.m.	Getting Ready for ProfitMaster Service Mgt. 3:30-5:30 p.m.	Network Security 3:30-5:30 p.m.	ProfitMaster Lease & Rental Preview 3:30-5:30 p.m.

Wednesday, October 17

INFO 5 Sessions		Combined Sessions		
The Successful Controller Highway 8:30-11:30 a.m.	INFO 5 Laser Printing & GrayMatter Software 8:30-10:00 a.m.	FET Tire Tax Credit 8:30-10:00 a.m. *Repeat*	Sales Management Unit Maintenance 8:30-10:00 a.m.	RPM Legend/INFO 5 Service 8:30-9:30 a.m. / RPM ProfitMaster Service 9:30-10:00 a.m.
	Inter-Branch Parts Transfers 10:15-11:30 a.m.	Internet Parts Sales 10:15-11:30 a.m.	Sales Management Unit Transfers 10:15-11:30 a.m.	RPM Accounting & Customer Sales Watch 10:15-11:15 a.m.
End of Period Checklist: Accounting 1:00-2:00 p.m. / End of Period Checklist: Parts 2:00-3:00 p.m.	iSeries/400 Administration 1:00-3:00 p.m.	New Product Overview 1:00-3:00 p.m. *Repeat*	Getting Ready for ProfitMaster Service Management 1:00-3:00 p.m. *Repeat*	Sales Management Deal Processing 1:00-3:00 p.m.
End of Period Checklist: Service 3:15-4:15 p.m.	The Road to Version 7.2 3:15-4:45 p.m.	**Combined Session** Real-time Performance Monitor (RPM) Overview 3:15-5:00 p.m.	OEM Roundtable: What We Offer 3:15-5:00 p.m. *Repeat* / Network Security 3:15-5:30 p.m. *Repeat*	Sales Mgt. Deal Forms Processing 3:15-4:15 p.m. / Sales Mgt. Deal Forms Roundtable 4:45-5:30 p.m.

Thursday, October 18

INFO 5 Sessions		Combined Sessions		
Data Migration from INFO 5 to Excel 8:30-11:30 a.m.	End of Period Checklist: Accounting 8:30-9:30 a.m. *Repeat*	RPM Lease & Rental 8:30-9:30 a.m.	Sales Management Reporting 8:30-10:00 a.m.	Internet Parts Sales 8:30-10:00 a.m. *Repeat*
	End of Period Checklist: Parts 10:15-11:15 a.m. *Repeat*	ProfitMaster Report Generator 10:15-11:30 a.m.		RPM Parts Module 10:15-11:15 a.m.
The Road to Version 7.2 1:00-2:30 p.m. *Repeat*		Mobile Repair Order Entry Roundtable 1:00-3:00 p.m.	Sales Mgt. "Did You Know?" 1:00-2:00 p.m. / Sales Mgt. Floor Plan 2:00-3:00 p.m.	Preparing for ProfitMaster 1:00-3:00 p.m.
KOLD for INFO 5 3:15-4:15 p.m. / End of Period Checklist: Service 4:30-5:30 p.m. *Repeat*	iSeries/400 Administration 3:15-5:15 p.m. *Repeat*	Sales Management Salesman Commission Roundtable 3:15-4:15 p.m. / Sales Management Feedback 4:15-5:30 p.m. *Repeat*		ProfitMaster Service Management Preview 3:15-5:15 p.m. *Repeat*

Friday, October 19

INFO 5 Sessions		Combined Sessions	
Data Migration from INFO 5 to Excel 8:30-11:00 a.m. *Repeat*	Inter-Branch Parts Transfers 8:30-9:45 a.m. *Repeat*	Sales Mgt. "Did You Know?" 8:30-9:30 a.m. *Repeat*	RPM Sales Management 8:30-9:30 a.m.
	KOLD for INFO 5 10:00-11:00 a.m. *Repeat*	Sales Management Profit Calculations 9:30-11:00 a.m.	

INFO 5 Classes & New Product Sessions

Company-Wide

The Road to Version 7.2

Learn the essential preparations needed to upgrade to INFO 5® Version 7.2 and take advantage of its many enhancements. We'll cover the mandatory system requirements and pre-update steps necessary for a successful transition. You'll gain valuable insight into the importance of following the Pre-Update Manual carefully and completing each step properly to ensure that your upgrade goes as smoothly as possible.

For: System Administrators, Parts Managers, Controllers, and anyone who will be assisting with the upgrade to Version 7.2

Reporting

Data Migration from INFO 5 to Excel

This course will give you a basic understanding of ODBC setup and usage. This 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

KOLD (Karmak OnLine Documents) for INFO 5

Learn how to set up and use KOLD to conveniently view, distribute, archive, and retrieve many Karmak reports while saving paper, printer resources, and valuable storage space. We will go over setup procedures and how to view archived reports via Internet Explorer® and Windows® Explorer.

For: Anyone wanting to know more about KOLD

Accounting

End of Period Checklist for Accounting

Focus on the procedures and reports involved in the End-of-Day, End-of-Month, and End-of-Year cycles. Learn tips and techniques for efficient accounting operations including year-end processing, entering adjusting entries, and posting adjusting entries to prior periods.

For: Accounting Personnel

The Successful Controller Highway

This course will show you how your INFO 5 system can make your journey smooth and successful through a better understanding of the Accounting module's features and procedures. We will cover fundamentals such as accounting flow, automated entries, inquiries, reports, and financial statements.

For: Dealer Principals, CFOs, CEOs, Controllers, Accounting Personnel

Parts

End of Period Checklist for Parts

Focus on the End-of-Day and End-of-Month reports pertaining to the Parts module. Learn how to set up reports that can enhance parts department operations.

For: Parts Personnel

Inter-Branch Parts Transfers

Do you want to minimize "dead stock" parts and maintain a lower overall inventory value? If so, attend this class and learn how to use your INFO 5 system to effectively transfer parts between locations at your dealership. Learn the process that will allow a branch to request parts from another branch (via a purchase order), and then have the counter ticket automatically generated at the shipping branch. We'll cover procedures for requesting parts and turning the purchase order into a counter ticket, as well as the accounting that takes place in the background.

For: Controllers, Parts Managers, and others wanting to learn more about the parts transfer process. Attendees should be using INFO 5 Version 7.2 or higher or plan to install Version 7.2 in the near future.

Service

End of Period Checklist for Service

This session will focus on the End-of-Day and End-of-Month reports related to the Service module. Learn how to set up reports that can streamline service operations and help you analyze shop performance.

For: Service Personnel

Systems

INFO 5 Laser Printing and GrayMatter Software

For people who manage printing in a business environment, this class will show you how to save money and improve efficiency by utilizing Network Centralized Printing. We will provide an overview of network printing and how electronic forms work, and discuss the advantages of output management.

For: System Managers

iSeries/400 Administration

Designed for system administrators who want to utilize ODBC access from their PCs, this session will cover the installation and use of iSeries Navigator. Learn how to use it to manage iSeries/400 jobs, messages, spool files, output queues, print writers, user profiles, system security, and performance.

For: System Administrators

Legend & INFO 5 Classes & New Product Sessions

Company-Wide

New Product Overview

See our latest products and learn what they can do for you. We'll introduce you to the new Mobile Repair Order Entry, Internet Parts Sales (IPS), and Real-time Performance Monitor (RPM) modules, as well as the Legend interface to Gasboy 1000 series pumps.

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

Real-time Performance Monitor (RPM) Overview

Learn to set up and use the new and improved RPM, our browser-based dashboard of real-time information from your Karmak system. The newest version provides customizable views of current and historical data for Service, Parts, Accounting, Lease/Rental, Sales Management, and Customer Sales Watch. Build your own views, enter comments right on the screen, and drill down to see details. Easily export or e-mail RPM views, perform on-the-fly filtering to get just the right data, and display several views on screen at once.

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

Accounting

FET Tire Tax Credit

Proper application of tire tax credits is a controversial topic for many dealerships. The IRS gives dealers a lot of latitude with regard to how FET tax is billed, yet not much latitude on how it should be reported. Every dealer wants to claim all available tire tax credits and pay the IRS the amount due, however, completing IRS documents can be a daunting task. Join Karmak Chairman Richard Schien for this informative session which will include many billing and reporting examples. Learn which are IRS-approved and which are not.

For: CFOs, Controllers, Accountants, Office Managers

Accounting and Sales

RPM Accounting and Customer Sales Watch Modules

The Customer Sales Watch module offers a powerful tool for tracking and analyzing customers' buying trends. Learn to create customized views of your customer sales data, and export that data to spreadsheets, e-mail, or to a variety of formats for uploading to your CRM program. Use the new Accounting module to monitor customer account status and aged receivables, review vendors and aged accounts payable, view G/L balances and transaction details, or watch margins and absorption on a daily, monthly, or annual basis.

For: General Managers, Controllers, Sales Managers, Sales Personnel

Lease and Rental

ProfitMaster Lease and Rental Preview

The new ProfitMaster Lease and Rental system is underway. Based on customer input, we have the features outlined and we're ready to share them with you. Don't miss our plans to improve your lease or rental operations with this new high-powered Lease and Rental system.

For: Dealer Principals, General Managers, Lease/Rental Managers and Personnel

RPM Lease and Rental Module

Use the power of RPM to build customized views of up-to-date information from your business system on available units, contracts about to expire or overdue for billing, daily unit utilization, units due for preventive maintenance, and daily or monthly unit Profit and Loss.

For: General Managers, Controllers, Leasing Managers, Preventive Maintenance Managers, Service Writers

Parts and Service

Director Series Overview

Director Series is a stand-alone parts and service system for fleets, repair shops, and parts distributors that interfaces with your Karmak business system for electronic purchasing and parts pricing. Discover how Director Series can help you fill orders more efficiently, save time in the parts department, and improve customer satisfaction. We will discuss the PartsDirector® and ServiceDirector® modules, interface to QuickBooks, and more.

For: General Managers, Parts Managers, Service Managers

OEM Roundtable: What We Have to Offer

Join us to learn what Karmak has to offer in factory communications. We will discuss the features and functionality of existing, just released, and future OEM modules in an open roundtable forum.

For: Dealer Principals, General Managers, Parts Managers, Service Managers

Parts

Internet Parts Sales (IPS)

Come see the new, improved ProfitMaster module that will free up time for your counter people. The enhanced IPS allows your customers to search for, select, and order parts directly from your inventory via the Internet. Learn what is required to run IPS, how to set it up, and how your customers order parts, plus the numerous enhancements to both the administrative and retail sites.

For: Parts Managers, General Managers, Inventory Personnel

RPM Parts Module

Discover how easy it is to search for obsolete or special order parts on hand, scan purchase orders, monitor parts sold at special prices, or review backorders using the powerful data display tools available in RPM.

For: Parts Managers, General Managers, Controllers

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

RPM Sales Management Module

Learn how you can use RPM's flexible, color-coded displays to monitor floor plans and lenders, track unit history, review LPOs, search for available units and units on order, or see the details of open deals with just one click.
For: General Managers, Controllers, Sales Managers, Sales Administrators

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: All Sales Management users

Sales Management Deal Forms Roundtable

Give us your feedback on processing municipality, state, OEM, and internal deal forms in the Sales Management module. We want to hear your opinions and objectives regarding this Sales Management feature in an open discussion.
For: All Sales Management users

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: All Sales Management users

Sales Management "Did You Know?"

ProfitMaster Sales Management Versions 1.5 and 1.6 contain 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 Feedback

We want to hear from you! This feedback session is your opportunity to give us input on all aspects of Sales 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 Sales Management releases.
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, as well as how to maintain and post flooring worksheets.
For: All Sales Management users

Sales Management Reporting

Review some of the more detailed reports such as agings, sales analysis, and sold units. Discover how they work and where the data comes from.
For: All Sales Management users

Sales Management Profit Calculations

This session covers the setup that drives profit calculations, how the different parts of the module use these parameters, and how the cost of a unit is calculated.
For: All Sales Management users

Sales Management Salesman Commission Roundtable

This is your opportunity to give us feedback on calculating salesperson commissions in the Sales Management module. Join us for an open discussion on the features and functionality of this Sales Management component.
For: All Sales Management users

Sales Management Unit Maintenance

Discover the Sales Management tools that allow you to track every aspect of a unit's history, monitor costs, and improve your sales operation. Learn to create and maintain units, characteristics, components, comments, and attached documents, as well as procedures for unit transfers, unit purchase orders, local purchase orders, and receiving units. We'll also cover time-saving features such as unit mass change, unit copy/new, and LPO mass creation.
For: Sales Managers, Sales Administrators, Sales Personnel, General Managers

Sales Management Unit Transfers

Learn the ins and outs of unit transfers, including changing or adding a VIN, transferring a unit to another branch or department, and changing inventory type, serial number, or stock number.
For: All Sales Management 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.
For: All Sales Management users

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 Roundtable

Preview our new application that lets service personnel open a repair order from any location via a portable PC. We'll discuss the features and benefits including eliminating technicians' time spent hand writing repair orders and re-keying later, generating an invoice and capturing the client's signature in the field, and sending data to the business system and storing it in KOLD.
For: General Managers, Service Managers, Service Personnel

ProfitMaster Service Management Preview

Get a first-hand look at the upcoming ProfitMaster Service Management module. Improve service sales through effective analysis and efficient pricing of your services to the customer. Don't miss this session to learn its basic setup and functionality, walk through the major applications, and see new features such as deferred repairs, attached documents, technician performance, and more.
For: Service Managers, Service Writers, General Managers

RPM Legend/INFO 5 Service Module

Get a close-up look at the new and improved RPM Version 1.3 for Karmak Legend and INFO 5 business system Service modules. Build customized views to track critical metrics in your service department, including monitoring repair orders waiting for parts, identifying operations where time worked is over billing hours, scanning available technicians, and more.
For: Service Managers, Service Writers, General Managers

RPM ProfitMaster Service Management Preview

Preview the newest RPM offering that works with our advanced ProfitMaster Service module. See how easy it is to build customized views of the repair orders in your shop that now include detailed charges and gross margin.
For: Service Managers, Service Writers, General Managers

Legend Classes & New Product Sessions

Company-Wide

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

Legend "Did You Know?"

Eliminate time-consuming steps and increase productivity on your Legend business system through new tips, little known techniques, and undocumented shortcuts— updated for 2007. Discover our secrets and shortcuts to improve your efficiency in Legend Parts, Service, and Accounting programs.
For: Dealer Principals, General Managers, Controllers, Department Managers, Service Writers, Inventory Control Personnel, Sales Personnel, Purchasing Agents

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

Reporting

Basic Financial Report Writer

Have you ever wanted to customize a balance sheet or income statement? Then this class is for you! We will walk through the steps to build the most commonly requested reports and give you the tools you need to create your own report.
For: Controllers, Accounting Managers, MIS Managers

Daily Bookkeeping, Nitely, and 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

Karmak Datalink

Find out how easily Karmak Datalink moves data from the Legend system to your PC with Open Database Connectivity (ODBC). Includes instruction on how Microsoft Excel and Business Objects® Crystal Reports can be used to analyze data generated by the Legend business system.
For: General Managers, Parts Managers, Pricing Managers, Service Managers, System Managers, users of Legend's Sales and Profit software module

Legend Service Reports

Discover reports that help you manage a profitable service department and alert you to potential problems, including shop productivity, recording your technicians' efficiency, and others that help you determine technician compensation. We'll also cover printing unit history reports for your customers and daily operating reports.
For: Service Writers, Service Managers, General Managers

Using 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

Accounting

Accounting Enhancements

Did you know that Legend Accounting programs are continually updated? Come to this session to see the exciting new accounting enhancements and learn why you should request the latest update.
For: Controllers, Office Managers, Accounting Managers, Accounting Personnel

Accounts Payable Relationship to Purchasing

An in-depth review of the Miscellaneous Purchase Order system, open postings, and stock purchase orders. You'll learn how these functions integrate with Accounts Payable. Emphasis will be placed on reconciling payables entries and understanding the significance of the relationship created between the Purchase Order system and payables.
For: Controllers, Office Managers, Accounting Managers, Accounts Payable Personnel

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 control customer credit limits. We'll explore the setup options to handle credit limits and the reports that can be generated to help control them.
For: Controllers, Accounts Receivable Personnel, Bookkeepers

General Ledger Updates from Accounts Receivable Invoicing

Discover the flexibility available in researching general ledger updates from **Accounts Receivable Invoicing (AR820)**. Want an easy way to track expensed invoices, to check cash invoices from a specific day, or to reconcile tax collected? AR820 is the best tool for this kind of research.
For: Office Managers, Controllers, Bookkeepers, 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. Discussion will include timing differences in updating physical and general ledger inventories and the reports to use to reconcile inventories.
For: Controllers, Accounting Managers, General Managers, Inventory Control Managers, Parts Managers, Office Managers

Sales Tax Reconciliation

Overview of sales tax, concentrating on setup, reconciliation, methods to control sales tax calculation, and updating reports.
For: Controllers, Office Managers, Accountants

Systems

Central Parameters

Central Parameters control options within Legend programs. Learn how those parameters function, the hierarchy they follow, and how to maintain and change parameters. In addition, we will focus on Eve, Nitely, and Bookkeeping parameters, recent enhancements, and how to save history.
For: System Managers, General Managers, Parts Managers, Service Managers, Accounting Managers, Controllers

Legend System Upgrades

Want to learn more about upgrading your Legend software? Find out what the upgrade commands actually do as you become more skilled in backups, verifying CDs, and issuing commands from the $ prompt. We can help you understand the various CDs you receive, and also make recommendations for your specific system on the best way to complete your business system upgrade to avoid costly downtime.
For: Owners/Presidents, Dealer Principals, General Managers, System Managers

Parts

Bar Code Receiving and Cycle Counting

Learn how to streamline inventory-related procedures, such as scanning multiple purchase orders in one session and reviewing and correcting quantities before transmitting data to your Legend system. Reduce time between receiving and posting purchase orders and perform more accurate and efficient cycle counts.

For: Parts Managers, Purchasing Managers, Inventory Control Managers and Personnel, Purchasing Agents, Branch Managers, Receiving Clerks

Cycle Counting and 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

Dealing with Obsolescence

Each organization has its own set of standards for identifying dead stock and dealing with the disposition of that stock. This class is designed to invite open communication about obsolete inventory and provide participants with ideas to implement at their businesses.

For: Parts, Purchasing, and Inventory Managers and Personnel

EDI: What eCommerce Can Do for You

Get an insider's look at Legend eCommerce—what it offers and how it works. Join us for a presentation and open discussion covering EDI documents and participating VANs and vendors. A must for those who need or want to know everything about EDI on Legend.

For: Dealer Principals, Owners/Presidents, General Managers, Parts Managers, Controllers

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 Profit Enhancing Techniques

Maximize your profits with a wide range of creative parts pricing techniques—special price multipliers, contract pricing, core pricing, parts and service pricing, cost matrix pricing, velocity pricing, and inventory price rounding. The session will cover all of these techniques for enhancing your profits.

For: Owners/Presidents, Dealer Principals, General Managers, Sales Managers, Parts Managers, Pricing Personnel

Price 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

Purchasing Theory and Processes

Gain the highest potential of the Legend Purchasing system. Learn how to set purchasing parameters to maximize inventory turns, including usage history, buy time, order point, economic order quantity and alternate source. Review the purchase 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

Quantity Adjustments and 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 Setup

Discover new techniques for customer special pricing programs to use them to their fullest potential. Streamline your current setup. Learn how to take full advantage of all Legend pricing features. We'll also discuss price groups, special pricing features, cost matrix, and velocity pricing.

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

Service

Legend Service Parameters

Check your program settings with the help of our expert! We'll look at different settings for various Service programs to see how they can help your system run more efficiently.

For: Dealer Principals, General Managers, Service Managers, System Managers

Legend Service Repair Types and Overrides

Are you making the most efficient use of your Service module? We'll show you ways to review specific service-related setup programs and how various reports can help you maintain the integrity of the data on your system. Discussion will include maintaining repair types, customer overrides, and unit files, and reports for repair history, customer units, and history detail.

For: Dealer Principals, Owners/Presidents, General Managers, System Managers

Maintaining Time in the Service Department

Review program options for adjusting or adding technician time. Discuss procedures for billable and non-billable time, as well as open time and closed time transactions. We will also review the *Employee Time Report (RS830)* and *Repair Shop Bar Code Time Entry Transaction Report (RS222)*.

For: Service Managers, Service Writers, General Managers

Warranty

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

Adam's Mark Hotel

Fourth & Chestnut Streets
St. Louis, Missouri 63102
Reservations: 800-444-2326
Phone: 314-241-7400
Fax: 314-241-6618
www. adamsmark.com/stlouis

Located directly across from the Gateway Arch, the hotel is within walking distance of the Edward Jones Dome, Busch Stadium, Laclede's Landing, and St. Louis Centre. Beautifully designed with a three-story atrium and a pair of nine-foot tall bronze horses created in Italy. With six restaurants and lounges, it offers more dining and entertainment choices under one roof than anywhere else in town.

From Lambert-St. Louis International Airport: Take I-70 east to Memorial Drive, Exit 250B. Turn right onto Market Street. Turn right onto Fourth Street. Turn right onto Chestnut.

Ground Transportation Options

TransExpress Shuttle: No reservations required. Pick-up and departures approximately every 30 minutes 6 a.m.-10 p.m. $16.00 one-way and $27.00 round-trip per person from Lambert Airport to the Adam's Mark Hotel. 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 and $25 round trip. 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 an outbound train, and exit at the 8th and Pine Street stop. The Adam's Mark Hotel is located four blocks east at 4th and Pine Street. Visit the MetroLink website at **www.metrostlouis.org** for more information.

Taxi: Approximately $33-45 one-way from Lambert Airport to the Adam's Mark Hotel. Rates are $2.50 per 1/10th mile, $1.50 each additional 1/10th mile, $1 each additional person.

KARMAK®

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