

24<sup>TH</sup> ANNUAL USER CONFERENCE

# interAXions

MAY 15-18, 2018 | FLORHAM PARK, NJ



BLUEPRINT FOR  
EXCELLENCE

Presented By:



BREAKOUT SESSION DETAILS



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## **WEDNESDAY, MAY 16<sup>TH</sup>**

### **101 WHAT'S NEW AND TOP TEN REQUESTS - PART I**

**(9:10am - 10:30am)**

This opening session will feature highlights and demonstrations of the new development enhancements that were completed throughout the year. The class will also focus on some of the Top Ten items submitted by the attendees and a status update on the software in general.

### **102 WHAT'S NEW AND TOP TEN REQUESTS - PART II**

**(10:40am - 12:00pm)**

This session is a continuation of What's New and Top Ten Requests Part I. It will feature highlights and demonstrations of the new development enhancements that were completed throughout the year. The class will also focus on some of the Top Ten items submitted by the attendees and a status update on the software in general.

### **103 WHAT'S NEW AND TOP TEN REQUESTS - PART III**

**(1:15pm - 2:15pm)**

This session is a continuation of What's New and Top Ten Requests Parts I and II. It will feature highlights and demonstrations of the new development enhancements that were completed throughout the year. The class will also focus on some of the Top Ten items submitted by the attendees and a status update on the software in general.

### **104 INVENTORY MANAGEMENT**

**(2:25pm - 3:25pm)**

How healthy is your warehouse? If keeping your inventory up to date at the proper levels with proper expiration dates is part of keeping your warehouse healthy, this class is for you. This class will review lot expiration and shelf life options within the system for both the graphical interface and the wireless. We will also cover items you can run or review to make sure everything is functioning properly. Chempax C/S has many different ways to track and run your inventory, so take this class to see if you are missing something.

### **105 CATCHING UP WITH CHEMPAX ON YOUR OWN WORKSHOP\***

**(2:25pm - 3:25pm)**

Designed as an add-on to the What's New Classes, Catching up with Chempax will allow you to see some of the new features of the software in a hands on environment. The class will focus on a sample of new features and walk you through some exercises that demonstrate how they can be used.

### **106 CHEMPAX C/S DIAGNOSTIC SESSION\***

**(3:30pm - 5:00pm)**

This lab session will be your interactive, hands-on look at the newest features of Chempax C/S. This will be your opportunity to try out the new functionality and spend some time with the Chempax C/S Team on your specific company issues. Bring your questions and have them answered in an intimate setting. In the past, this class has proven to be one of the most anticipated sessions of the conference.

## **THURSDAY, MAY 17<sup>TH</sup>**

### **201 OVERVIEW OF G/L AND FINANCIAL BUDGETS**

**(8:30am - 9:30am)**

Understanding your financials and how to use Chempax C/S to enhance your financials is key. This class will give an overview of the G/L module and review some lesser known features. This class will also review Financials Budgets within Chempax and how to use them efficiently. The Financial Budgeting knowledge from this class will be leveraged in the Financial Report Writer workshop.

### **202 THE POWER OF AUTOMATION WORKSHOP**

**(8:30am - 9:30am)**

This workshop will focus on making things easier. There are many tasks or functions in Chempax C/S that can be simplified through some set up but that set up is not always done. This class will cover a couple of those items with their set up to get you familiar with the features. Some of the topics may include Email Customization, Image attachment and printing.

## **THURSDAY, MAY 17<sup>TH</sup>**

### **203 CATCHING UP WITH CHEMPAX ON YOUR OWN WORKSHOP\***

**(8:30am - 9:30am)**

Designed as an add-on to the What's New Classes, Catching up with Chempax will allow you to see some of the new features of the software in a hands on environment. The class will focus on a sample of new features and walk you through some exercises that demonstrate how they can be used.

### **204 MRP**

**(9:40am - 10:40am)**

Discover the latest changes to MRP in this class. We will discuss the MRP module as a whole covering general functionality and then get into the newest additions and enhancements. While the class will have a directed path, there will be time at the end for any questions you may have.

### **205 BUSINESS INTELLIGENCE DATA ANALYSIS GUIDED TOUR WORKSHOP**

**(9:40am - 10:40am)**

Similar to last year, we will host a hands on workshop to show a few of the very powerful features within Microsoft Power BI. This walk through workshop will allow you to see just how easy it is to analyze your data. Join us to see how you can improve your business by using BI.

### **206 THE POWER OF FINANCIAL DATA WORKSHOP**

**(9:40am - 10:40am)**

This workshop will give an overview of the Financial Report Writer and its uses. You will also learn how to create multiple reports out of one standard report for different divisions as an example. This class will also cover some tips that we would recommend using when creating and printing your financial reports.

### **207 CHEMPAX ADMINISTRATION**

**(10:50am - 11:50am)**

Chempax C/S Administrators wear many different hats. This year the Administration class will cover more of the support side of that role. This class will review what is available in on-line help and talk about the new procedures through the online help. We will also talk about transaction purging and other high level items you might consider doing to have the system run its best.

### **208 NON-CONFORMANCE WORKSHOP**

**(10:50am - 11:50am)**

Having a detailed audit trail of customer complaints and other customer service issues can be essential to long term customer satisfaction, not to mention required for certain industry certifications. The Chempax C/S Non-Conformance module allows for the standardized entry and tracking of this important data, regardless of whether the non-conformance is tied to a Chempax transaction. This on your own workshop will take you through the module to see how it will work for you.

### **209 EXCEL TIPS AND TRICKS WORKSHOP**

**(10:50am - 11:50am)**

This hands on workshop will introduce you to some of the advanced features of excel that can help you analyze and review your Chempax data. Think you know all Excel has to offer, think again and take this class to see what else there is.

### **210 TRANSPORTATION OVERVIEW**

**(1:00pm - 2:00pm)**

This "back to basics" class will discuss Transportation in a general sense. The class will look at recent changes while discussing the functionality in depth. This class will be great for those who have had an interest in using Transportation but haven't jumped in just yet as well as those who are currently using it.



## **THURSDAY, MAY 17<sup>TH</sup>**

### **211 WIRELESS FORUM**

**(1:00pm - 2:00pm)**

Get to know Wireless Chempax C/S. This class will start with a very brief overview of the Chempax C/S Wireless set up. Then the class will talk about new features that have been added to Wireless over the last couple of years. Finally the class will wrap up with an open discussion driven by you, have your voice heard.

### **212 MASTERING NRI WORKSHOP**

**(1:00pm - 2:00pm)**

In the past we have discussed multiple ways to get data out of Chempax C/S. This year we will focus on the screen portion of the New Report Interface. The workshop will walk through changing the filter criteria to meet your needs. We will walk through adding tables and relationships to expand your filtering criteria.

### **213 CHANGE MANAGEMENT**

**(2:10pm - 3:10pm)**

During the week of Interaxions you will learn about many new ideas that you will want to implement when you return to the office. This class will provide some insight into the best ways to approach this task to be successful. Whether it be how best to put together a team or deciding it's best to have Datacor assist in the process, this class will review all options. Learning the exciting new features is just half the battle, successfully implementing it is where the true value is.

### **214 PLANT MAINTENANCE**

**(2:10pm - 3:10pm)**

This class will review the Plant Maintenance Module. In addition, there will be some hands-on learning. This class will have some initial beginner plant maintenance details but is really for someone who is familiar with Plant Maintenance but may not be using it yet.

### **215 THE POWER OF DATA WORKSHOP**

**(2:10pm - 3:10pm)**

Having data and being able to use the data are two different things. This workshop will take a firsthand look at some of the tools in Chempax C/S that will put the data at your fingertips. We will look at some classic examples from real support issues to show how finding data can be easy.

### **216 BATCH SCHEDULER / WORK CENTER SCHEDULER FORUM**

**(3:20pm - 4:20pm)**

Are you currently using the Schedulers in Chempax C/S? Do you want to? If so, this class is for you! Our Schedulers have matured and grown over the years. This class will discuss those changes, including the ease of use, enhanced drill downs, and new events that can be added. There will be time at the end of the class for a lively discussion on the Schedulers.

### **217 CHEMPAX C/S DIAGNOSTIC SESSION\***

**(3:20pm - 4:20pm)**

This lab session will be your interactive, hands-on look at the newest features of Chempax C/S. This will be your opportunity to try out the new functionality and spend some time with the Chempax C/S Team on your specific company issues. Bring your questions and have them answered in an intimate setting. In the past, this class has proven to be one of the most anticipated sessions of the conference.

### **218 CRYSTAL REPORTS FOR ADVANCED USERS WORKSHOP**

**(3:20pm - 4:20pm)**

This advanced class will focus on features you can use in custom reports or as additions to our standard NRI reports. We will discuss complex sorting, variables and exporting to Excel. While some similar topics from last year may be discussed, examples will be new to show various ways you can use these tools to your advantage. This course is designed for those classifying themselves as an advanced user.

## FRIDAY, MAY 18<sup>TH</sup>

### 301 WHAT'S NEW AND TOP TEN REQUESTS PART IV

*(8:30am - 9:30am)*

This session is a continuation of What's New and Top Ten Requests Parts I, II and III. While additional top ten items may be covered, we will also look to open the conversation. We want to hear from you about previous Top Ten items and how they were implemented and any other creative solutions that may have come from those items.

### 302 NEWYEAR, NEWYOU

*(9:40am - 10:40am)*

This interactive class will be talking about future technologies and Chempax C/S. We will cover some items we look to incorporate into the product in the next several years. We will also lead a discussion on what technologies you feel are important and would improve the software and your business. We would also love to hear about any recent integrations or creative solutions with Chempax C/S. Be ready for an exciting conversation.

### 303 PLATFORM DISCUSSION

*(10:50am - 11:30am)*

This final class will be an open forum to discuss and exchange ideas and wrap up our Interaxions conversation. We will solicit feedback from the community on what they learned during the week and what future enhancements they would like to see. Attendees can submit suggestions for discussion prior to the conference to [cs-support@datacor.com](mailto:cs-support@datacor.com). Please reference this class in the suggestion. Lastly, we ask that you please come prepared to discuss any support or development concerns.

## **WEDNESDAY, MAY 16<sup>TH</sup>**

### **107 CHEMPAX VB OPENING SESSION**

**(9:10am - 9:50am)**

The opening session will provide all ChempaxVB attendees an opportunity to learn about major new features across the Chempax modules.

### **108 INTRO TO ADMINISTRATION (VB.NET)**

**(10:00am - 10:40am)**

This session will be a seminar format and introduce you to the Administration module using the VB.NET interface.

### **109 INTRO TO POWER BI**

**(10:00am - 10:40am)**

This session will provide a hands on introduction to Microsoft's Business Intelligence (BI) offering. Using a workshop format, you'll have an opportunity to experience how this tool can be used to rapidly develop analytics from Chempax data.

### **110 INTRO TO INVENTORY CONTROL (VB.NET)**

**(10:00am - 10:40am)**

This session will be a workshop format allowing you to get hands on exposure to the Inventory Control module using the VB.NET interface.

### **111 INTRO TO QUALITY CONTROL (VB.NET)**

**(10:00am - 10:40am)**

This session will be a seminar format and introduce you to the QC module using the VB.NET interface.

### **112 ACCOUNTING FORUM**

**(10:00am - 12:10pm)**

This session will focus on topics specific to the AP, AR and GL modules in ChempaxVB.

### **113 USING CHEMPAX VB TO THE FULLEST - GROUP DISCUSSION**

**(10:50am - 12:10pm)**

Are you taking advantage of all that ChempaxVB has to offer? Most customers use a subset of features and miss out on literally hundreds of custom and specialty features. This session is intended to facilitate a broad discussion about ideas and experiences using such diverse features as location control, email events, screen customizations, VB.NET, document management, price change tracking, credit card sales, and many other topics. Since some of these will be covered in detail in later classes, you might want to use this class as an overview for the rest of the conference.

### **114 CHEMPAXVB.NET – INTRODUCTORY WORKSHOP\***

**(10:50am - 12:10pm)**

ChempaxVB.NET (a.k.a. DOTNET) is Dacor's next generation ChempaxVB product. ChempaxVB users have the option of installing DOTNET and using it together with the current ChempaxVB 6 product. The DOTNET interface presents Chempax data in a dynamic "business-centric" style which lets you look at your overall enterprise and then drill down to the part of the business that requires attention. ChempaxVB.NET also includes a growing list of updated versions of the data entry screens and reports. This workshop will give you an opportunity to experience this new interface that will continue to replace the current look and feel of the current ChempaxVB 6 product.

### **115 ANALYZING CHEMPAX DATA USING MS EXCEL WORKSHOP\***

**(10:50am - 12:10pm)**

If your job involves analyzing data, then you probably spend a good deal of your day using Microsoft Excel, and much of the data you analyze probably came from Chempax. This workshop will show you various ways to bring ChempaxVB data into Excel from the different available interfaces (ChempaxVB6 screens, ChempaxVB.NET screens and reports), and then explore various built-in analysis tools such as queries and pivot tables.

## WEDNESDAY, MAY 16<sup>TH</sup>

### 116 TRANSITIONING TO CHEMPAXVB.NET

(1:15pm - 2:15pm)

ChempaxVB.NET is the new and future face of the Chempax VB software, so configuring it and getting users in a position where they can comfortably perform their jobs is a process that all Chempax installations will need to do. This seminar will review the options for rolling out the new interface to your user base, along with the tools available to transition screen customizations, report definitions and user personalization from Chempax VB6 to ChempaxVB.NET. In addition to an overview of the features of the user interface and data entry screens, the class will look at examples of commonly performed lookups and tasks in Chempax VB6 and explore how to accomplish tasks in ChempaxVB.NET. The seminar will also detail the suggested system requirements for using ChempaxVB.NET, which do differ from the requirements for Chempax VB6.

### 117 UNDERSTANDING YOUR DATA WORKSHOP

(1:15pm - 2:15pm)

This workshop introduces users to the ChempaxVB database. We will explain some of the basic concepts of the Microsoft Access relational database and show you how you can extend the capabilities of ChempaxVB by working directly with the data. You will learn the basics of using queries and other features of Microsoft Access. We will also review tips and techniques specific to the most recent versions of MS Access. If you are new to ChempaxVB, or you are ready to look “under the hood”, this workshop is a must.

### 118 FINANCIAL STATEMENTS WORKSHOP

(1:15pm - 3:25pm)

ChempaxVB has a built-in financial report writer which can produce professional-looking income statements, balance sheets and other financial reports. Many customers gloss over this part of Chempax during the initial implementation, so this workshop will give you a chance to learn about the advanced formatting options and calculation functions. You will also get to see the recent improvements that have been made to the statement definition process including the use of wildcards for GL accounts and new VB.NET features.

### 119 CUSTOMER SERVICE FORUM

(1:15pm - 3:25pm)

This session will focus on topics specific to the Order Entry, Invoicing, Pricing and Sales Analysis modules in ChempaxVB.

### 120 CHEMPAX VB MOBILE APPS

(2:25pm - 3:25pm)

Let's face it: smart phones dominate our lives. Whether it's hailing an UBER or watching a movie, mobile apps have changed the way we do everyday tasks. Datacor has now joined the fray with our first offerings for iOS and Android: apps for Truck Delivery, Physical Inventory and Electronic Batch Tickets. This seminar will explore these in detail and provide an opportunity to discuss their implications for your business. We will also discuss our product development plans and give you a chance to provide input into future directions.

### 121 CHEMPAXVB.NET - ADVANCED WORKSHOP\*

(2:25pm - 3:25pm)

For those who have already started to use DOTNET, this will give you an opportunity to look at newly developed features, learn about more advanced features and discuss future directions directly with the developers.

### 122 INTERMEDIATE/ADVANCED MS ACCESS TECHNIQUES WORKSHOP

(3:30pm - 5:00pm)

If you are already familiar with MS Access tables and queries and you're ready for more, this workshop will show you how to further leverage the power of MS Access. We will show you how to create simple data update forms, crosstab queries, subforms and subreports, and other features which will allow you to extend the capabilities of Chempax.



## **WEDNESDAY, MAY 16<sup>TH</sup>**

### **123 NEW FEATURE TEST TRACK WORKSHOP \***

**(3:30pm - 5:00pm)**

If you would like to try out what you've learned, our workshop lab will be available for your use during two time slots: Wednesday afternoon from 3:30 to 5:00 for those not going to NYC or Friday morning from 9:40 to 10:40. We encourage you to stop by and try out features of Chempax that you've heard about in various classes. Members of the VB Team will be available to answer questions. Although the sessions will be informal, please sign up so that we know how many people are planning to attend.

### **124 CHEMPAX VB ONE-ON-ONE SUPPORT SESSIONS**

**(3:30pm - 5:00pm)**

This session is designed to provide attendees the opportunity to spend additional time with Chempax VB team members. This will be your chance to try out the newest features and have your specific company issues answered. We encourage you to bring your laptop or tablet device, but most importantly your questions and ideas that you would like to discuss. In the past, this class has proven to be one of the most anticipated sessions of the conference. In order to give everyone an equal opportunity to meet with the team, each company can only register for one time slot and should come together as a team.

## **THURSDAY, MAY 17<sup>TH</sup>**

### **219 LOGISTICS FORUM**

**(8:30am - 9:30am)**

This session will focus on topics specific to the Inventory Control, Purchasing, Safety and Resource Planning modules in ChempaxVB.

### **220 AR COLLECTIONS / CREDIT CARD PROCESSING**

**(8:30am - 9:30am)**

The tracking and analysis of customer credit status is an essential part of the Accounts Receivable process. ChempaxVB has an ever expanding set of tools available to help out, from Customer File creation through Order Entry and the debt collection process. In addition, ChempaxVB offers integrated credit card processing allowing you to process payments directly in Chempax. This seminar will walk you through the credit card offering and discuss how it can work in conjunction with the other tools available for managing your AR.

### **221 CATCHING UP WITH CHEMPAX**

**(8:30am - 9:30am)**

This seminar will review some of the new features that have been added to ChempaxVB in recent years that even long-time users might have missed. From brand new inquiries and reports, to useful tweaks to programs you might use every day, this seminar will help you get the most of ChempaxVB. We will also review how you can keep up to date with ChempaxVB changes on an ongoing basis back in the office, including receiving email notification directly from the ChempaxVB team when new features are made available.

### **222 CUSTOMIZING REPORTS IN ACCESS WORKSHOP**

**(8:30am - 10:40am)**

In addition to providing a repository of data, MS Access is one of the methods used to produce both standard and custom ChempaxVB reports. This workshop will show you how to customize any of these reports as well as use them as a starting point to create your own specialized versions. We will also show you the correct way to save and publish these reports so that they can be backed up and made available to your users.

### **223 PHYSICAL INVENTORY / CYCLE COUNTING**

**(9:40am - 10:40am)**

Although many companies count their inventory only once a year, ChempaxVB offers a number of useful options and features which can save you time and money and improve the accuracy of your counts. You might even consider counting more often once you've learned the advantages of doing so and what features are available in Chempax VB to facilitate cycle counting. This seminar will also include a discussion of options such as tag inventories, location control, and cost entry. We'll also demonstrate the new Mobile App offerings for IOS and Android that offers you even more ways to streamline your inventory process.

## **THURSDAY, MAY 17<sup>TH</sup>**

### **224 INVENTORY POSTING WITH PURCHASING AND AP**

**(9:40am - 10:40am)**

With the increased volatility in pricing, the need for accurately costing inventory has become a larger issue for many chemical companies. ChempaxVB includes features that allow for the simplification of the tracking of inventory costs and ensure that the different views, (Inventory, GL, Accounts Payable and Purchasing), are all in agreement. This seminar explains how to set up the Inventory GL Mapping and use it in conjunction with PO Receipts and AP voucher entry to achieve these objectives.

### **225 MANUFACTURERS FORUM**

**(9:40am - 10:40am)**

About half of the companies that attend Interaxions identify themselves as manufacturers. This seminar will provide an opportunity for attendees from these companies to focus on topics specific to their industry segment and will include the Top 10 lists for the BT and QC modules.

### **226 TOPICS FOR CHEMICAL DISTRIBUTORS - GROUP DISCUSSION**

**(10:50am - 11:50am)**

A large number of Chempax usage is by "factory pack" distributors. For these companies, the relationship with the suppliers they represent is just as critical as the relationship with their customers they sell to. As such, distributors have somewhat different purchasing, reporting and analysis requirements than other Chempax users. This session will provide an opportunity to focus on the needs of distributors and discuss how different Chempax users have managed the dealt with the unique requirements of this segment of the industry.

### **227 SALES ANALYSIS AND FORECASTING**

**(10:50am - 11:50am)**

Chempax VB offers a large number of reports and inquiries which allow for the analysis of sales and profit data. The available options range from detailed transaction reports, to summaries by month, month range or year, with a nearly endless number of subtotaling choices. This seminar will compare and contrast the various programs on the Invoicing and Sales Analysis menus to help you determine which are best matched to meet various sets of requirements. We will also explain the system custom options which affect sales and profit reporting, and explore options for entering forecast/budget figures and analyzing them versus actual sales.

### **228 DATABASE MAINTENANCE AND ARCHIVING**

**(10:50am - 11:50am)**

The MS Access database used by ChempaxVB doesn't require frequent attention, but as companies grow there is some amount of database maintenance required. This seminar will explain the various tools and procedures available for maintaining the ChempaxVB database, and will cover such topics as applying Chempax LiveUpdates, compacting and repairing, archiving, partitioning the database to manage growth, and diagnosing common problems.

### **229 CUSTOMIZING VB.NET REPORTS USING CRYSTAL REPORTS WORKSHOP**

**(10:50am - 11:50am)**

One of the new features of the ChempaxVB.NET reports is the ability to view a Crystal Reports version of the report output. In this workshop, users will be given the opportunity to gather hands-on experience on how to modify Crystal Reports. Users will gain knowledge on how to modify fields and labels. The creation of formulas in Crystal Reports will also be covered and how to add it to a new section of the report. Key differences between the design of Crystal Reports and Microsoft Access reports will be covered.

### **230 MATERIAL REQUIREMENTS PLANNING**

**(1:00pm - 2:00pm)**

MRP is an inventory discipline that helps you determine what to buy and what to make in order to meet current and anticipated demand. In the past, getting started with MRP was a time consuming and a resource intensive process, but now the ChempaxVB Resource Planning (RP) module has been fully updated and modernized in ChempaxVB.NET, allowing you to get started almost immediately. This course will explore the new RP setup process and analytical tools now available to help you better manage your inventory.

**THURSDAY, MAY 17<sup>TH</sup>****231 CONSOLIDATED CORPORATE REPORTING****(1:00pm - 2:00pm)**

Does your operation consist of multiple business entities that function independently? Are you looking for an easier way to generate consolidated financial statements? ChempaxVB offers different options for managing multiple business units and this seminar will demonstrate how you can produce consolidated financial reports under each scenario.

**232 OPTIMIZING THE SHIPPING PROCESS - GROUP DISCUSSION****(1:00pm - 2:00pm)**

Whether you use common carriers or your own fleet of trucks, getting product to the customer involves unique challenges which have sometimes been outside the main focus of ERP systems. ChempaxVB has a number of offerings that are aimed at addressing these challenges, including the Truck Run programs, integration with WIN Logistics, Fedex/UPS interfaces and the new Mobile Truck Delivery App. The session will provide an opportunity for an open discussion about how you are addressing the shipping process and what improvements you'd like to see.

**233 CUSTOMIZING SCREENS WORKSHOP****(1:00pm - 2:00pm)**

Chempax includes a vast array of options and shortcuts which allow users to change the appearance of Chempax screens. Some of these are cosmetic, such as screen colors and column layouts. Others, such as custom menus, favorites, tool-tips, custom help guides and Spanish language support, can greatly aid in productivity. Using the "Customize" button in ChempaxVB.NET, you can move and resize fields, add your own fields to screens, turn text boxes into drop down lists, and add your own validation rules. This workshop will allow you to explore both basic and advanced features. This workshop will give you an opportunity to learn about and practice using these features in both the ChempaxVB 6 and ChempaxVB.NET interfaces.

**234 DOCUMENT MANAGEMENT****(2:10pm - 3:10pm)**

This seminar will explore the features available for the storage and distribution of documents in ChempaxVB. We will look at the interfaces available for linking documents to ChempaxVB data, and options for automatically creating documents and linking them to various types of Chempax transactions. One area of focus will be the continuing enhancements to the distribution options for documents via Chempax, including the ability to add your own "stamp" to documents received from vendors in the form of PDFs.

**235 IMPLEMENTING BARCODING****(2:10pm - 3:10pm)**

The use of barcode scanners has continued to expand across the ChempaxVB user base. In this seminar, we will explore the latest developments in Chempax scanner programs and guide you through the steps needed to start using barcode scanners for operations such as physical inventory and location transfers. We'll also describe the more advanced features that customers are using such as automatic transfers to staging areas, printing of barcode labels at the receiving dock, real time cycle counting, and automated batch receiving.

**236 CHOOSING CUSTOM OPTIONS****(2:10pm - 3:10pm)**

Did you know that your copy of ChempaxVB has over 2,000 built-in custom options? Many of these are immediately available for your use by simply checking a box. This seminar will discuss some of the more popular, important and useful options and provide some guidelines whether and when to select them.

**237 CHEMPAXVB.NET – INTRODUCTORY WORKSHOP\*****(2:10pm - 3:10pm)**

ChempaxVB.NET (a.k.a. DOTNET) is Dacor's next generation ChempaxVB product. ChempaxVB users have the option of installing DOTNET and using it together with the current ChempaxVB 6 product. The DOTNET interface presents Chempax data in a dynamic "business-centric" style which lets you look at your overall enterprise and then drill down to the part of the business that requires attention. ChempaxVB.NET also includes a growing list of updated versions of the data entry screens and reports. This workshop will give you an opportunity to experience this new interface that will continue to replace the current look and feel of the current ChempaxVB 6 product.

## **THURSDAY, MAY 17<sup>TH</sup>**

### **238 CHEMPAX VB CUSTOMER MANAGEMENT WITH eCHEMPAX**

**(3:20pm - 4:20pm)**

This course will review different operating procedures that address the day-to-day events servicing customers. We will demonstrate how to utilize automation and technology within Chempax VB and eChempax to reduce the number of steps required to complete tasks such as: sending samples, processing returns, handling complaints, accessing SDS and COAs, distributing literature, price change requests and approvals, special lab requests and sending and tracking quotes.

### **239 ELECTRONIC INTERFACES**

**(3:20pm - 4:20pm)**

ChempaxVB has a growing number of options which allow you to exchange data electronically with other programs. This seminar will explain how to set up and use such features as email alerts, instant messaging, PDF creation, imports from EDI, ACH check disbursements, ACH invoicing, emailing of documents, integration with UPS and Fedex, AR Lockbox imports, Credit Card Processing, integration with Avatax from Avalara and integrated shipping with WIN Logistics.

### **240 WAREHOUSE MANAGEMENT - GROUP DISCUSSION**

**(3:20pm - 4:20pm)**

More and more customers have implemented location control and a number are using barcode scanners to streamline their operations. Some have gone a step further and are utilizing the cycle counting option which is built-in to scanner location control in ChempaxVB. This session will give you an opportunity to share your experiences with the ChempaxVB team and other ChempaxVB customers and to find out how others have incorporated new features into their warehouse management.

### **241 CHEMPAXVB.NET - ADVANCED WORKSHOP\***

**(3:20pm - 4:20pm)**

For those who have already started to use DOTNET, this will give you an opportunity to look at newly developed features, learn about more advanced features and discuss future directions directly with the developers.

## **FRIDAY, MAY 18<sup>TH</sup>**

### **304 ANALYZING CHEMPAX DATA USING MS EXCEL WORKSHOP\***

**(8:30am - 9:30am)**

If your job involves analyzing data, then you probably spend a good deal of your day using Microsoft Excel, and much of the data you analyze probably came from Chempax. This workshop will show you various ways to bring ChempaxVB data into Excel from the different available interfaces (ChempaxVB6 screens, ChempaxVB.NET screens and reports), and then explore various built-in analysis tools such as queries and pivot tables.

### **305 SAFETY: TRACKING HAZARDOUS MATERIALS, SDS, AND SARA TIER II**

**(8:30am - 9:30am)**

This seminar will explore features in Chempax associated with safety regulations, including: identifying reportable products, regulations for shipping documents, SDS tracking and distribution, SARA Tier II data collection, and related options for analysis and reporting.

### **306 END OF PERIOD PROCEDURES / FINANCIAL RECONCILIATION**

**(8:30am - 9:30am)**

Chempax VB's end of period processing is very forgiving. However, this can cause some problems. Fortunately, there are procedures that you should follow to avoid reconciliation nightmares and to maximize the available analysis tools. This seminar will include a review of the closing procedures for the Accounts Receivable, Accounts Payables, Sales, Inventory Sub Ledgers, and the GL. We will also demonstrate techniques for reconciling the sub ledgers to the GL.

### **307 ADMINISTRATIVE / IT FORUM**

**(8:30am - 10:40am)**

The Administration/IT Forum will cover topics involving Chempax maintenance and administration, including the Administration, File Maintenance and Constants menus. It will also provide an opportunity to discuss areas of IT that relate to Chempax, such as servers, remote access, printers, scheduled tasks, emailing, backup and recovery, etc.

## **FRIDAY, MAY 18<sup>TH</sup>**

### **308 MANAGING COST AND PRICE CHANGES**

**(9:40am - 10:40am)**

Due to rapidly changing financial conditions, much attention has been paid to the process of changing prices in ChempaxVB. This seminar will review the methods available to plan, implement and analyze price changes in Chempax, and show you how to let your customers know about planned price changes in an efficient and timely manner. We will also demonstrate some of the newer features, including customer/product margins and future pricing based on anticipated "replacement" cost.

### **309 INVENTORY TRACKING AND AGING**

**(9:40am - 10:40am)**

ChempaxVB provides a comprehensive set of tools for monitoring, valuing, tracking and locating your inventory and using it the most efficient way possible. This seminar reviews the various screens and reports available to help you keep track of your inventory and determine how its value has changed, utilizing both lot and location control. We will demonstrate the Lot Recall report and explain custom options that you can be using to automatically select your oldest lots when shipping finished goods or consuming raw materials.

### **310 NEW FEATURE TEST TRACK WORKSHOP\***

**(9:40am - 10:40am)**

If you would like to try out what you've learned, our workshop lab will be available for your use during two time slots: Wednesday afternoon from 3:30 to 5:00 for those not going to NYC or Friday morning from 9:40 to 10:40. We encourage you to stop by and try out features of Chempax that you've heard about in various classes. Members of the VB Team will be available to answer questions. Although the sessions will be informal, please sign up so that we know how many people are planning to attend.

### **311 CHEMPAX VB WRAP-UP**

**(10:50am - 11:30am)**

As the final session, the Wrap-up will provide an opportunity to discuss potential future directions for ChempaxVB, Datacor's services and Interaxions itself.



## WEDNESDAY, MAY 16<sup>TH</sup>

### 125 eCHEMPAX OPENING - PART I

*(9:10am - 10:30am)*

The opening sessions will feature a review and demonstration of changes and enhancements in eChempax, eChempax Traveler, and eChempax Mobile.

### 126 eCHEMPAX OPENING - PART II

*(10:40am - 12:00pm)*

This session is a continuation of eChempax Opening - Part I. It will feature a review and demonstration of changes and enhancements in eChempax, eChempax Traveler, and eChempax Mobile.

### 127 eCHEMPAX ADMINISTRATION, HOW DO I...?

*(1:15pm - 2:15pm)*

Find the answers to a variety of everyday eChempax Administration questions. For example, how do I...

- Manage users that have retired or left the company?
- Update the list of recipients for the contact change notification email?
- Review user activity?
- Review all user permissions at once?
- Give a sales agent access to a customer that is not explicitly assigned to them by sales agent code?
- See what my sales agent user sees?
- Address customer, supplier, product, codes that have been renumbered in Chempax?
- Change a password?
- Determine if the eChempax data is current?

### 128 eCHEMPAX RAPID FIRE

*(1:15pm - 2:15pm)*

A fast-paced rapid-fire session with multiple presenters covering three independent topics. Expect this class to move quickly:

- Using Chempax Documents in eChempax
- Search Tips & Tricks
- Options for Sample Tracking

### 129 PROJECTS AND SCORES

*(2:25pm - 3:25pm)*

Projects and Scores are two highly configurable features available to all eChempax customers. eChempax Projects can be used to track various internal projects such as product research and development, or any other job that may require collaboration, documentation, and recorded history. The Project form itself is designed primarily within eChempax Administration, giving you full control of content and behavior. Project topics will include:

- Project Setup
- Status & Permissions
- Project Categories
- Entering and Updating Projects
- Project Contacts
- Attachments
- Automatic Notifications

eChempax Scores are used to maintain and track sales attractiveness and relationship quality. Learn how to setup, maintain, and review scores for customers, prospects, suppliers, and contacts within eChempax and eChempax Traveler.

## WEDNESDAY, MAY 16<sup>TH</sup>

### 130 PRICE ANALYSIS, PRICE SHEETS, & UPDATING PRICES IN CHEMPAX

(2:25pm - 3:25pm)

A Price Sheet is a worksheet that is used to analyze and maintain detailed product pricing information for a specific customer or prospect. It can also be used to send a price change directly to Chempax, once approved by a manager. Learn more about price sheets and the tools that can be used to review and analyze pricing in eChempax:

- Price Book
- Customer Pricing
- Margin Views
- Price History
- Price Sheet Setup Options
- Price Worksheets
- Price Quotes
- Price Changes
- Approval Process
- Price Sheets & Chempax

### 131 eCHEMPAX DIAGNOSTICS\*

(3:30pm - 5:00pm)

Meet personally with members of the eChempax development group in a lab environment to discuss any questions that you may have about Dacor's Customer Relationship Management software. You are encouraged to bring your laptop or tablet device. This session is open to all attendees. We welcome those that currently use eChempax, and those that may be interested in taking a closer look at these products.

## THURSDAY, MAY 17<sup>TH</sup>

### 242 AN INTRODUCTION TO eCHEMPAX

(8:30am - 9:30am)

Today's fast-paced business environment requires an effective means to communicate and exchange information quickly and efficiently. Our unique and advanced eBusiness solution is eChempax, a state-of-the-art web application for customers, customer service, and your management and sales teams. eChempax is specially designed for the chemical industry, and constructed with the most current and reliable Internet technologies to ensure that the key elements of eBusiness are satisfied. Learn more about our comprehensive CRM application in this session that is intended for those less familiar with eChempax:

- Setup and Installation
- Data Synchronization
- Sales Force Automation
- Notes, Tasks, & Opportunities
- Prospect Tracking
- Scheduling
- Chempax Integration
- Customer Service

### 243 UNDERSTANDING & MANAGING E-MAIL IN eCHEMPAX

(8:30am - 9:30am)

eChempax includes numerous options that allow users to communicate with customers, prospects, suppliers, and co-workers using e-mail. eChempax also has the capability to generate and distribute e-mail notifications and reminders automatically. We will review all of these features, and learn more about the tools that are available to bridge the gap between the distribution of eChempax e-mail and Outlook. Topics will include:

- E-Mail Generated by eChempax
- Defining Recipients for eChempax E-Mail
- Outlook E-Mail, eChempax, and eChempax Traveler
- Note E-Mail to Customers, Suppliers, and Co-Workers
- Creating Mailing Lists in eChempax and eChempax Traveler
- Report & Document E-Mail
- Mail History
- Maintaining Valid E-Mail Addresses
- Troubleshooting Mail Delivery

## **THURSDAY, MAY 17<sup>TH</sup>**

### **244 TRACKING eCHEMPAX ITEMS TO CHEMPAX AND BACK**

**(9:40am - 10:40am)**

This session will focus on the eChempax items that can be used to update Chempax, which includes customer orders entered by sales agents and your customers, price changes, and contacts. We'll track each one from the time they are entered in eChempax, through the transfer/update process in Chempax VB and Chempax C/S, and back to eChempax.

### **245 WORKING WITH eCHEMPAX REPORTS**

**(9:40am - 10:40am)**

eChempax includes a Reports option that allows users to execute, view, and send a series of standard and custom reports. We will review the report architecture and processing, standard reports, form reports, and the steps that are necessary to begin writing your own reports:

- eChempax vs Chempax Reports
- The Importance of Report Names
- Setting Report Permissions
- Submitting a Report
- Price Quote Reports
- Downloading the eChempax Database

### **246 OPPORTUNITIES & SALES LEADS**

**(10:50am - 11:50am)**

Opportunities are an important part of the sales tracking process. They capture valuable details about sales leads, such as the customer or prospect, products, expected revenue and profit, the stage within the sales process, communications, and other information associated with potential business. Learn more about these eChempax features:

- Creating and Updating Opportunities
- Customizing Opportunities
- Creating Samples & Quotes
- Opportunity Tracking
- Pipeline and Post Sales Analysis

### **247 ADVANCED DATA ANALYSIS**

**(10:50am - 11:50am)**

A review of Microsoft Power BI, Microsoft Excel, and other advanced eChempax features that can be used to analyze your eChempax data.

### **248 USING NOTES & TASKS IN eCHEMPAX**

**(1:00pm - 2:00pm)**

Learn more about the eChempax Notebook, which provides a centralized location to efficiently share information about customers, prospects, suppliers and competitors.

- Entering and Updating Notes and Call Reports
- Task Management & Distribution
- Complaint Tracking
- Processing Sample Requests & Price Quotes
- Communicating with Notes
- Common Notebook Questions
- Customizing Notes to Fit Your Business
- Notes & Opportunities

### **249 AN INTRODUCTION TO eCHEMPAX TRAVELER & eCHEMPAX MOBILE**

**(1:00pm - 2:00pm)**

Out of the office? No Internet connection? No problem. Take your valuable business information with you, where ever you go. eChempax Traveler is a stand-alone windows application that works in unison with eChempax, offering access to customers, prospects, products, pricing, suppliers, notes, opportunities, call reports, schedules, and other data in a disconnected environment. It also includes options to exchange information with Outlook, import prospects from Excel, and generate more sophisticated mailing lists. We will provide a high-level, introductory review of its benefits and capabilities in the first 40-minutes of this session.

Traveling with just your phone? No problem. The second part of this session will focus on the setup and use of eChempax Mobile, a lite version of eChempax designed for the smaller screens on modern smart devices such as Android, iPhone, iPod, and Windows Phone. It offers real time access to customers, contacts, products, notes, sales history, orders, and more.

## THURSDAY, MAY 17<sup>TH</sup>

### 250 eCHEMPAX CUSTOMER PORTAL

(2:10pm - 3:10pm)

eChempax offers a secure and accessible portal that your customers can use to view product information (pricing, SDS, spec sheet), order status, invoices, A/R, and sales history. It also includes fully integrated order processing, where more than 6,000 orders are entered each month. This session will focus on the setup and operation of the eChempax Customer Portal, and how your business can take advantage of its timesaving features:

- Customer Setup & Security
- Entering Orders in eChempax
- Processing eChempax Orders in Chempax
- Account Information (Products, Pricing, Orders, Invoices, A/R, Sales)
- Order Notification & Confirmation
- Order Templates & Reminders
- Product Catalog

### 251 THE VIEW

(2:10pm - 3:10pm)

eChempax and eChempax Traveler offer an assortment of options and tools to view and analyze your data. Join us to learn more about these features in both applications. Topics are expected to include:

- Search, Sort, and Sub-Total
- Select and Customize Views
- Save, Share, and Use a Custom View
- Filter by Group
- Proximity Views
- Obscure Views
- Google Maps
- Column Formatting
- Group By

### 252 eCHEMPAX DIAGNOSTICS\*

(3:20pm - 4:20pm)

Meet personally with members of the eChempax development group in a lab environment to discuss any questions that you may have about Datacor's Customer Relationship Management software. You are encouraged to bring your laptop or tablet device. This session is open to all attendees. We welcome those that currently use eChempax, and those that may be interested in taking a closer look at these products.

## FRIDAY, MAY 18<sup>TH</sup>

### 312 ADVANCED eCHEMPAX TRAVELER

(8:30am - 9:30am)

This advanced class assumes a general working knowledge of eChempax Traveler, the stand-alone windows application that works in unison with eChempax, offering access to customers, prospects, products, pricing, suppliers, notes, opportunities, call reports, schedules, and other data in a disconnected environment. We will cover a variety of topics, including:

- Importing Prospects
- Outlook Integration
- Campaigns & Outlook
- Energy
- Advanced Search Techniques
- Chempax Documents

### 313 CONTACT MANAGEMENT & PROSPECT TRACKING

(8:30am - 9:30am)

This session will focus on contact management and prospect tracking, including the following:

- Contact Organization
- Contact Types
- Contact Free Fields
- Converting Prospects to Customers/Suppliers
- Export/Import (Excel, Outlook & eChempax Traveler)
- Contact E-Mail
- Prospect Notes & Opportunities
- Prospect Free Fields
- Adding, Changing, & Finding Contacts
- Prospect to Customer History & Analysis

## FRIDAY, MAY 18<sup>TH</sup>

### 314 eCHEMPAX SALES & MARGIN ANALYSIS

(9:40am - 10:40am)

Learn more about how sales data is structured in eChempax, and the tools that are available to analyze performance and profitability. Topics will include:

- Summary Dashboards
- Customizing Sales Views
- Sales Reports
- Troubleshooting Sales Discrepancies
- Exporting Sales Data
- Budgets
- Sales by Supplier

### 315 eCHEMPAX SYSTEM OPTIONS

(9:40am - 10:40am)

eChempax includes hundreds of system level options that control the general behavior of the application. We will review some of the more popular settings and discuss how they can impact the system and your business.

- Security
- Purchase Orders
- Lots (internal, external)
- Alerts
- Save Warnings
- Menu Options
- Administrator User Switch
- Inactive Items
- And More!

### 316 eCHEMPAX WRAP-UP

(10:50am - 11:30am)

As the final session, the Wrap-up will provide an opportunity to discuss potential future directions for eChempax, Datacor's services and Interaxions itself.