

Welcome!

The webinar will begin shortly.

Copilot & ASU Updates

Partner Information Webinar

Quick notes

- A recorded copy of the webcast will be provided along with a PDF version of the slide deck.
 - Today's session is in *listen only* mode—please click the "?" symbol to ask questions.
- At the end we will open it up for a Q&A. Please ask your questions throughout the presentation and we will do our best to answer them all.

Welcome

Meet the Team

- Tim Dobson
- John Benza
- Halsey Sawyer
- Ylani Rabedeau
 - Curriculum Development

What We're Covering

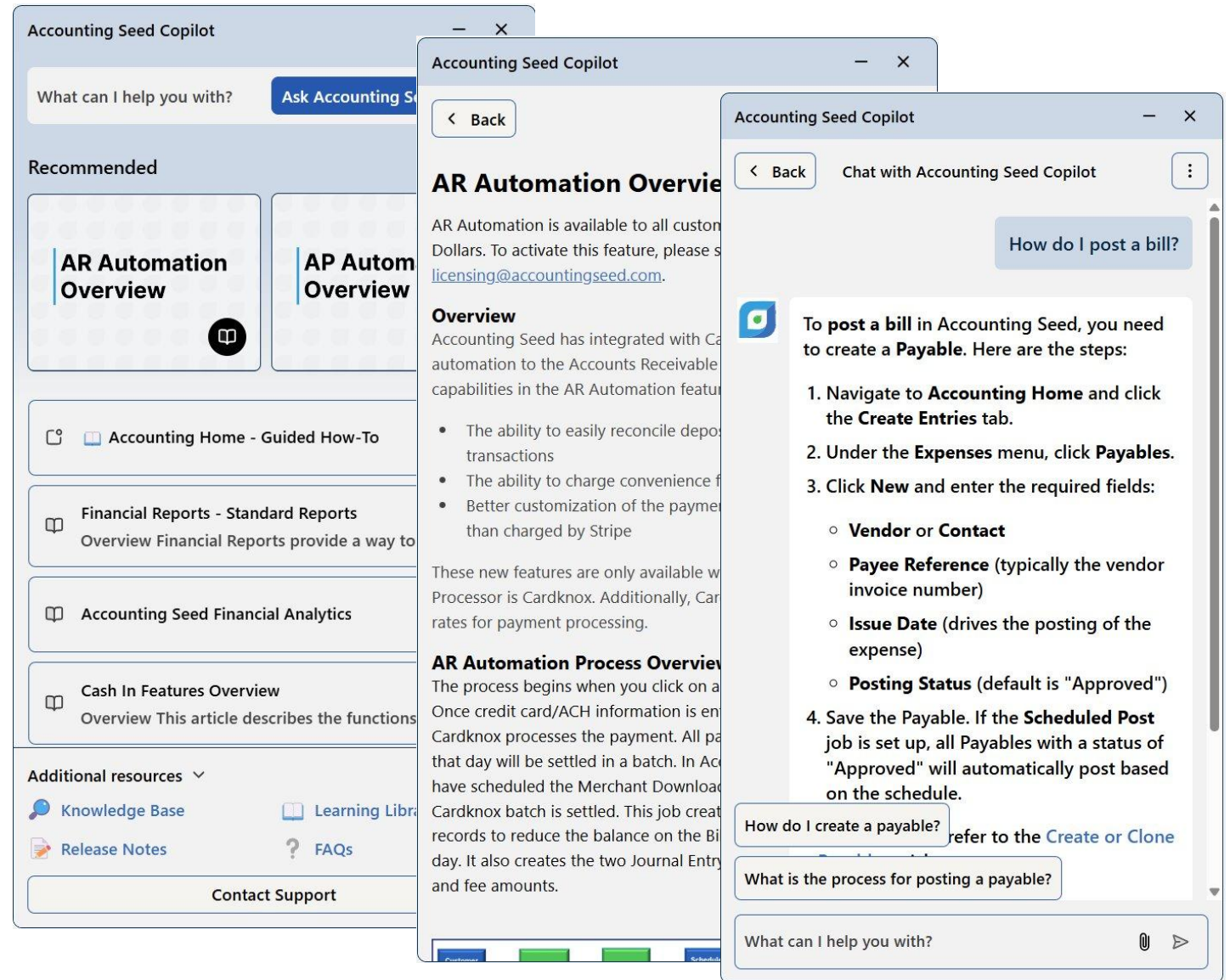
- Brief introduction to Copilot
- Setting up and configuring Copilot for customers
- ASU changes
- Revamped Certification
 - New courses and content
 - Maintenance requirements

Accounting Seed Copilot

What is Copilot

Accounting Seed Copilot—your in-app AI assistant!

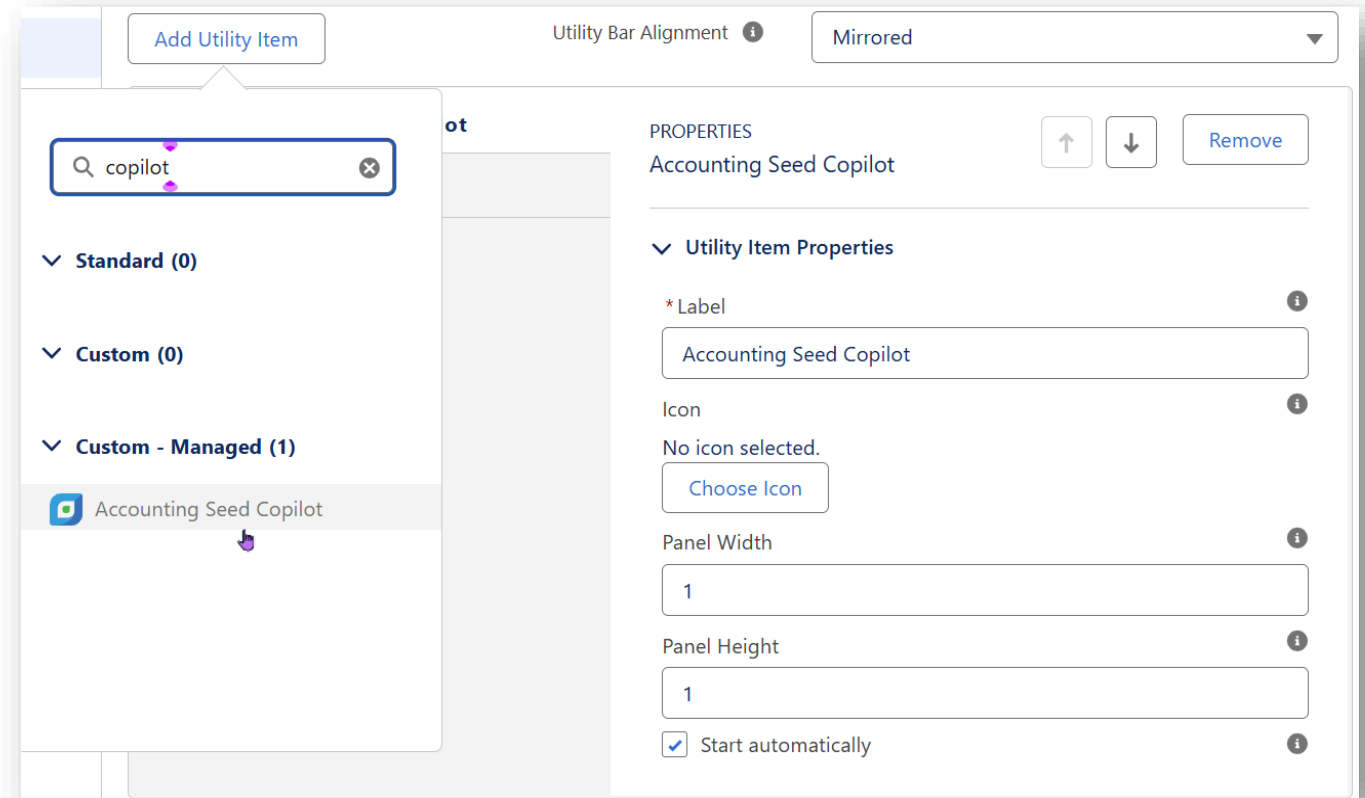
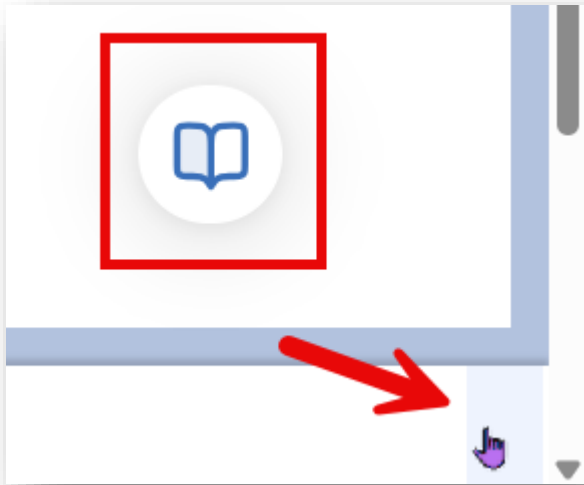
When you need to know how to do something in Accounting Seed, just ask Copilot. The AI capabilities in Copilot, not only streamline your everyday activities by offering answers to questions, task lists, and even walk-throughs, it surfaces the information you need. Helping you move from novice to expert without ever leaving the Accounting Seed platform!



How to Add Copilot to App

Considerations

- Managed Package vs Custom App
- Accounting Seed release version
- New install vs auto-update
 - [Configuration changes](#)



Accounting Seed University Updates

Accounting Seed Certification Program

Accounting Seed Certification

- Launch April 3, after Partner webinar
- Content focused on Financial Suite implementation
- Target audiences are Partners & PCs
- Certified status dependent on tri-annual maintenance courses

Next Steps

- Orders & Inventory Certification
- Customer/End User specific content

Search my courses

Info

Name

9

courses in progress

0

completed courses

7m

training time

3

badges

20

points

Accounting Seed Implementation Certification

Financial Suite

0 Welcome and Introduction

Accounting Seed Financial Suite Impletement Certification

0%

1 Kickoff and Setup

Kickoff & Setup

0%

RESTRICTED

2 Master Data

Master Data

0%

RESTRICTED

3 Configuration

Configuration

0%

RESTRICTED

4 Go Live

Go Live

0%

RESTRICTED

5 Financial Suite Exam

Certification Exam

0%

Recertifications

2025

Spring 2025

Summer 2025

Winter 2025

ACCOUNTING

Financial Implemen

CERTIFIED



Accounting Seed Certification Program

Accounting Seed Certification Content

- Kickoff and Setup
 - Installing Packages
 - Default Settings
- Master Data
 - Chart of Accounts
 - Accounts, Products, Opportunities, Contacts
- Configuration
 - Taxes
 - PDF Formats
 - Automatic Jobs
- Go Live Preparation
 - BDC
 - Billing lifecycle
 - Payables lifecycle
 - Reporting

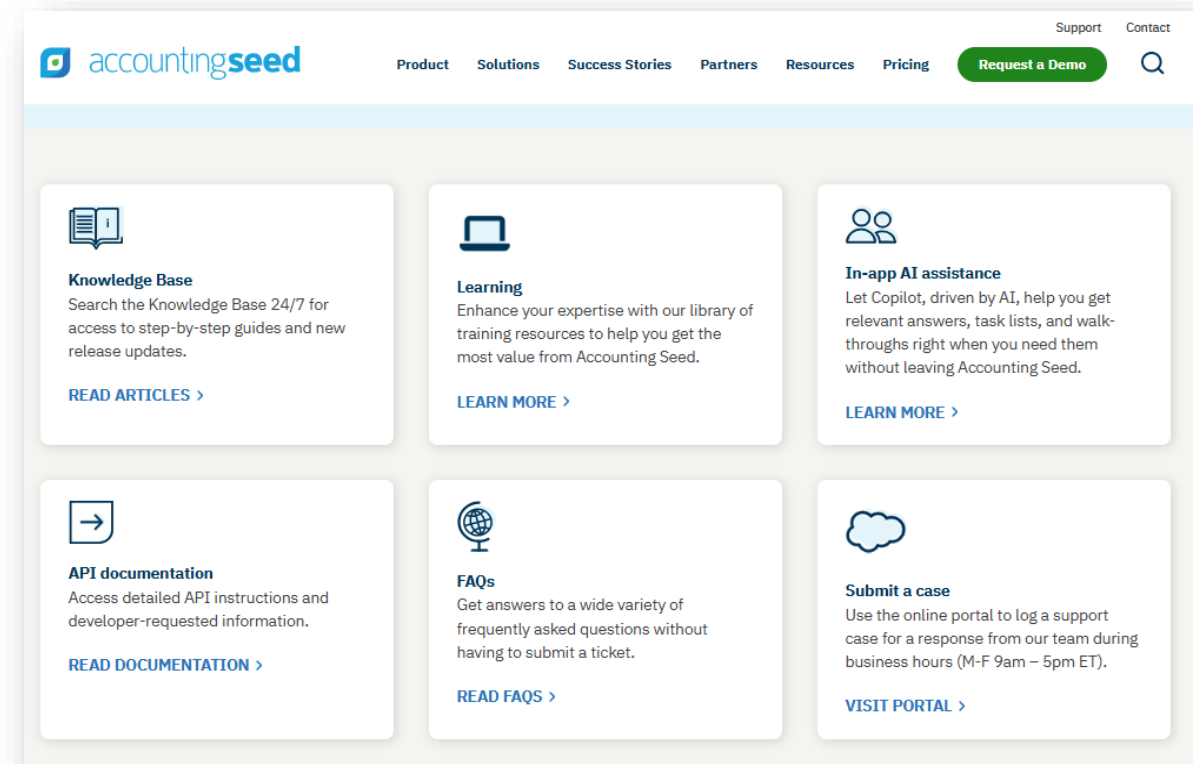
The screenshot displays the Accounting Seed University dashboard. At the top, the header includes the Accounting Seed University logo, a green badge indicating '30 points', the user's name 'Ylani Roth' with a 'Learner' role, and navigation links for 'Messages' and a search bar. Below the header, a 'Home' section features a search bar and a summary of course progress: 8 courses in progress, 1 completed course, 4h 22m training time, 3 badges, and 30 points. The main content area lists the 'Accounting Seed Implementation Certification' with a dropdown menu. Under 'Financial Suite', the '0 Welcome and Introduction' section is marked 'COMPLETED'. The '1 Kickoff and Setup' section is currently selected, showing 'Kickoff & Setup' at 0% completion. Below it, '2 Master Data' is at 0% and '3 Configuration' is at 0% with a 'RESTRICTED' label. The '4 Go Live' section is also visible. A right-hand sidebar contains links for 'Progress', 'Discussions', and 'Calendar'.

Resources

Take advantage of all the resources available to help you get the most value from Accounting Seed!

Bookmark

accountingseed.com/support



For additional questions and resources,
email us at partners@accountingseed.com or visit
accountingseed.com/support/partner-center/

Thank you for joining us!

Accountingseed.com