



SDS Touch Base Tuesday Agenda

March 23 2021

Presenter: Kim w/ Guest Leslie

1. Trending Topics:

- ✓ How to delete Employee Contracts not needed?
- ✓ How to enter Revenue Budget?
- ✓ How to remove a PO that will not be paid?
- ✓ How to Reclassify an Invoice, Deposit or Payroll Transaction?
- ✓ How to change a Cash Receipt Description?
- ✓ How to change an Activity Date?

2. Enhancements and News:

- ✓ Wisconsin On-boarding Process to WISEdata Finance

3. Looking Forward:

- ✓ **Attention Illinois Users:**
 - Check your Inbox, last week we sent information regarding SDS Setup for Gemini Reporting.
 - Please read through the information carefully.
 - If you have previously volunteered, please review the Prep Steps again and follow the “What’s Next” Steps.
 - For those who are new to the Prep Steps Process for Gemini Setup, please read through the email and complete the steps.
 - Keep in mind that Gemini Reporting goes LIVE in July of 2021. It is imperative that this work be completed by May.
 - Free Gemini TRS Course in SDS University with all the details, documents and videos. [Click Here to Register for Free](#) (*Note: When viewing in SDS University, please scroll to the bottom for the video.*)
- ✓ **Annual Conferences (REGISTER TODAY, EVENT PACKAGE SAVE 20%)**
 - June 3rd – Kick Off Conference
 - September 9th – Joint Annual Conference – Day One (Includes All States)
 - September 10th – State Specific Annual Conference – Day Two (Time slots for each state to cover state reporting)
 - October 7th – SDS Reporting Conference
 - November 18th – Masterclass
 - REGISTER = [Click Here to Register Today](#)



✓ **Events We Are Attending**

- April 20 - 22, 2021 - 82nd Annual MSBO Conference -Virtual
- May 19 - 21, 2021 - 68th Annual Colorado ASBO, Westminster, CO – In person
- June 9 - 11, 2021 - 70th Annual Illinois ASBO conference Schaumburg, IL
- November 19 - 21, 2021 - IASB-IASA-IASBO Joint Annual Conference Chicago, IL