PRELIMINARY AGENDA

SCHOOL ERP PRO USER GROUP MEETING
FINANCE AND PURCHASING & PAYABLES

WELCOME & INTRODUCTIONS

- Discuss next meeting date and hosting site
- Connecting, Collaborating, & Learning – Ongoing Education Offerings

GENERAL SESSION

- Tyler Connect 2023
- User Group Meetings and Importance of registering for tylertech.com
- Employee Access *(subject to change)*

FINANCE AND PURCHASING & PAYABLES SESSION

- What's New & Updated: v2022.3 – Desktop Version:
  - P/P - Vendors > Vendor Direct Deposit Setup - You can add a direct deposit vendor with the Deduction dropdown.
- What's New & Updated: v2022.3 – Cloud version: Review Release Notes
  - Q & A's

LUNCH BREAK

FINANCE AND PURCHASING & PAYABLES SESSION

- Overview:
  - Fiscal Year Rollover Preliminary Setups
  - Tip on disabling Prior Year Email Alerts
  - Why can't you delete old account codes overview
  - Finding inactive account codes linked with detail – Run the Query overview
  - Copy Req/PO vs Exporting PO's
  - Managing year end encumbrances in P&P
  - Q & A's

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