



## 2022 User Conference – AGENDA

*Empowering Minds. Building Partnerships.*

### Monday, June 13

<b>7:00am - 4:00pm</b>	Registration	<b>LOCATION</b>	
<b>8:00am - 9:00am</b>	Breakfast - Capitol Ballroom 1 & 2		
<b>8:00am - 4:00pm</b>	Exhibits and LTI HUB		
<b>9:00am - 12:00pm</b>			
	A. ASPIRE Admin Training Part 1 System	Dodge/Douglas	
	B. Advanced Guide to LeasePlus	Capitol Ballroom 1	
	C. Documentation: DocuSign	Capitol Ballroom 3	
	D. ASPIRE Modules/Partners	Capitol Ballroom 4	
<b>12:00 – 1:00pm</b>	Lunch - Capitol Ballroom 1 & 2		
<b>1:00pm – 4:00pm</b>			
	E. ASPIRE Admin Training Part 2 System	Dodge/Douglas	
	F. LeasePlus Best Case Practices	Capitol Ballroom 1	
	G. Bank Funding	Capitol Ballroom 3	
	H. Portfolio Reconciliation	Capitol Ballroom 4	
<b>5:00pm – 7:00pm</b>	Cocktail Hour – Hotel with Exhibitors		

### Tuesday, June 14

<b>8:00am - 4:00pm</b>	Registration, Exhibits, and LTI HUB		
<b>8:00am - 9:00am</b>	Breakfast - Capitol Ballroom 1 & 2		
<b>9:00am – 10:30am</b>	<b>General Session</b>	Capitol Ballroom 2	
<b>10:30am – 10:45am</b>	Break		
<b>10:45am – 12:00</b>	Product Roadmap	Capitol Ballroom 2	
<b>12:00 – 1:00pm</b>	Lunch - Capitol Ballroom 1 & 2		
<b>1:00pm – 4:00pm</b>			
	I. ASPIRE Beginner User Part 1	Dodge/Douglas	
	J. LeasePlus Best Case Practices	Capitol Ballroom 1	
	K. Integrating with ASPIRE	Capitol Ballroom 3	
	L. MS Dynamics Great Plains	Capitol Ballroom 4	
	Open Night – Enjoy Omaha!		

### Wednesday, June 15

<b>8:00am - 9:00am</b>	Breakfast - Capitol Ballroom 1 & 2		
<b>8:00am - 1:00pm</b>	Exhibits and LTI HUB		
<b>9:00am – 12:00 pm</b>			
	M. ASPIRE Beginner User Part 2	Dodge/Douglas	
	N. Advanced Guide to LeasePlus	Capitol Ballroom 1	
	O. Let's Dig into the Customer Portal	Capitol Ballroom 3	
	P. User Set Up & Security	Capitol Ballroom 4	
<b>12:00pm – 1:00pm</b>	Lunch – Capitol Ballroom 1 & 2		
<b>1:00pm – 3:00pm</b>			
	Q. Originations Roundtable	Capitol Ballroom 2	
<b>5:00pm – 9:00pm</b>	Closing Dinner Reception – 1912 Benson – bus transportation		

## BREAKOUT SESSIONS - OVERVIEW

Session	Title	Overview/Description
Mon <b>A</b>	ASPIRE Admin Training System Part 1	In this session, users will be taken through all of the configuration options available in ASPIRE. Whether you are a new user or an experienced system administrator this session will benefit you.
Mon <b>B</b>	Advanced Guide to LeasePlus	This session is going to highlight some of the hidden features and functions in LeasePlus that will hopefully make your day-to-day work in LeasePlus more efficient. There will be ample time to ask your LeasePlus subject matter experts questions.
Mon <b>C</b>	Documentation: DocuSign	Explore the possibilities of digital signatures in our digital age. In this session, you will review the capabilities and configuration of the LTi integration with DocuSign.
Mon <b>D</b>	ASPIRE Modules/Partners	Are you leveraging all the capabilities offered by the ASPIRE platform? In this session, you'll learn about the features and benefits of the valuable ASPIRE modules and integrations.
Mon <b>E</b>	ASPIRE Admin Training System Part 2	In this session, users will be taken through all of the configuration options available in ASPIRE. Whether you are a new user or an experienced system administrator this session will benefit you.
Mon <b>F</b>	LeasePlus Best Case Practices	This session will provide tips and advice on how to use LeasePlus to achieve maximum results. Practical use application on a variety of topics will demonstrated and some newer functionality that might have gone unnoticed will be highlighted.
Mon <b>G</b>	Bank Funding	Syndications are a part of all lenders tool sets. In this session, users will learn the capabilities within ASPIRE to Sell, Assign and Participate contracts to/with other lending partners.
Mon <b>H</b>	Portfolio Reconciliation	Know your Balance Sheet. Tips and Tricks to assist with your ASPIRE portfolio reconciliation.

Tues <b>I</b>	ASPIRE Beginner User Part 1	How do I ... ? In these sessions, users will be taken through standard functions of ASPIRE from initial origination through credit, documentation, booking, invoicing, cash receipts, month-end and termination processes.
Tues <b>J</b>	Advanced Guide to LeasePlus	This session is going to highlight some of the hidden features and functions in LeasePlus that will hopefully make your day-to-day work in LeasePlus more efficient. There will be ample time to ask your LeasePlus subject matter experts questions.
Tues <b>K</b>	Integrating with ASPIRE (API)	Seamlessly integrate your originations with ASPIRE. In this session, we will explore the use of the ASPIRE API and how data can be effortlessly transferred to and from ASPIRE.
Tues <b>L</b>	MS Dynamics Great Plains	Introduction to MS Dynamics Great Plains. This session is designed for new or novice users the Great Plains general ledger and accounts payable systems and will review systems usages and functions.

Wed <b>M</b>	ASPIRE Beginner User Part 2	How do I ... ? In these sessions, users will be taken through standard functions of ASPIRE from initial origination through credit, documentation, booking, invoicing, cash receipts, month-end and termination processes.
Wed <b>N</b>	LeasePlus Best Case Practices	This session will provide tips and advice on how to use LeasePlus to achieve maximum results. Practical use application on a variety of topics will demonstrated and some newer functionality that might have gone unnoticed will be highlighted.
Wed <b>O</b>	Let's Dig into the Customer Portal	Knowledge is POWER! In this session we will review the capabilities and configuration requirements for the new ASPIRE Customer Portal.
Wed <b>P</b>	User Set Up & Security	Ensuring effective system access while maintaining segregation of duties is a must for a successful compliance audit. In this session, we will explore the options available when configuring new users in ASPIRE and the associated security settings and reporting that is available.

<p>Wed</p> <p>Q</p>	<p>Originations Roundtable</p>	<p>Whether you originate directly to borrowers or work with partners like vendors and brokers to originate business, an integral part of the customer experience is the journey of each new financing opportunity. It's the first part of a hopefully recurring customer journey where you can deliver on customer needs and make customers want to work with you again and again; no wonder finance companies spend so much time and effort imagining and reimagining their Originations process to optimize the customer experience and, hopefully, achieve financial goals.</p> <p>From intake of new financing opportunities to pre-booking and everything in between, there are no shortage of conundrums to keep even the most productive problem solver constantly busy:</p> <ul style="list-style-type: none"> <li>• trying to figure out how to get our origination partners to send you more of the opportunities that fit your profile</li> <li>• attempting to get your sales and operations superstars more time to focus on value-add activities</li> <li>• working to break down the barriers of communication between you and your origination partners and customers</li> </ul> <p>No matter what technology, tools, systems, or processes you currently use, you won't want to miss this discussion with your peers and the LTI team on the top challenges in equipment finance originations!</p>
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