

SDS Touch Base Tuesday Agenda

November 13, 2018

Presenter: Kim

1. Trending Topics:

- i. How to use the menu tree drop down selection?
- ii. Is the SDS Staff Support login, security settings correct?
- iii. How to create reports to verify totals on the 941 report?

Note: To receive information about 941 reporting requirements, contact your auditor or IRS at 1-800-829-4933

iv. How to initially install Green Accounting on your computer?

1. How to attach AP invoices using Green Accounting, after they have been posted?

v. How to set up Vendor Direct Deposit?

NOTE: *Specialized Data Systems is now accepting A/P Direct Deposit. If you wish to set up this option with SDS, send your information to Sherrie Hendrickson at sherrie@schooloffice.com*

2. Looking forward:

- Next Touch Base Tuesday will be **November 27, 2018**
 - **Click here to register:** <http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/>
- **Upcoming Courses:**
 - ✓ ACA Reporting (12/3/18 - VIDEO RELEASE + 12/10/18 - 1 hr 9:00 - 10:00 CT Live Q & A + RECORDING Call Included)
 - ✓ W-2 Reporting (12/10/18 - VIDEO RELEASE + 12/14/18 - 1 hr 9:00 - 10:00 CT Live Q & A + RECORDING Call Included)
 - ✓ 1099 Reporting (12/10/18 - VIDEO RELEASE + 12/14/18 - 1 hr 11:00 - 12:00 CT Live Q & A Call + RECORDING Included)
- **Online Courses – W2, 1099 and ACA Courses REGISTRATION COMING THIS WEEK!**
 - These self paced courses are great to learn or refresh yourself before the year begins on an area of the SDS system. Also, if you are new to the system these courses are perfect for you. If you register for five or more, you will receive a 10% discount. You can get with other users at your school to register for a group of courses today.
 - **Course offerings:**
 - Payroll Timeclock and E-Timesheets
 - Deduction / Benefit Setup

- Employee Portal
- Human Resource Center
- Security
- Financial Reporting
- General Accounting Reports
- Check Reconciliation
- Accounts Receivable
- Tips and Tricks (How to help with processing in the Finance area)
- How to Optimize Payroll and How to Use Custom Payroll Reports
- ACA Reporting *New one coming soon
- W-2 Reporting *New one coming soon
- 1099 Reporting *New one coming soon
- Purchase Order Security Setup and Processing
- Employee Portal Processing (From the Employees View)
- Green Accounting
- Look & Browse
- Salary Schedule
- Budget Planning Assistant
- Using the Question and Answer Report Option
- Using "Budget Master" - 5 Areas
- Reoccurring Entry for A/P, Cash Receipts, Transactions + Associated Reports
- Administrative Utilities (Security excluded)
- Fixed Assets
- Accounts Payable
- Awarding of Days

Click here to register: <http://schooloffice.com/sdsservices/sds-online-continuing-ed-courses-registration/>