SPECIALIZED DATA SYSTEMS

SDS Touch Base Tuesday Agenda

September 24, 2019

Presenter: Kim

1. **Trending Topics:**
   - ✓ When setting up a new Budget Master account, how to create the new State Code if not listed?
   - ✓ How to change an Invoice Date or Invoice Number on a permanent check?
   - ✓ Financial Reports: How to add a Default Report if it was deleted?
   - ✓ How to set up employees to use the Employee Portal?

2. **Enhancements and News:**
   - ✓ Employee Contract Report with Distribution: Payment Reason code added to report
   - ✓ GASB 84 Video and documentation
   - ✓ EIS Salary Report: Update Email & Award Attendance selections

3. **Looking forward**:

   - ✓ **What's Coming – Stay Tuned to your Inbox:**
     - o ***Use Coupon Code FRIENDS10 for attending today to receive 10% off.**
     - o **Annual User Conference Webinar – This FRIDAY – Don't miss out, Register Today by clicking below to view the syllabus and register.**
       - o https://www.sdsuniversity.com/p/annualconfwebinar
     - o **FREE LIVE WEBINARS**
     - o **New User Boot Camps** – Starting October 10, 2019 (Skipping September due to Annual Conferences)
       https://schooloffice.com/newuserbootcamp/

     - o **Next Touch Base Tuesday** will be **October 8, 2019**
       - o **Click here to register:** http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/

     - o **ANNUAL EVENTS + SERVICES - EVENT DETAILS ON NEXT PAGES**
       - o **SDS Annual User Conference Registration & Event Bundles**
         https://www.sdsuniversity.com/courses/category/Events
       - o **Master Class for Users that want the next level of training**
         https://www.sdsuniversity.com/p/masterclass
       - o **New Online Courses & Course Bundles per Job Role**
         www.sdsuniversity.com

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