

# Upcoming training with SDM at NIFHA



*Scott Drever and Ian Nelson of SDM at the NIFHA Annual Conference 2017.*

**Following on from their recent well-received delivery of training on Universal Credit and Welfare Reform, SDM Housing software will be back in February to help NIFHA members hone their IT skills.**

SDM are offering training in how make the most of Word in your correspondence with residents, how to deal with rent changes, and how to manage your data.

## ***Effective use of Letters via Word and Imaging and Attachments***

**- Rents & Housing Management, Repairs & Maintenance, Applications & Waiting List. (1 day course)**

**Date: 8th February // Cost: £220 + VAT // Includes lunch.**

This course will take customers through the process of effectively using Letters via Word and using Imaging and attachments functionality. This includes setting up their document including mail merge settings and creating their customised Export File, as well as creating the letter in SDM and attaching it to the diary.

- Set up your Word Document
- Set up a Customised Export file in Rents and Housing Management - CSV file
- Run the Export to create a .csv file in Excel
- Link your Letter to the Data File (.CSV)
- Creating a Mail Merge Word document in SDM, printing it and attaching it to the diary
- Create Merge - Run, Edit and Print Letters
- Using the standard Word Letter and .csv file again and again
- Set up a Customised Export file in Repairs and Maintenance
- Set up a customised Export in Applications and Waiting List
- Scan documents and attach them to diary entries

### ***Rent Changes (1/2 Day Course)***

**Date: 9th February // Cost £120 + VAT // Refreshments provided.**

This course is designed to assist customers in implementing rent changes and advising tenants of their new rent charge. The course will cover the process for applying rent changes using both SDM standard routines and importing changes via Excel.

- Overview of the Rent Changes functionality
- Details of the Rent Change Criteria
- Calculating Rent Changes in Excel
- Importing Rent Changes Direct from an Excel Spreadsheet
- Processing the changes and updating the files
- Producing Rent Change Letters from within SDM

### ***Excel for SDM Users (1 Day Course)***

**Date: 15th February // Cost £220 + VAT // Lunch provided.**

This course is designed to help Excel users to manage their data using the data out of SDM. Its aim is to give SDM users skills that they can use any time they export data out of SDM or use a SQL report. This training course will not cover how to export from SDM or how to create a SQL report.

Part 1: Initial Tidying up of your Excel Spreadsheet

Part 2: Filtering

Part 3: Pivot Table 1

Part 4: Using Formulas to make sense of the data

Part 5: Pivot Table 2: tidying up Pivot Tables and Make them easier to read

Part 6: Starting Point

Part 7: Setting up Year and Month

Part 8: Setting up IF, IF AND and IF OR

Part 9: IFERROR with IF and VLOOKUP

Part 10: Using SUMIF and COUNTIF to create tables

Part 11: NETWORKDAYS

Part 12: extracting the Age of tenants/owners using DATEDIF

Part 13: Tidying up your tables page

Part 14: Creating Charts

***To book you place on any of the above courses please contact:***

***[ian@sdmhousing.co.uk](mailto:ian@sdmhousing.co.uk)***