



August 13-15, 2025
Gaylord Opryland Resort & Convention Center
Nashville, TN



Customer Connect 2025 Schedule

| Day 1 — August 13, 2025 — Arrivals, Event Registration, and Welcome Reception | | |
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| 1:00 PM- 7:00 PM | Registration Desk | Crystal Gazebo (located in the Garden Conservatory) |
| 5:00 PM- 7:00 PM | Welcome Reception | Crystal Gazebo (located in the Garden Conservatory) |
| Day 2 — August 14, 2025 — Customer Connect Conference and Group Activity | | |
| 7:00 AM- 8:00 AM | Breakfast | Water's Edge |
| 7:00 AM- 5:00 PM | Registration Desk | Lincoln CDE Foyer |
| 8:00 AM- 5:00 PM | Partner Showcase | Lincoln CDE Foyer |
| 8:00 AM- 5:00 PM | Customer Connect Conference | |
| | Application Learning Center | Lincoln A |
| | User Conference Meeting & Hands-On Training | Lincoln CDE |
| 12:00 PM- 1:00 PM | Luncheon & Corpay Presentation | Lincoln CDE |
| 6:00 PM- 10:00 PM | Grand Ole Opry Show – Group 1 | Grand Ole Opry |
| 5:30 PM – 10:00 PM | Casual Dinner Reception – Group 2 | Gaylord Resort / American Craft Tavern |
| Day 3 — August 15, 2025 — Training, Application Learning Center and Departures | | |
| 7:00 AM- 8:00 AM | Breakfast | Water's Edge |
| 7:00 AM- 12:00 PM | Registration Desk | Lincoln CDE Foyer |
| 8:00 AM- 12:00 PM | Partner Showcase | Lincoln CDE Foyer |
| 8:00 AM- 12:00 PM | Customer Connect Conference | |
| | Application Learning Center | Lincoln A |
| | Hands-On Training | Lincoln CDE |
| 12:00 PM | Conference Closes | |



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Customer Connect 2025 Agenda

Thursday, August 14, 2025

8:00 AM – 12:00 PM – Customer Connect Conference Meeting – Updates, Discussions and Solution Demonstrations

- Welcome to Customer Connect 2025
Client Services & Resources Updates and Customer Connect 2025
- eCMS v.4.2
Latest Modifications, Enhancements, and Development Efforts
- eCMS Accounting and Payroll
eCMS Payroll, Payroll Tax Tables, Tax Accounting and Accounting Updates

9:45 AM to 10:00 AM – AM Break (15 min)

- eCMS One (60 min) (Steve Gross)
eCMS One Demonstration, Discussions, and Q&A
- CGC + INRS Partnership / INRS Presentation

12:00 PM – 1:00 PM – Luncheon / CGC + Corpay Partnership / Corpay Presentation



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1:00 PM – 5:00 PM – Customer Connect Conference Meeting Continues - Hands-On User Training, Group Discussions

- eCMS IDI and BI&A Hands-On Training, Discussions, Demonstrations

IDI / Business Intelligence & Analytics Latest Enhancements
Interactive Data Inquiry Overview, Tips and Tricks, Latest Enhancements
Advanced Analytics Report Writing
Grid Report Notification
Labor Productivity Report

3:00 PM - 3:15 PM – PM Break (15 min)

Project Income Statement Forecasting
New Monthly Forecasting Feature within PISF

- CGC + Onware Partnership / Onware Presentation

Onware BI&A and AI Solutions for eCMS ERP
Client Case Studies/Success Stories
Demonstration, Discussions and Q&A



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Friday, August 15, 2025

8:00 AM – 12:00 PM – Customer Connect Conference Meeting Continues - Hands-On User Training, Group Discussions

- eCMS ERP Applications Hands-On Training, Discussions, Demonstrations

Bank Account Reconciliation Program
Mobile Purchasing Requisition Application
Manpower Scheduler

New Imports into eCMS
Selecting Invoices for Payment

10:00 AM – 10:15 AM – AM Break (15 min)

- eCMS Content Management, Forms and Workflow Applications Hands-On Training, Discussions, Demonstrations

Forms
Content Management & Workflow
Advanced Workflow Functionality



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Customer Connect 2025 Detailed Program Overview

| Time | Program Information | Presenter(s) |
|--|--|-----------------|
| August 14, 2025 8:00 AM - 8:15 AM (15 min) | Program Title: Welcome to Customer Connect 2025 Client Services & Resources Updates and Customer Connect 2025 | Jennifer Spragg |
| | Program Description: This session will provide a comprehensive overview of the many resources available to CGC clients that are designed to enhance their use of eCMS and contribute to their long-term success. Attendees will explore the CGC Portal and its wide range of integrated tools, learn how to access and utilize the CGC Customer Support Site, and gain insight into the CGC University Program for continued education. The session will also highlight the role and benefits of the PAG Forums, upcoming user conferences, and additional engagement opportunities. By the end of the session, participants will be fully informed and equipped to take advantage of the full spectrum of support, training, and community resources offered by CGC. | |
| | Learning Objectives: By the end of this session, participants will be able to: <ul style="list-style-type: none">• Navigate the CGC Portal and identify key tools available within the portal.• Access and utilize the CGC Customer Support Site for technical assistance.• Know how to leverage the after-hours support assistance.• Describe the purpose and benefits of the CGC University Program and PAG Forums.• Discover upcoming user conferences and engagement opportunities to support their continued education of CGC's products and services and engage in community collaboration. | |
| | Prerequisites: Access to CGC Portal and Customer Support Site | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |

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| August 14, 2025 8:15 AM – 9:15 AM (60 min) | Program Title: eCMS v.4.2 Latest Modifications, Enhancements and Development Efforts | Jon Bruce Darlene Moore |
| | Program Description: This presentation will provide a detailed overview of the latest enhancements in eCMS v.4.2 applications. This session will showcase how these advancements are now readily accessible, these are designed to boost productivity, streamline workflows, and provide deeper visibility into your financial and operational performance. | |
| | Learning Objectives: After attending this session, participants will be able to: <ul style="list-style-type: none"> • Learn about the new features, mods and enhancements introduced in the latest eCMS v.4.2 release and how to use them for their organizations. • Evaluate which modifications or enhancements meet the needs of their specific organizations and those can help their organizations with their company goals. • How to relate these newly available features and functionality to gain greater insight into financial and operational performance for their organizations. | |
| | Prerequisites: Basic understanding of eCMS menu and applications. | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |



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| August 14, 2025 9:15 AM – 9:45 AM (30 min) | Program Title: eCMS Payroll and Human Resources | James Carroll |
| | Program Description: Payroll Tax Table Import, Payroll Distribution Master Adjustments (D), New Davis Bacon Weekly Certified Forms, WH-347, Prevailing Wage Davis Bacon Code 3, No Tax on Overtime Premium, Secure 2 Act: Catch-Up for Ages 60 to 63 and Higher. | |
| | Learning Objectives: <ul style="list-style-type: none">• After attending this session will be able to apply knowledge for using the above features. | |
| | Prerequisites: Basic understanding of eCMS Payroll, HR and Accounting Applications | |
| | Advanced Preparation Requirements: None (Access to eCMS v.4.2) | |
| | CPE Level: Intermediate | |

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| August 14, 2025 10:00 AM – 11:00 AM (60 min) | Program Title: eCMS One | Steven Gross |
| | Program Description: Discover the latest in our next generation ERP system eCMS One. | |
| | Learning Objectives: Participants will learn about the capabilities and benefits of eCMS One. After attending this session, participants will leave with a better understanding of what eCMS One is: <ul style="list-style-type: none"> • The depth and breadth of the system • What specific functions it will provide • How easy it is to use • How scalable it is, with its ability to support contractors large and small | |
| | Prerequisites: Basic understanding of eCMS applications | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |

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| August 14, 2025 11:00 AM – 12:00 PM (60 min) | Program Title: Project Management Doesn't Have to be Like Root Canal | Chris Wright |
| | Program Description: A construction company with an inefficient or outdated project management system can waste thousands of labor hours costing millions of dollars. Confusing change orders, communications delays, and inaccurate project data are only a few of the problems. How much more control would you have with real-time cost visibility? What if the silos were removed between your teams? What if data entry could be easily made between field and office? Bet your life (and bottom line) would be better. During this session, representatives from two of the country's most successful construction companies will tell you the results of elevating their project management systems. Presented by INRS Enterprises and guests from J.F. Brennan Company and JP Cullen. | |
| | Learning Objectives: By the end of this session, participants will be able to: <ol style="list-style-type: none"> 1. Identify the key operational inefficiencies in traditional or outdated construction project management systems, including challenges with change orders, communication gaps, and data inaccuracies. 2. Explain the business impact of real-time cost visibility and integrated field-to-office data entry on project outcomes and profitability. 3. Evaluate the benefits of breaking down silos between project stakeholders to improve collaboration, speed, and accuracy. 4. Assess real-world strategies and results shared by J.F. Brennan Company and JP Cullen, including how upgrading their project management approach led to measurable improvements. 5. Apply lessons learned from peer experiences to consider improvements in their own project management workflows and technology use. | |
| | Prerequisites: None | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |



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| August 14, 2025 12:00 PM – 1:00 PM (60 min) | Program Title: Check Please! Getting That Receipt — and Your Invoice Payments — Digitized with eCMS | Grant Cowles |
| | Program Description: Missing receipts and lost checks—sound familiar? Paper receipts and checks slow your billing and payments, cause confusion, and historically, it has been very hard to find a solution to integrate with eCMS. Corpay’s fully integrated eCMS tools, including AP automation, commercial cards, and expense management, help construction firms cut down on paperwork, reduce misuse and fraud, and control spending. Join our session to see how Corpay's partnership with eCMS reduces risk and gives you full visibility into every dollar moving through your firm — without disrupting your current workflows. | |
| | Learning Objectives: After attending this session, participants will be able to: <ul style="list-style-type: none">• Understand industry statistics and trends relating to construction payments• Identify areas of paper-based inefficiencies in payment operations• Learn best practices and technology opportunities to improve processes• Learn about eCMS’ pre-built options for digitization• See examples and hear from other peers about their solutions | |
| | Prerequisites: None | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |



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| August 14, 2025 1:00 PM – 3:45 PM (165 min) | Program Title: eCMS IDI and BI&A Hands-On Training, Discussions, Demonstrations | Darlene Moore Jon Bruce |
| | Section 1 – IDI / Business Intelligence & Analytics Latest Enhancements Program Overview: During this training session, I, as the presenter, will demonstrate some of the latest features as well as how to use the Web2 IDIs in eCMS to generate IDI listings of multiple master records and reports. The attendees will be shown how to successfully navigate the system, add and remove fields, and how to export data into Excel, .PDF, .XML, or a .CSV file format. Learning Objectives: The learning objectives for this class are for the users to walk away with an in-depth knowledge of how to navigate and use the tools available within the system to display various IDI views. They will hear about some of the latest enhancements to the IDIs and how to export data. Prerequisites: The attendees will need to have XCIPIO security and a general knowledge of how the eCMS application menus are organized. Advanced Preparation Requirements: Access to eCMS and Web 2 Tools CPE Level: Intermediate | |
| | Section 2 – IDI / Overview, Tips and Tricks, Latest Enhancements Program Overview: During this training session, using a few tips and tricks- I will demonstrate how to further transform a Custom IDI into a more favorable view by ridding some of those unfortunate issues we often experience when we add and remove fields. Learning Objectives: The learning objective for this class is for the users to walk away with an in-depth knowledge of how to create more desirable custom IDI views using some simple, easy to remember, tips and tricks. Prerequisites: The attendees will need to have XCIPIO security access and a general knowledge of the eCMS applications. Advanced Preparation Requirements: Access to eCMS and Web 2 Tools CPE Level: Intermediate | |

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| | <p>Section 3 – Advanced Analytics Report Writing</p> <p>Program Overview: During this training session, I, as the presenter, will demonstrate how to further transform a Custom IDI view into an Advanced Analytics Report using shading, color, lines, and more thereby further customizing the finished report to the user's choosing.</p> <p>Learning Objectives: The learning objective for this class is for the users to walk away with the knowledge of how to successfully raise the appearance and informational level of their customized IDI views to an Advanced Analytics Report that will provide a clearer and more concise look at their data.</p> <p>Prerequisites: The attendees need XCIPIO security access, general knowledge of how the eCMS application menus are organized, and basic knowledge of Excel function and formatting.</p> <p>Advanced Preparation Requirements: Access to eCMS and Web 2 Tools</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Section 4 – Grid Report Notification</p> <p>Program Overview: During this training session, I, as the presenter, will demonstrate how to configure the system to automatically distribute their newly created Advanced Analytics Report on demand or on a defined schedule.</p> <p>Learning Objectives: The learning objectives for this class are for the users to walk away with an in-depth knowledge of how to configure the system to automatically distribute their Advanced Analytics Reports using a pre-defined schedule to meet their business needs.</p> <p>Pre-requisites: The attendees need XCIPIO security access and a general knowledge of the eCMS applications.</p> <p>Advanced Preparation Requirements: Access to eCMS and Web 2 Tools</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Section 5 – Labor Productivity Report</p> <p>Program Overview: During this training session, I will demonstrate how to use the Web2 IDIs in eCMS to create a customizable Labor Productivity Report in multiple views, save the view, print and then export the data to Excel, .PDF, .XML, or .CSV file format.</p> <p>Learning Objectives: The learning objective for this class is for the users to walk away with an in-depth knowledge of how to select from a long list of data fields to create a customized IDI Labor Productivity report that is meaningful to their business. Users will also see how to print and export the data from the IDI.</p> <p>Pre-requisites: The attendees need to have XCIPIO security access and a general knowledge of how the eCMS application menus are organized, and basic knowledge of Excel function and formatting.</p> <p>Advanced Preparation Requirements: Access to eCMS and Web 2 Tools</p> <p>CPE Level: Intermediate</p> | |
| | <p>Section 6 – Project Income Statement Forecast (PISF)</p> <p>Program Overview: This session will be focused on using the PISF feature in Job Cost for WIP Reporting. It will reveal the new monthly backlog feature that was released early this year, 2025.</p> <p>Learning Objectives: You will be able to start using the PISF function to create Under/Over Billings by Project. In addition, you will be able to use the new monthly backlog feature to record & Report on estimated project activity in the coming 2 years. You should also be able to create custom WIP reporting using the Income Forecast Inquiry feature.</p> <p>Prerequisites: General eCMS Job Cost knowledge</p> <p>Advanced Preparation Requirements: Access to eCMS and Web 2 Tools</p> <p>CPE Level: Intermediate</p> | |

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| August 14, 2025 4:00 PM – 5:00 PM (165 min) | Program Title: Using Construction Data in AI Agents: Practical Strategies with Job Cost Analysis | Fraser Gallop |
| | Program Description: In this session we explore how to leverage construction job cost data to build and deploy AI agents. We'll cover dataset setup and cleaning, building data warehouses, and integrating conversational AI tools to analyze job cost information. Attendees will see tools from Salesforce—including AgentForce, Tableau, and Data Cloud—and their Microsoft equivalents. Real-world examples from Onware's data warehousing work will demonstrate how to make your data clean, accessible, and AI-ready. | |
| | Learning Objectives: After attending this session, participants will be able to: <ul style="list-style-type: none"> • Understand best practices for preparing and cleaning construction job cost data for AI applications • Learn how to architect and implement an AI agent that ingests and analyzes job cost datasets • Explore conversational AI techniques for querying and interpreting project cost information • Examine support-agent use cases for handling inquiries via a construction project portal • Review of real-world data warehousing implementations by Onware | |
| | Prerequisites: None | |
| | Advanced Preparation Requirements: None | |
| | CPE Level: Basic | |



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| August 15, 2025 8:00 AM – 12:00 PM (225 min) | Program Title: Content Management, Workflow, Forms and Custom Apps | Darlene Moore Jon Bruce |
| | Section 1 – Bank Reconciliation (New Web2) Program Overview: This session will focus on creating a bank reconciliation using the new Web2 Bank Rec application. It will be shown how to import bank transactions and reconcile them to records from within eCMS. The end product will be a Bank Reconciliation Report. Learning Objectives: This session should teach eCMS Users how to set up the new bank Rec feature on a Web2 menu and create a monthly Bank Rec. You will be able to pull in relevant eCMS transactions and match them to the imported Bank transactions. Finally, you will be able to generate a Bank Rec report that shows outstanding reconciling items. Prerequisites: General knowledge of Bank Reconciliations and how they work as well as general knowledge of IDIs and how they work. Advanced Preparation Requirements: Access to eCMS and Web 2 Tools CPE Level: Intermediate | |
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| | Section 2 – Mobile Purchasing Requisition App Program Overview: This will be a live Demonstration of the eCMS Purchase Requisition Application and its functionality including the routing of the Requisition through a user defined Workflow. Learning Objectives: You will be able to create material requisitions that result in the creation of a Purchase order or multiple Purchase Orders. You will learn how to set up this application and modify your views to your preferences. Lastly you will learn how to link the Purchase Req to a workflow Prerequisites: General Knowledge of Material Requisitions and Purchase Orders Advanced Preparation Requirements: Access to eCMS and Web 2 Tools CPE Level: Intermediate | |
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| | <p>Section 3 – Manpower Scheduler App</p> <p>Program Overview: This will be a demonstration of the Web2 Manpower Scheduler. It will show how to Schedule Project Resources while preventing resources from being scheduled to more than 1 project at a time.</p> <p>Learning Objectives: You will learn how to create this application on your menu and setup your project resources, mainly Employees and Equipment. You will also learn how the scheduling process works and how to create a report for project management showing them the resources that have been assigned to their projects.</p> <p>Prerequisites: General Web2/IDI Knowledge</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Section 4 – New Imports into eCMS</p> <p>Program Overview: During this training session, I, as the presenter, will demonstrate how to utilize the Web2 Apps to import data from outside sources into multiple eCMS applications such as, Job Cost, Payroll, Equipment, and T&M.</p> <p>Learning Objectives: The learning objectives for this class are for the users to learn about the new features and functionality in the Web2 Import Menu and learn how it allows them to easily import and update master records within multiple eCMS applications.</p> <p>Prerequisites: The attendees need XCIPIO security access to the Web2 Import Applications and have a basic knowledge of how to import data. It will also be helpful for the attendees to know how your company currently handles importing data from external sources.</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Session 5 – Importing AP Pay Select</p> <p>Program Overview: During this training session, I, as the presenter, will demonstrate how to use the eCMS A/P Pay Select by Invoice Template to import data into eCMS to create AP Pay Selection by using a spreadsheet.</p> <p>Learning Objectives: The learning objective for this class is for the users to walk away with an in-depth knowledge of how to use the AP Pay Select by Invoice template as an alternative way to select invoices for payment.</p> <p>Prerequisites: The attendees need to have security access and basic knowledge of the AP invoice payment process and how the Import application works.</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Session 6 – Forms</p> <p>Program Overview: This session will provide Instruction on building Web2 Forms in eCMS. It is geared towards beginner form builders to create forms and route them for approval. These forms can be stand alone or actually integrate with eCMS updating tables within your ERP System.</p> <p>Learning Objectives: You will gain a basic knowledge of creating forms by adding and configuring fields so that a form can be easily created and routed within eCMS to the appropriate persons. You will learn how to link your form to a workflow that can update eCMS with its form data when approved.</p> <p>Prerequisites: You will need a basic knowledge of eCMS</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |
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| | <p>Session 7 – Content Management & Workflow</p> <p>Program Overview: This session will provide a general instructional Overview of how the A/P Invoice Register is set up and functions. This will also provide general instruction on setting up and using workflows to route invoices for approval. Some of the more recent features of Content Management will be shown.</p> <p>Learning Objectives: You will be able to set up and use the eCMS A/P Invoice Register and set up your own workflows. You will learn about and know how to use the recent feature additions to CM.</p> <p>Prerequisites: General Knowledge of eCMS Account Payable and your internal invoice routing process.</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |
| | <p>Session 8 – Advanced Workflow</p> <p>Program Overview: During this training session, I, as the presenter, will demonstrate how to configure the Workflow Rules settings to automatically approve an invoice as normal but then automatically put it on hold when necessary. We will also cover how to use the Reroute event to close the current workflow item and open a new one.</p> <p>Learning Objectives: The learning objectives for this class are for the users to walk away with an in-depth knowledge of how to successfully configure the new workflow events in Content Management to Approve and Hold an invoice or end a current workflow and trigger a new one to re-route an invoice for approval when needed.</p> <p>Prerequisites: The attendees need eCMS and XCIPIO security access to Content Management and Workflow. They will also need general knowledge of how the A/P invoice approval using the Content Management and Workflow applications works.</p> <p>Advanced Preparation Requirements: None</p> <p>CPE Level: Intermediate</p> | |

CPE Levels

- **Basic:**
This level is designed for CPAs new to a specific skill or area, or for those with limited prior exposure, even if they have experience in other areas.
- **Intermediate:**
This level builds upon the basic level, suitable for CPAs with more detailed knowledge and who may be in mid-level positions with some supervisory or operational responsibilities.
- **Advanced:**
This level is for CPAs with significant expertise in a particular subject, focusing on in-depth knowledge, skill development, and broader application of the topic.
- **Update:**
This level focuses on new developments, changes in regulations, or emerging trends within a specific field, keeping CPAs current with the latest information.
- **Overview:**
This level provides a broad survey of a subject area, often for those needing a general understanding or a refresher on a topic.