



Spring into Action

TopForm Software User Conference 2002

Information Package

Contents

Daily Schedule	2
Travel	3
General Information	3
Accommodations	3 - 4
Conference Details	4 - 5
Breakout Topics	5 - 8



DAILY SCHEDULE

Time	Activity
Thursday - April 25th	
11:30 – 6:00	TopForm Golf Challenge
12:00 – 6:00	Registration
6:00 - 8:00	Welcome Reception
Friday - April 26th	
7:00 - 8:00	Continental Breakfast
7:30 - 6:00	Registration
8:30 - 10:15	General Session
10:15 - 6:00	TopForm Showcase
10:30 - 11:00	Refreshments
11:00 - 12:15	Breakout 1 & Help Desk
12:15 - 1:15	Lunch
1:15 - 2:30	Breakout 2 & Help Desk
2:30 - 3:00	Refreshments
3:00 - 4:15	Breakout 3 & Help Desk
4:15 - 4:30	Refreshments
4:30 - 5:45	Breakout 4 & Help Desk
6:00	Dinner
Saturday – April 27th	
7:30 - 8:30	Full Breakfast
8:30 -9:45	General Session
10:00 - 11:15	Breakout 5 & Help Desk
11:15 –11:30	Refreshments
11:45 - 1:00	Breakout 6 & Help Desk
1:00- 2:00	Lunch
2:00 - 3:15	Breakout 7 & Help Desk
3:15 – 3:45	Refreshments
3:30 – 4:15	Closing Session



TRAVEL

Driving Directions

The Renaissance Waverly Hotel is located at 2450 Galleria Parkway. From Atlanta Hartsfield Airport follow signs to Camp Creek Parkway. Turn right onto I-285 North. Follow to exit #19, Cobb Parkway. Make a right onto Cobb Parkway/Highway 41. Take a left at the first traffic light. Follow the road about ¼ of a mile and the Waverly Hotel will be on your right.

Airport Shuttle

Transportation from Hartsfield is quick and convenient via A & M Limo located outside baggage claim. Current cost is \$20 per passenger. To contact A & M Limo call 770-955-4565.

Rental Car

If you want to rent a car, all major rental car companies have desks at Atlanta's Hartsfield International Airport.

Travel Time

The Renaissance Waverly Hotel is approximately a 25-minute ride from the airport and 10 miles from downtown.

GENERAL INFORMATION

Attire

All events at this year's Conference will be business casual.

Weather

Weather in the Atlanta area during April can range from the mid-60's to the mid-70's.

ACCOMMODATIONS

Reservations

This will be handled this year by TopForm Staff with the information that you provide with your conference registration. Should your arrival and departure dates change once you have registered please contact TopForm with your changes.

Hotel Check In

Check-in time is 3:00 pm and check out time is 12:00 Noon. The Hotel's policy requires a credit card imprint upon check-in.

Expenses / Meals

Travel, room, miscellaneous expenses and those meals not included with the conference are the attendee's responsibility. Meals included with this year's Conference begin with breakfast, lunch, and dinner on Friday and breakfast and lunch on Saturday. There will also be a welcome reception on Thursday evening.

Recreation / Entertainment

The Galleria Specialty Mall is connected to the lobby of the Renaissance Waverly Hotel. This 275,000 square-foot mall features 38 fabulous boutiques and restaurants. At the Galleria Mall, you will enjoy a relaxing atmosphere of specialty shops and cafes among the tree-lined waterfalls. The Galleria-Eight Movie Theater is also available for your entertainment. In addition, the Waverly Health Club and Spa offers indoor and outdoor pools, steam room, sauna, exercise room, outdoor jogging course, all free of charge.

Messages

If your office needs to contact you during the conference, they can call the Renaissance Waverly Hotel direct at 770-953-4500 and specify that they need to leave a message for an attendee of the TopForm User Conference. After taking the information, the operator will forward the message to our Registration Desk. Please check there periodically for messages.

Business Service Center

A Business Service Center is located on the 2nd level next to the Ballroom of the Conference Center. This center will be open during meeting times and is available for sending and receiving faxes, emailing, making copies, etc. Charges for these services can be applied to your room account. The fax number at the Business Center is 770-303-3136.

CONFERENCE DETAILS

TopForm Golf Challenge

The TopForm Golf Challenge is back by popular demand! We are arranging a Best-Ball tournament for Thursday, April 25 with a Shotgun start at 12:00 noon. The championship golf course package will include green fee, cart, range balls, tournament services and prizes. The foursomes will be formed by your requests and skill level. Reserve your spot today by contacting Anthony Mullins, at 770.239.5452 or amullins@topform.com. Further details are coming soon.



Registration Desk

Once you're settled in at the Renaissance Waverly Hotel please register for the Conference. Thursday registration will be on Lobby Level from 12:00pm – 6:00pm. On Friday the registration desk will be located outside the TopForm Showcase area and will be open from 7:30am – 6:00pm. Conference materials will be distributed upon registration.

Name Badges

You will receive a name badge with your materials package. Your badge identifies you as a general attendee or an attendee who will have access to the System Administration breakouts. You will be required to show your badge in order to gain access to conference events.

Cancellation Policy

Cancellations within 30 days of the Conference will be charged a \$100 cancellation fee. Cancellations less than 21 days will be charged a \$200 cancellation fee. Cancellations within 14 days will be charged a \$300 cancellation fee. Any cancellations after the 14-day cut off will not be given a refund. These cancellation charges do not include cancellation or similar charges you may incur from the hotel or other vendors.

TopForm Showcase

Friday: 10:15-6:00 pm Saturday: 8:00-4:15 pm

The TopForm Showcase gives you a chance to explore new applications, see their features and even see live demonstrations hosted by solution experts. As you look at the exhibits, TopForm personnel will be available to answer your TopForm and other information systems questions.

Welcome Reception / 6:00-8:00 pm Thursday

Cocktails will be served in the Atrium giving you chance to network with other Users and TopForm representatives.

GENERAL SESSIONS

Friday, April 26th, 8:30 am – Opening General Session

The opening General Session will be on Friday, April 26th at 8:30 am. This General Session will provide you with all the information you need to make the most out of your Conference. Learn about all the new capabilities that will be on display in this year's TopForm Showcase, particularly the TopForm 6.0 Release including our new Graphic User Interface. Many new features in TopForm Web.ec also will be unveiled including the new TopForm Variable Print Option!

Saturday, April 27th, 8:30 am, General Session

Gordie Peterson of Document Resources has volunteered to present how they have fully integrated an imaging and workflow system into TopForm. He will also provide insight into how this imaging and workflow system has become a major product line that they sell into their customer base. Through this presentation, you will learn, not only what is possible in the area of imaging to improve your own business, but also perhaps learn of new areas to expand your own business.

BREAKOUT TOPICS

Hands on training on the new TopForm Graphic User Interface (GUI). Get first hand instruction and hands on experience on how to maneuver around in TopForm new Windows front end. We will be preparing special training classes and training materials to “train your trainers”. Your key personnel should be able to return to your office with the knowledge and supplemental materials to bring the rest of your staff up to speed. Particular emphasis will be given to the following areas:

- Graphic User Web.ec Administration
- Request for Quote and Quoting
- Order Entry
- P/O Receiving and Billing
- Custom Item File and Specifications
- Reporting and the new TopForm Report Viewer
- Contact Management

TopForm Variable Print Option. In this session, we will provide an introduction and training on how to create custom templates and variable images for on-line ordering and proofing.

TopForm Web.ec - New Features. In this session we will cover many of the newer features that can be implemented with Web.ec, including Credit Card Processing, Stock Catalogs, the My Catalog Feature, e-logistics and expanded keyword search as well as the TopForm Variable Print Option.

TopForm Web.ec Workshop. This popular session from the fall conference will be repeated in the spring. During this session, users will be able to bring their issues to the forefront and learn first hand how to resolve them. You will also expand your knowledge by learning about other users issues and resolution.

TopForm XML Interoperability – Now that orders can be received into TopForm via XML technology, we need to provide information and training on how to make this work in your organization. This session will provide information and training in this area. It will also be followed by a round table discussion to allow users to discuss what they want from TopForm in the form of XML interoperability in the future.

TopForm Web.ec - New TopForm Pages and Page Design - TopForm has created new sets of standard pages. These pages, now available to you, are in the form of “Style Sheets” so that you can very easily change colors, fonts, background and graphical elements. These pages will not require any html programming nor will it require any special tools. Come learn everything you need to know about how to implement and use these new pages.

TopForm Web.ec System Administration – Among other things, this session will cover managing Images, email setup, connectivity, testing new pages and features, metatags (tags that provides additional information for administration purposes) and new error logs.

ODBC Workshop– Now that ProvideX has provided everyone access to ODBC capability, what better time to learn more about how to use it. Bring your ODBC reporting wish list to this workshop and we’ll get you started. Remember to use ODBC successfully, you must be proficient in one or more of the tools you will be using to access your TopForm data, i.e., Microsoft Access or Excel, Crystal Reports, etc.

Print Management Setup (alias Forms Management) - This ever-popular session will be repeated until our customers stop telling us they need it. It will cover the proper way to setup a client in Print Management. What is usage and how it is calculated, How to process you clients efficiently at the end of the month. Counted vs. Issue Based Usage and more.

System Administration - Learn what you need to properly maintain your system and your data. This session will cover some of the basic fundamentals, including proper back-up procedures, managing disk space and basic trouble shooting techniques. This session is a must for all system administrators from novice to advanced levels.

Everything you ever wanted to know about TopForm output. - In this session we will cover configuring printers in TopForm, VSI*Fax administration, and TopForm email capabilities. Since TopForm works hand in hand with JetForm Central for electronic output, relevant information on JetForm will also be provided. We will also provide information on the new Print Key software that is included with ProvideX.

Order Processing Special Situations – This standing room only session from the last TopForm conference will also be repeated. Here we cover the many different types of orders and how to best handle them in TopForm. Examples include (1) Sales Orders with multiple Ship-to's where some inventory will be shipped to the client and some into a distributor warehouse. (2) Orders with multiple vendors. How to tell vendor A to ship to Vendor B without using message lines. (3) Stopover Orders, orders that are being delivered to your warehouse where all you need to do is print a packing slip to ship or deliver the goods. (4) Direct Mail Orders with pre-paid postage. (5) Orders with multiple costs for goods to be inventoried on a Bill-as-shipped basis and more.

TopForm Security. As the TopForm system administrator in your office, it is not only important that you coordinate the uses of the various modules of the system but to ensure that your operators only have access to the applications they need. In this way you are not only protecting critical business information but can be making their job easier by streamlining their options. This session will review all of the security controls and your options for customizing the various data entry programs throughout your TopForm system,

TopForm File Management – In this session we will cover frequently run utilities and TopForm File Management. We will also spend some time on the TopForm Archive Module which, as you probably already know, allows you to have archived images of certain TopForm output, Invoices, Summary Bills, and your accounting journals (Cash Receipts Journals, Cash Disbursements Journals, etc.). How should you manage these potentially very large files?

Taking Advantage of TopForm Features – During the training and implementation phase, we attempt to put into operation all the latest-greatest features available in TopForm. However, new features keep coming along. Are you sure you are getting the most out of your TopForm Software? This session will cover many new and/or advanced features of TopForm and how to implement and manage them.

Roundtable Discussions - As a result of your input, we have added even more roundtable discussions to the schedule. We are planning Roundtables on the following topics:

Document Imaging and Workflow – Chaired by Gordie Peterson, Document Resources
As stated above Gordie will be presenting in the General Session presentation on Saturday morning how they have integrated images and workflow into their TopForm system and how they resell software and services to create the same type of utility to their customers. This roundtable is being provided for further discussion of the concepts. We would also like to get some specific input as to what you would like to see TopForm provide you in terms of future development in this area.

Bar Code Data Collection – Chaired by Jim Worrell, Worrell Corporation
At last year's conference, Jim and others set the groundwork for TopForm Bar Code Data Collection development and followed up with some preliminary specifications for how he perceives this system should work for the TopForm distributor. Although our plan is to have some of the pieces in place by the time of the users conference, we will certainly need more input and direction.

XML Interoperability – Co - Chaired by Marty Peterson, MHC, Nic Greco, CFC and Dan Schroer, Prograde. MHC has orders created in TopForm as a result of entries in Four51 using XML technology. Prograde has their P/O Receiving automatically performed by receiving vendor invoice data from CFC. Come hear the success stories directly from the people involved and participate in discussions regarding future XML development.

Office Supply Sales and Accounting – Participation by United Stationers

TopForm has recently created an interface to DDMS industry specific software for office supply sales. We are also working with United to develop a direct interface. Join United and us in this discussion regarding your needs and expectations.

TopForm Accounting Power Users – Chaired by Connie Truan, Webb Mason

This session will allow the power users of TopForm to get together to draw on each other's experience in search of better solutions to issues that they might be having.

Print-to-Mail – Co-Chaired by Pete Mattson, MHC and Glen Hilbert, GDX

To accommodate our sister company, GDX, we have performed programming in TopForm to facilitate the use of a Print –to-Mail Invoice. This Roundtable will talk about your internal use of Print-to-Mail documents as well as sales opportunities in selling this technology.

Large TopForm Distributor Meeting - Chaired by (To be announced)

Small TopForm Distributor Meeting - Chaired by (To be announced)

These meetings are designed to bring together distributors of common size so that they can discuss issues that affect their operations and their use of TopForm Software. Although anyone is welcome to either meeting, we have set the following guidelines

Large TopForm Distributor - 24 user and higher

Small TopForm Distributor – 16 user and lower

