

## SDS Touch Base Tuesday Agenda

October 8, 2019

Presenter: Kim

### 1. Trending Topics:

- ✓ How to set up the start and end dates for a deduction or benefit?
- ✓ How to combine/merge accounts, vendors, customers and employees?
- ✓ How to re-issue a voided check?

### 2. Enhancements and News:

- ✓ Customizable Payroll Report: Advanced Employee Search Option

### 3. Looking forward:

#### ✓ What's Coming – Stay Tuned to your Inbox:

- FREE LIVE WEBINARS
  - **New User Boot Camps** – will be **October 10 (This Thursday)** – We will be covering **Check Reconciliation and End of Month**.  
Click here to register: <https://schooloffice.com/newuserbootcamp/>
  - **Next Touch Base Tuesday** will be **October 22, 2019**  
Click here to register: <http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/>
- **ANNUAL EVENTS + SERVICES - EVENT DETAILS ON NEXT PAGES**
  - **Master Class for Users that want the Next Level of Training and**  
<https://www.sdsuniversity.com/p/masterclass>
  - **New Online Courses & Course Bundles per Job Role**  
[www.sdsuniversity.com](http://www.sdsuniversity.com)
  - Save 10% off events, bundles and courses today by using **TBT10** for attending today!

## MASTERCLASS

- **DATE + TIME:** November 21<sup>st</sup> – 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.
  - This class 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 Masterclass, 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.

### Hot Topics

- ACA, W2, 1099
- TRS

### 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**.
  - **REGISTER:** Click on the following link to register <https://www.sdsuniversity.com/p/masterclass>