

K2's Excel Magic Part X

Using Excel's SUM function to simplify the sum through formula building process

Adding or removing worksheets from a sum through total

Working with Excel's Data Consolidate function to consolidate data by position or category

Learning Objectives

Upon completing this course, you should be able to:

- Differentiate the advantages and disadvantages of using the SUM function to produce sum-through formulas as compared to simple arithmetic formulas
- Implement dummy end-point worksheets or columns to simplify the data consolidation process and reduce errors
- Differentiate between using Data Consolidation by position and by category

VohCom and Workflow

With Tax Season fresh on our minds, it's a great time to consider how to make next tax season better with workflow software that was designed with that specific need in mind. Our presentation will provide you with a demonstration of how to streamline your T1 season processes while increasing staff efficiency and improving customer service.

Heather Morrison and Ray Francis of VohCom Software will provide a demonstration of how to:

- efficiently prioritize, schedule and monitor work
- enhance internal communication, information sharing and sending and or receiving work
- maintain and organize an engagement-based paperless filing system
- accelerate and enhance security in communicating with clients
- save time with automated time tracking and real-time WIP for generating and sending invoices
- get ready for next year, this year with just a few clicks



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