SPECIALIZED DATA SYSTEMS

Finance Newsletter
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Inside This Issue

Did You Know? SDS Offers a Web Hosting Service
Let US do your updates, backups, and more

More and more schools are taking advantage of our hosting service. When we host your site, you can have peace of mind that all of the updates and backups are taken care of, leaving you more time to do other things. If you would like more information on this service, contact Sherrie Hendrickson at 800-323-1605

Budget Planning Assistant – Makes Budgeting Easy as 1-2-3

The Budget Planning Assistant provides a way to comprehensively work on your budgeting needs. It allows you to pick what data you want to see on the grid on the left and you can even have a notes column to make notes in as you work on the budget. On the right side your budget can be sequenced down for you to focus on a certain group of accounts at one time which makes it easier to focus on one group of numbers at a time. It allows copying from one column to another. Did you know you can not only plan your budget for the upcoming fiscal year, but also forecast budgeting trends into future years? Budget Planning Assistant can also facilitate the following activities to ease the budgeting process:

- Utilize multiple budget columns to provide varying versions of a working budget.
- Optimize planning by implementing search options to pull specific budget account groups.
- Monitor Values for each budget column to target key budgeting thresholds.
- Incorporate Salary and Benefit Expenses left to pay in the fiscal year to show accurate YTD balances for budgeting.
- Use "Copy To", "Add to", or "Percent Change" options to make global changes to groups of accounts or to an entire budget.

This is a great tool that you need to check out and utilize. Use the link below for location of the Budget Planning Assistant, for use of this financial tool, and for a walk-through on budgeting scenarios:
http://help.schooloffice.com/financehelp/#!Documents/budgetplanningassistant.htm

Importing a Budget

Did you know you can import your Next Years Budget into the Next Year Budget column? If you have your budget in an xlsx or csv format, you can easily import this file in a few simple steps.

Follow the below link for more information on this process:
http://help.schooloffice.com/FinanceHelp/#!Documents/importdatafromcsvorexcelfiles.htm

Generating Purchase Order Number by Fiscal Year

You can assign a different set of Purchase Order numbers for Current and Next Year utilizing the Fiscal Year as part of your Purchase Order number. The purchase order process will assign the next available number with the appropriate Fiscal Year included for each Current or Next Year Purchase Order.

To activate the Purchase Order Number Format:

1. Open Administrative Utilities, SDS Web Office Setting
2. Select Purchasing
3. Navigate to Purchase Order Number Format
4. Select the Dropdown arrow to view and select your option for Fiscal Year Purchase Order Number Format
   F = Current/Next Fiscal Year
   L = Order For Location
   # = Sequential Number Starting with 1
   Example;
   0000FF#### (0000160001 Current Fiscal Year 0000170001 Next Fiscal Year)
   0000 Leading Zeros
   FF Two Digit Fiscal Year indicating Current or Next Fiscal Year
   #### PO number starting with 1
5. Select the Save Changes button located at the top of the display

Purchase Order Number Format	########## 0000FF#### 00FFFF#### 00FFLL#### FF######## FFFF###### FFFFLL#### FFFFFLLL### FFLL###### FFLLLLL###	F=Current/Next Fiscal Year, L=Order For Location, #=Sequential Number Starting with 1
Purchase Order Production By Admin Group		N = Default value. Y = Purchase Order printing and Make Permanent options are restricted to the admin groups for which a user has access.
Purchase Request Entry Percentage Distribution		Activate PO Percentage Distribution on the purchase request entry screen

Note: Some setting options include the Location number (L = Order for Location). To incorporate the Location, each entry in Order For Location (Master File and Code Entry | Master File Vertical Data Entry and Changes |Order For Master) would need a numeric Location number.
http://help.schooloffice.com/financehelp/#!Documents/generatingpurchaseordernumberbyfiscalyear.htm

Upcoming Conferences: Stop By and See Us!
Colorado and Illinois

Colorado Association of School Business Officials Conference
Date: April 19–21
Where: Westin Hotel in Westminster Colorado.

Illinois School Business Officials: IASBO Conference
Date: April 26–28
Where: Peoria Civic Center in Peoria Illinois.

Smothered Green Beans
Bacon, Onion, Garlic, Easy

Ingredients:
- 6 slices thick bacon
- ½ cup minced onion
- 1 tsp minced garlic
- 1 lb trimmed green beans
- 1 cup water
- 1/8 tsp salt
- Pinch of black pepper

Directions:
1. Place bacon in large skillet and cook with medium heat until fat becomes tender.
2. Stir in onions and garlic. Cook 1 min.
3. Stir in beans and water. Let cook until the water evaporates, and beans are tender. If the beans are not tender by the time the water evaporates, add a bit more water until they are tender.
4. Season with salt and pepper to taste. Enjoy!