

9:30	Registration	14:00	<u>Session Five – Diary</u>
9:45	<u>Session One – SQL Basics</u>		<ul style="list-style-type: none"> • Updating diary • Linking to documents/reports • Adding subsequent diaries • Diary Reporting
	<ul style="list-style-type: none"> • Logging In • User/Practice/Office Dashboards • Menu system <ul style="list-style-type: none"> - Creating personal shortcuts 	14:45	<u>Session Six – Reporting</u>
10:00	<u>Session Two - Setting Up Cases</u>		<ul style="list-style-type: none"> • Saving reports to Word/Excel • Emailing Reports • Cash book reporting
	<ul style="list-style-type: none"> • Basic Case Details • Case Staff/Bordereau • Case Notes <ul style="list-style-type: none"> - Linking to diary tasks • Diary Setup • Entering Names and Addresses • Use of Master contacts/Excel • Statement of Affairs 	15:00	<u>Session Seven – Advanced Administration</u>
11:30	Coffee	15:30	Coffee
11:45	<u>Session Three – Creditor/Debtor/Employee Data</u>	15:45	<u>Session Eight – Centralised Reporting</u>
	<ul style="list-style-type: none"> • Creditor Claims <ul style="list-style-type: none"> - Notes - Proxies • Creditor list screen attributes • Employee claims • Paying distributions <ul style="list-style-type: none"> - History 		<ul style="list-style-type: none"> • Master Contacts • Practice • Global
	<u>Session Four – Trading & Book Debt Adjustments</u>	16:10	<u>Session Nine – Letter and Form Production</u>
	<ul style="list-style-type: none"> • Trading – Invoices, Payments & Allocations • Debtor adjustments / write offs 		<ul style="list-style-type: none"> • Printing forms <ul style="list-style-type: none"> - Multiple cases • Printing letters • Printing labels • Report Sets example
13:00	Lunch	16:35	<u>Session Ten – Contributions</u>
			<ul style="list-style-type: none"> • Contribution schedule basics • Calculating schedule • Adjusting schedule • Links to receipts • Reports • Report sets to produce letters
		17:00	Finish

