



AGENDA FOR DREAM WORKSHOP

Monday 18 May 2020 as a Webinar

DreamView & Reporter, MTD & Custom Columns

PRESENTERS

LISA ARMITAGE, PRINCIPAL CONSULTANT

10.00 a.m. – 4:00 p.m.

10: 00 to 12:30

DreamView

- Retrieving Static Data
- Using Balance Functions
- Export to Dream

DreamReporter

- Creating – Max Date for Purchase Ledger
- Tables
- Criteria and Parameters
- Grouping
- Using via DreamView/Reporter

12:30 to 13:30 Lunch

Making Tax Digital

- Configuration
- Standard
 - Nominals
 - Ledgers
 - Accounts
- Alternatives
- Reporting
- Processing

Custom Columns

- Lookups
- Formulae
- Scripting
- Using Entities (Avg. Days to Pay, Last Account Comment)

16:00 Finish