QSS Customer Education

Welcome to the QSSUG-sponsored
Purchasing Fiscal Year Transition Webinar

The **Purchasing Fiscal Year Transition** webinar, sponsored by the QSSUG Purchasing, Stores and Fixed Assets (PSFA) Committee, will demonstrate the processes involved in closing out one fiscal year and starting another from a Purchasing perspective.

When is it?

Tuesday, **May 23, 2017** from **10:00 am** to **12 noon** (Pacific).

Who might be interested?

Purchasing Administrators and staff; Business and Accounts Payable Administrators and staff; Technical Support staff; other staff interested in learning more about Purchasing end-of-year processes.

Why attend?

The **Purchasing Fiscal Year Transition** webinar covers:

- Year-End Requisition Cancellation (POX086)
- Setting up and using control dates for routing/non-routing users, including how to handle emergency requisitions/PO's
- Purchase Order/Requisitions Fiscal Year Control (POX000)
- Identifying and analyzing open purchase orders (POR110)
- Assigning payment action codes (POPYMT)
- Rolling Y1 PO's to Y2 PO's (POR510) or Y2 payables (POR520)
- Closing out and liquidating open PO's (PCLXFR/PCL920)
- Starting Fiscal Year 2 – odometers for requisitions, PO's, estimated payables for Y2 (GOUPDT)
- Copying PO requisitions from Y1 to Y2 (POCOPY)
- How routing users can copy requisitions they did not create
- Cancelling Y2 PO requisitions if incorrect information was entered into POCOPY
- Managing Queues for simultaneous Y1/Y2 activity
- Miscellaneous topics: Sales tax rate change (GOUPDT); tax rate differentials (VEUPDT)
- Reviewing how to use multiple account lines using percent or dollar splits

What does it cost to attend this webinar?

- **Members** of the QSSUG PSFA Committee: no charge; **compliments** of the Committee.

- **Non-members** of the PSFA Committee: **$250** per registration must be **pre-paid**. Mail a check payable to:

Quintessential School Systems
867 American Street, 2nd Floor
San Carlos, CA 94070

If you don't know if your organization is a member of the **PSFA Committee**, please contact your technology support staff, or contact a **PSFA Committee co-chair** (Linda Crawford, LCrawford@stancoe.org or Keri Pintches, KPintches@orangeusd.org).

Will this webinar be recorded?

This webinar is scheduled to be recorded for later viewing. It takes a few days to process the recording and make it available in QCC. Within approximately one (1) week of the live broadcast, you'll be able to view it by clicking the link on the QCC "Help+Video" menu.

How to register?

Participants must <u>self-register</u>. To self-register:

- Please use the link on this page to register. You can also find this flyer posted on the QSSUG listserv and at www.qss.com.

- **After registering**, you'll automatically be approved and you'll receive a confirmation email from the registration site once you complete the registration.

   - Please carefully check that you've provided your correct email address
   - If this is your first time registering for a *QSS* webinar, please verify with your email administrator that you're allowed to receive emails from these registration sites -- CitrixOnline.com and GoToMeeting.com

- *QSS* will give the PSFA Committee co-chairs a list of all webinar registrants to verify membership status. Co-chairs will contact any registrant who may have checked the wrong membership status.

   - **<u>Non-members</u> of the PSFA Committee**: Mail a **$250** check per registration, payable to:

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     Please reference the name and date of the webinar on your check.

- The **deadline for registrations** is **<u>9:00 am</u>** (Pacific), **Tuesday, May 23, 2017**. Registrations won't be accepted after this time.

You can use **one registration** for a group of people who will view the webinar together on a single computer (either a stand-alone computer or one connected to projection equipment).

How to attend online?

Once you've registered, you'll receive a confirmation email with all the information you need. Leading up to the webinar, you'll also get reminder emails.

Webinar materials are available on the QSS/OASIS Webinars page of the Secure Support Area (SSA) around 24-48 hours prior. If you don't know how to access the *QSS* SSA, please check with your organization's technology support staff.

If you have additional questions about which equipment you need, or how to attend, please email Mike Smith at mike@qss.com.

Register now by clicking the link below:

https://attendee.gotowebinar.com/register/5486825088285542658

Please be sure to check your email for your registration confirmation.