SDS Touch Base Tuesday Agenda

August 27, 2019

Presenter: Carla

1. **Trending Topics:**

   - ✓ Creating the 941 report with Schedule B.   Payroll Check Option
   - ✓ How to set up external website addresses
   - ✓ Adding an Outside URL when using Menu Folders

2. **Enhancements and News:**

   - ✓ SDS Update News   (Resources Online or https://schooloffice.com/sdsnews/)

        Password: **gosds**
   - ✓ General Ledger Transaction entry Sort option: Ability to sort by Fund
   - ✓ Purchase Order Authorization entry view: Ability to see the PO Attachment
   - ✓ Paid Accounts Payable by Fund & Check Number

3. **Looking forward**:

   - ✓ **What's Coming – Stay Tuned to your Inbox:**
     - ***Use Coupon Code TBT10 for attending today to receive 10% off.**
     - **FREE LIVE WEBINARS**
       - **New User Boot Camps –October 10, 2019 (Skipping September due to Annual Conferences)**
         https://schooloffice.com/newuserbootcamp/
       - o **Next Touch Base Tuesday** will be **September 10, 2019 (9-10AM CST)**
         - **Click here to register:** http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/
     - o **ANNUAL EVENTS + SERVICES - EVENT DETAILS ON NEXT PAGES**
       - **SDS Annual User Conference Registration & Event Bundles**
         https://www.sdsuniversity.com/courses/category/Events

       - **Master Class for Users that want the next level of training**
         https://www.sdsuniversity.com/p/masterclass

       - **New Online Courses & Course Bundles per Job Role**
         www.sdsuniversity.com

Copyright 2019 Specialized Data Systems

SDS ANNUAL USER CONFERENCE (LOCATION/WEBINAR)

- **LOCATIONS + DATES + TIMES (9:00 – 3:00) + DETAILS:**
  - <u>Webinar</u>
    - Online – September 27th – [Click here for event specific details](#)
  - <u>Illinois</u>
    - Oak Brook - September 5th – [Click here for event specific details](#)
    - Champaign - September 6th – [Click here for event specific details](#)
  - <u>Colorado</u>
    - North Conejos - September 5th – [Click here for event specific details](#)
    - Aurora - September 6th – [Click here for event specific details](#)

- **WHO:** Any SDS user that would like to learn and connect with the SDS community through webinar or **face-to-face**.
- **TRAINERS:** SDS Expert Trainers
- **GET:**
  - **Webinar =** Conference Manual, Live Q & A and Conference Recording (To watch at your own pace – Start, pause, replay at your own speed)
  - **Onsite Conference =** Continental Breakfast, Conference Manual, Goodies, Box Lunches and Connection Time (Get to know other users and the SDS team face to face)
- **AGENDA:**
  Below is a brief high level overview of what we will be covering.

  - Navigating the brand NEW SDS Website
  - Services
  - Menu Selections
  - Approval Process
  - GASB 84
  - Green Accounting
  - Accounts Payable
  - State Specific Reports
  - Customizable Reports
  - Financial Month and Auditor Control
  - Re-Classification
  - Teachers Retirement System (IL)
  - Control Center
  - Tips and Tricks
  - 2020 Enhancements
- **COST:**
  - Webinar Conference = $269/person – **(Full day webinar, manual, recording and SDS completion certificate) – No Travel Costs**
  - Location Conferences = $299/person – **(Continental Breakfast, Conference Manual, Goodies, Box Lunches and Connection Time (Get to know other users and the SDS team face to face)**

- *Event's bundles (Includes, Kick-Off Conference, Annual Conference and Masterclass) are 10% off
- **REGISTER:** Check out all our events and event bundles by visiting https://www.sdsuniversity.com/courses/category/Events

MASTERCLASS

- **DATE + TIME:** November 21st – 9:00 – 3:00 CT
- **LOCATION:** 200 E. Randolph Suite #5100 Chicago, IL 60601
- **WHO:**
  - Masterclass is for SDS users that have been using the system and would like to take their SDS knowledge to the next level. If you want to take your SDS knowledge beyond basic training and increase your job efficiency, then keep reading.
  - This class will be a small group of SDS power users. There are limited seats. This environment provides you with the opportunity to connect with other SDS users face-to-face.
  - Included in the day will be a continental breakfast to start our day, a group lunch to allow more time to connect, and an award ceremony to complete our Masterclass.
  - The date of this course is Thursday, November 21, which is the day before the Illinois School Board Officials Conference and the Chicago Magnificent Mile Light Festival. This is a perfect time to attend our Master Class and the School Board Conference and bring family and friends to enjoy the Light Festival. Join us for a fun weekend in the Windy City. https://www.themagnificentmile.com/lights-festival/
- **TRAINERS:** You will be trained by two expert SDS trainers and the **Founder & Head Programmer of SDS Terry Litz!** He will be making a guest appearance to show you amazing features in the system and to come by to say hello!
- **GET:** Masterclass Manual, Continental Breakfast, Goodies, Sit Down Group Lunch (Time to really get to know each other) and Completion Award. Trained by two expert trainers and founder of SDS.
- **AGENDA:**
  Below is a brief overview of what we will be covering in Masterclass.

  Financial Report Design
  - Storing Reports with Changes
  - Using Report Examples
  - Designing Special Columns
  - Charting Values
  - Creating Report Groups
  - How to Control Report Totals

  Payroll
  - Mass Change
  - Fringe Benefit Distribution

- Insurance Benefit Distribution Without a Payroll
- Expense Reimbursements

Emailing Features
- Purchasing
- Direct deposit
- Using message center

Purchase Orders
- Approval Process – Special Features
- Purchasing Catalog Option

Green Accounting
- Ways to Upload Documents
- What and How Can Documents be Loaded

- **COST:**
    - $599 – Masterclass Manual, Continental Breakfast, Goodies, Sit Down Group Lunch (Time to really get to know each other) and Completion Award. Trained by two expert trainers and **founder of SDS**.
    - *Event's bundles (Includes, Kick-Off Conference, Annual Conference and Masterclass) You receive 10% purchasing events together.

- **REGISTER:** Check out all our events and event bundles by visiting https://www.sdsuniversity.com/courses/category/Events