VISIBILITY

VISIBILITY CUSTOMER CONFERENCE 2027

GET WILD ABOUT VISIBILITY

Three days of product, process and people. Main stage sessions on the roadmap and where Visibility ERP is going, plus four Solutions Floor stations running hands-on training all day.

CONFERENCE AGENDA

May 3 – 5, 2027
Monday – Wednesday

LOCATION

Wild Dunes Resort
Isle of Palms, SC

SESSION GUIDE

- Palms Ballroom
- Finance
- Innovation, AI & Support Hub
- Manufacturing / Shop Floor
- Reporting & Automation

AT A GLANCE

MON	**Arrival & Welcome Reception**	Optional golf outing 10:00 AM · Reception 6:00 – 9:00 PM
TUE	**Keynote & Solutions Floor**	Opening keynote and roadmap · 16 station sessions
WED	**Solutions Floor**	20 station sessions across four tracks

Schedule subject to change. Open slots following each station session allow for continued discussion and Q&A at each station.

DAY 1 · MONDAY

ARRIVAL & WELCOME RECEPTION

TIME	SESSION / ACTIVITY	LOCATION
9:00 AM	**Visibility Golf Outing Check-In** Shuttle service runs from the hotel (Links Club House 1.5 miles from hotel) · Practice facilities open at the course	Links Club House
10:00 AM	**Visibility Golf Outing** · Optional (Advanced Registration Required)	Links Course, Wild Dunes
6:00 – 9:00 PM	**Welcome Reception** Buffet and station dinner, drinks and casual networking	Indigo Rooftop

BEFORE YOU ARRIVE

Bring the questions you want answered at a station. Every session leaves an open half hour for continued discussion.

SOLUTIONS FLOOR

Four stations run in parallel on both conference days. Move between them freely — nothing is ticketed.

WHO IS HERE

Sessions are led by the Visibility team who build, implement and support the product — no outsourced speakers.

DAY 2 EVENTS SCHEDULE

TIME	SESSION / ACTIVITY	LOCATION
8:00 – 9:00 AM	**Breakfast Buffet** · Near conference facilities	Tides Ballroom
9:00 – 10:00 AM	**Opening Keynote & Welcome Session** State of Visibility ERP · Product momentum · Product roadmap · Customer success spotlight	Palms Ballroom
10:00 AM – 12:00 PM	**Solutions Floor · Station Sessions** Four stations run in parallel — full grid on the next page	Palms Ballroom
12:00 – 1:00 PM	**Lunch** · Near conference facilities	Tides Ballroom
1:00 – 2:00 PM	**Partner Presentations**	Palms Ballroom
2:00 – 4:00 PM	**Solutions Floor · Station Sessions** Four stations run in parallel — full grid on the next page	Palms Ballroom
All Day	**Coffee / Tea / Water Station**	Networking Foyer

SOLUTIONS FLOOR

Each session runs 30 minutes and is followed by an open 30 minutes at the same station for continued discussion and Q&A.

TIME	MANUFACTURING, SHOP FLOOR & OPERATIONS	FINANCE	REPORTING, ANALYTICS & AUTOMATION	INNOVATION, AI & SUPPORT HUB
10:00–10:30	**Inventory Management Workshop** Kanban plus cycle and physical inventory — hands-on: teams take a bucket of items, count it in Visibility and post the result *Craig Crossley*	**Project Accounting** Tracking costs and revenue against jobs for long-cycle manufacturers *Patti Lennan*	**IQ Plus: Form Design with Examples** Building invoices, packing slips and work order travelers from real customer forms *Kendall Hulburt & Richard Challen*	**Using AI to Audit & Manage Roles, Permissions & Scheduling Jobs** Using AI to review user access and keep scheduled jobs running on time *Jason Ash & Michael Roma*
11:00–11:30	**Field Service** Managing service calls, technician dispatch and on-site work against customer equipment *Craig Crossley*	**Cost Accounting Deep Dive** Job costing, WIP, variance analysis and COGS in an MTO environment *Patti Lennan*	**SQL for Beginners** Reading the Visibility ERP database and writing your first queries *Kendall Hulburt & Richard Challen*	**Custom Project Review** PDC Grid & Custom Configurator *Michael Roma & Lloyd Perna*
12:00–1:00	LUNCH — TIDES BALLROOM			
2:00–2:30	**Engineering Change Control** Managing ECOs and BOM revisions from request through release *Steve Leadbeater*	**Bank Reconciliation and Cash Flow Statement Setup** Bank flows, cash flow statement setup and AP/AR management *Helen Pinkham*	**Business Intelligence Product Development** From OLAP to semantic and Power BI capabilities *Maddy Kitson*	**AI Workshop #1: Basics of Skills, MCPs and Agents** What skills, MCP servers and agents are and where each fits alongside Visibility ERP *Joseph Perna & Lloyd Perna*
3:00–3:30	**MRP Workshop: Setup & Parameters** Lead times, order policies, demand fencing, EOQ and forecasting — a rundown of the policy options, then a collaborative workshop to set them up and see the results live *Steve Leadbeater*	**Billing Plans, Prepayments, Deferred Revenue & Costs** Milestone and progress billing for ETO manufacturers *Helen Pinkham*	**Creating Power BI Dashboards with Visibility Business Intelligence** Connecting Power BI to Visibility BI and building dashboards step by step *Maddy Kitson*	**AI Workshop #2: Building Skills, MCPs and Agents, with Examples of Each** Hands-on build of a skill, an MCP connection and an agent, with working examples *Joseph Perna & Lloyd Perna*

DAY 3 EVENTS SCHEDULE

TIME	SESSION / ACTIVITY	LOCATION
8:00 – 9:00 AM	**Breakfast Buffet** · Near conference facilities	Tides Ballroom
9:00 AM – 12:00 PM	**Solutions Floor · Station Sessions** Four stations run in parallel — full grid on the next page	Palms Ballroom
12:00 – 1:00 PM	**Lunch** · Near conference facilities	Tides Ballroom
1:00 – 2:00 PM	**Partner Presentations**	Palms Ballroom
2:00 – 4:00 PM	**Solutions Floor · Station Sessions** Four stations run in parallel — full grid on the next page	Palms Ballroom
All Day	**Coffee / Tea / Water Station**	Networking Foyer

SOLUTIONS FLOOR

Each session runs 30 minutes and is followed by an open 30 minutes at the same station for continued discussion and Q&A.

TIME	MANUFACTURING, SHOP FLOOR & OPERATIONS	FINANCE	REPORTING, ANALYTICS & AUTOMATION	INNOVATION, AI & SUPPORT HUB
9:00–9:30	**PO Processing, Incoming Receipts, RTV, MRB & Inspection** The purchasing cycle from PO through receiving, inspection, MRB disposition and return to vendor *Steve Leadbeater*	**Moving to Multi-Entity** Adding entities, data migration, financial reporting and inter-entity transactions *Patti Lennan*	**Business Intelligence Workshop** Learn to write better reports with BI *Maddy Kitson*	**Server & Database Performance Monitoring with Prometheus & Grafana** Setting up monitoring and alerting to keep your Visibility ERP server healthy *Jason Ash & Michael Roma*
10:00–10:30	**Shop Routings & Production Scheduling** Work center and work station setup, plus a review of Schedule Advisor *Craig Crossley*	**Month-End/Year-End Close** AR/AP reconciliation and fiscal period close *Patti Lennan*	**Automating with Scheduling and Distribution** Automating calls to action and printing *Jason Ash & Joseph Perna*	**Workflow Automation** Setting up automated workflows and alerts so the next step happens without a reminder *Richard Challen & Lloyd Perna*
11:00–11:30	**Assembly Competition** Teams race through a simple assembly in Shop Floor Data Collection — clock in, read the instructions, complete the inspection, move tickets and post the production receipt. Winning team takes the prize *Craig Crossley*	**Finance Roundtable** Open discussion on anything the finance sessions raised *Patti Lennan & Helen Pinkham*	**Leveraging AI in Reporting** Using AI to draft queries, build reports and explain the results *Joseph Perna & Jason Ash*	**Auditing Roles and Permissions to Support Compliance** Reviewing who can see and change what, and documenting it for auditors *Steve Leadbeater*
12:00–1:00	LUNCH — TIDES BALLROOM			
2:00–2:30	**Workshop: Backflushing & Proportional Work Orders** Master these functions in a hands-on workshop setting *Steve Leadbeater*	**AR & Collections Management** Aging reports, cash receipts, credits and debit memos, plus the AR Invoice Email Grid *Patti Lennan*	**SQL for Advanced Users** Joins, subqueries, views and performance tuning against Visibility ERP data *Kendall Hulburt & Richard Challen*	**Label Printing Customer Examples** Label formats customers use today for parts, shipping and inventory, and how they were built *Joseph Perna*
3:00–3:30	**Inter-Entity POs & SOs** Buying and selling between your own entities with matching POs and SOs *Steve Leadbeater*	**Exchange Rate Revaluation** Foreign currency revaluation runs and financial statement impact *Helen Pinkham*	**IQ Plus: Data Driven Report Design** Designing IQ Plus reports that change content based on the data behind them *Kendall Hulburt & Richard Challen*	**Product Configurator Deep Dive** Building configurable products with rules, options and generated BOMs and routings *Craig Crossley*