

## **SDS Touch Base Tuesday Agenda**

**September 28, 2021**

Presenter: Kim w/Guest Leslie

### **1. Looking Forward:**

- ✓ **Annual Conferences (REGISTER TODAY, EVENT PACKAGE SAVE 20%)**
  - [Click Here to Register Today](#)
  - October 7<sup>th</sup> – SDS Reporting Conference
  - November 18<sup>th</sup> – Masterclass – WEBINAR only
  
- ✓ **Sales**
  - November 18, 2021 – 75<sup>th</sup> Annual Indiana ASBO Conference Ft. Wayne, IN – In Person
  - November 19-21, 2021 - IASB-IASA-IASBO Joint Annual Conference Chicago, IL

### **2. Enhancements and News:**

- ✓ Tell us Your Story Survey: [Tell us your SDS Story \(office.com\)](#)
- ✓ SDS Web Office Settings: PO Authorize email notification
- ✓ Accounts Receivable: Date selector added upon re-printing AR Invoices
- ✓ Colorado: CDE Staff Profile new column added for 2021-2022 FY
- ✓ Update from 9/14 TBT: Use Text when adding the Cell Phone field

### **3. Trending Topics:**

- ✓ Check Reconciliation: How to move items made permanent in one check group to another?
- ✓ Payroll Tip: Are you utilizing the Payroll Checklist's?
- ✓ Financial Reports: How to create a Financial Report using specific Subtotal Definitions?
- ✓ X – Connect – Utilize X- Connect to reference prior cases, [click here to access](#).

### **4. State of Illinois Gemini TBT Tip:**

- ✓ When do I need to perform the Gemini TRS Payroll Reset?
- ✓ For additional TRS support please visit our free materials by [clicking here and registering for free](#).