

SDS Touch Base Tuesday Agenda

June 9, 2020

Presenter: Kim

1. Trending Topics:

- ✓ Security – Request & Approval: How to Setup Requesters & Approvers?
- ✓ Purchase Order Setup:
 - i. Setting up Order for Master
 - ii. Settings for Next Year or Current Year
- ✓ Create New Entry View for Prior Invoices to be Labeled with COVID -19
 - i. Adding Activity Code to Journal entries
 - 1. Adjust Financial Reports to Include All accounts
- ✓ Setting up new Employee Contracts
- ✓ Fiscal Year End Procedures
 - i. Finance & Payroll Fiscal Year End Instructions

2. Enhancements and News:

- ✓ General Accounting Reports: New Payroll Ledger Card by Date Range and Account
- ✓ Check List: Activity Data Checklist
- ✓ Gemini TRS News – [Click Here to Access our News Page](#) (must enter in the password **gods** to access it)
 - i. **NEW!** Free Live TRS Gemini Webinars with SDS <https://schooloffice.com/sdsandtrs/>
 - ii. Free TRS Gemini Online Course <https://www.sdsuniversity.com/p/trs2021>
- ✓ **Personal Protective Equipment** – You can purchase (Masks for ADULTS OR STUDENTS, N95 Masks, KN95 Masks, Cotton Masks, FDA Masks, Hand Sanitizer, Antibacterial Wipes, Medical Gloves and Touchless Thermometer). Prepare for now and the new year by ordering today. [CLICK HERE TO ACCESS THE ONLY PDF and ORDER FORM](#)

3. Looking forward:

- ✓ **What's Coming – Stay Tuned to your Inbox:**
 - **Annual User Webinar Conferences Dates Booked** – Please save the dates. Registration coming soon, individually and packages!
 - 09/10/20 - Annual User Webinar Conference for Colorado School Districts
 - 09/11/20 - Annual User Webinar Conference for Illinois/Wisconsin (All States)
 - 09/17/20 - Annual User Webinar Conference for Colorado Charters
 - 09/18/20 - Annual User Webinar Conference for Michigan/Indiana
 - 11/19/20 - Master Class Webinar (This will become face to face + webinar if things lift this year)

- **Annual School Board Conferences**
 - * Many conferences have been canceled or rescheduled due to COVID-19. This is the schedule we have to date. Hope to see you face to face soon.
 - IASBO Conference – Rescheduled to 11/3 – 11/5 - Peoria Civic Center, Peoria, IL
 - Indiana ASBO - 11/8 – 11/10 - French Lick, Indiana
 - IASB Conference – 11/20 – 11/22 – Hyatt Chicago

- **Free Live Webinars – Register Today**
 - **NEW!** Free Live TRS Gemini Webinars with SDS
<https://schooloffice.com/sdsandtrs/>
 - **Today's Touch Base Tuesday**
 - Next TBT will be June 23th - [To register for future TBT click here](#)
 - **New User Boot Camp**
 - Next one will be June 18th - [To register for future LIVE sessions + recording - Please note, June sessions will return to live webinars with recordings, so that we can answer individual questions and connect with each of you.](#)