Product Release Notes & Overview

SchoolLeader Version 10.1

October 2016

The following document details the features and technology that are new -- or have been enhanced – since the last release of SchoolLeader – Version 10.0. If you have any further questions, contact Kressa Software at 800 858-8570

The theme of Version 10.1 is **connectivity**! In this ever expanding online world, connectivity with your customers is critical. To meet that need, we are introducing more connectors for two great products that also support your Childcare industry. We also further enhanced existing interactive features to make staying in touch easier.   And lastly, we are introducing a new SchoolLeader Web Portal to better serve your customers in a real-time.

We have also invested a considerable amount of time and effort to further improve the stability and performance of our cloud based processes.   We believe this is a great release and hope you find the time to install it soon. If you are already running Version 9.2 or greater, there are no additional hardware or software requirements for you to consider. It should run on all the same computers you now use.

New – *InfoView.net* Web Portal now available for Cloud customers!

We are excited to announce the first release of our SchoolLeader Online Web Portal – *InfoView.net*.   This is just the beginning, but it already offers great features to help you, your customers, and your staff, stay better connected.

Connect with everyone! InfoView.net is a browser based product that works with any brand computer or screen size.   If someone is using a Desktop PC, a laptop, a tablet, or even a smartphone, *InfoView.net* will work great. It will sense the device and provide a user experience that works best with that environment. *InfoView.net* is smart!

Connect instantly! Infoview.net connects directly with your cloud based SchoolLeader database.   No separate database or services to cause potential synchronization problems, no separate connectors to create a delay in updates between the portal and your FrontDesk Manager tools.   When data changes anywhere, it is recognized and available everywhere - instantly. *InfoView.net* is fast!

Connect flexibly! With *InfoView.Net* you can start slow and grow the customer interaction at your pace.   From directly within FrontDesk Manager, you have an InfoView Configuration tool to set available features and permissions for them.   You decide what customers can see and do. You even control the sites colors with one of many themes to help make it blend with your own school's website. *InfoView.net* is configurable!

Connect with information!   Using *InfoView.net*, you will never again spend time several hours a week servicing requests from your customers for basic information. Statements, year-end payment history, attendance details, can all now be viewed, saved, and printed directly by the customer. Also, do you want to let parents/employees view contact info you have on file? You can do that too. Want them to have the ability to even change that information? It's an option and totally your choice. Give your

customers access to their information, and start freeing up your staff to focus on the things that really matter. *InfoView.net* is empowering!

Fig 1. - Payment Account page where Primary/Legal Guardians can view their families current Account activity. They can also view/email statements, and even pay directly online! It is just one of many features available with InfoView.net.

This is just a quick overview of the power of InfoView.net, and we are excited to show you more. Once you see it in action, we are confident you will agree InfoView.net will complement the other SchoolLeader tools (FrontDesk Manager, CheckPoint, etc.) to provide greater convenience for you, your staff, and most importantly, your customers.

To prove it, we are offering InfoView.net absolutely *FREE* from now until February 1, 2017. No additional monthly fees if you are already using our SchoolLeader Cloud Services! Also, no startup fees! We will setup your personal InfoView.net website and train you on its use at no charge if you sign up during that period. Give us a call to learn more and get started!

New – CardConnect™ Electronic Banking partner adds more choices

We are excited to now offer a third payment processor which is fully integrated within SchoolLeader! **CardConnect** (www.CardConnect.com) joins with **IStream**® and **FirstData**® as another fast and seamless way to handle your electronic banking needs directly from within SchoolLeader.   However, this time we have created a connection with this processor to offer **even more!**
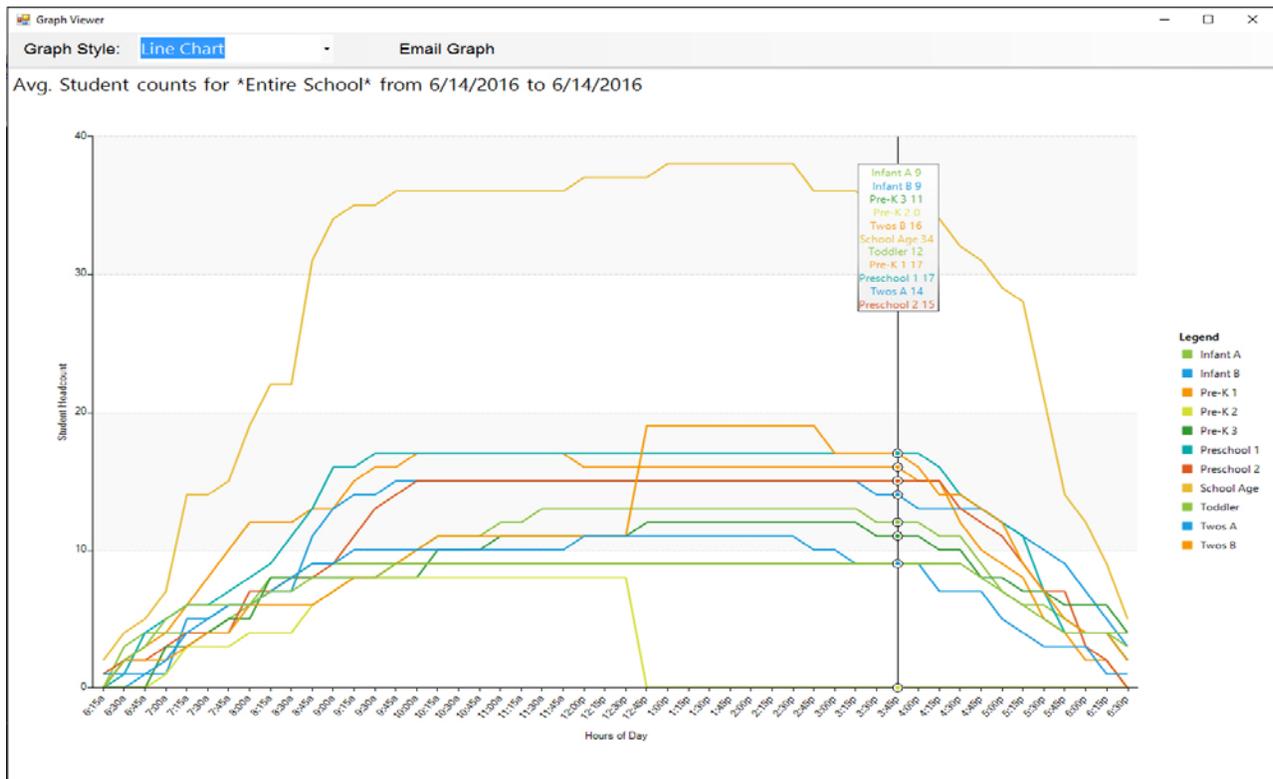
Often times, customers have existing relationships with other merchant banks or companies. For various reasons customers often want to maintain that relationship, but use SchoolLeader to handle the processing.   Until now that has not been possible. But with CardConnect, we have created a new "Gateway Only" service. For a flat monthly fee of $85, CardConnect will use your preferred bank's merchant account to process payments with MasterCard, Visa, etc., but do so on behalf of YOUR bank. This means your existing relationship with this merchant bank remains the same. Management web portals, monthly statements, fees, merchant transfers, etc., all remain unchanged. You don't have to do anything different.   CardConnect only processes the payments for you behind the scenes for that flat fee, regardless of how much you process.

Call us to learn more. We will be happy to tell you about this new Gateway Only processing, as well as their traditional Merchant Banking Services, similar to what is offered with our IStream and FirstData connectors.

Updated – Graph Manager and viewer

All graphs which measure attendance have been updated to report totals every 15 minutes rather than the previous 60 minutes. This will help you manage your student/teacher ratios more closely. To easily browse classroom counts, you can hover over the graph to view exact attendance at each 15-minute increment

In addition to the new 15 minute increments, the "Email Graph" feature has now been enabled. The option was visible at the top of the toolbar in v10.0 but wasn't enabled. In v10.1 SL will now send a snapshot of the graph you are viewing and email it to the address of your choice.

As always, you can access this Graphing Manager window from the REPORTING option on the main menu in FrontDesk Manager.

New – Preschool2Me.com™ Connector

A Preschool2Me.com Connector has been added in V10.1 to support transmission of informaton about Students and classrooms to their service. This will help reduce duplication of effort for you, and share realtime activity to keep both services in-sync. This new connector wil allow for an initial synchronization of all relevant data with Preschool2Me for quick startup, as well as realtime synhcronization of any ongoing changes with this shared information. For example, if you change a parents telephone number, address, or relation with a student, that change will be sent Preschool2Me database almost instantly.

New – Promio ™ Connector

A Promio Connector has been added in V10.1 to support transmission of information about Students and classrooms to their service. Promio is a marketing tool and service to help you optimize search and social advertising, manage marketing campaigns, and drive more leads and enrollments. This connector, like most, will help reduce duplication of effort for you, and share realtime activity to keep both services in-sync. This new connector wil allow for an initial synchronization of all relevant data with Promio for quick startup, as well as realtime synchronization of any ongoing changes with this shared information.

New – Prepopulating of address fields can now be enabled/disabled

Up until this version, SchoolLeader has always prepopulated the City, State, and Zip Code when you were adding anything new that required an address (Guardians, Employees, etc.). SchoolLeader used the Schools physical address to prefill those fields.

Often this is a good option and saves you time. However, it can slow you down if your customers draw from a larger area where addresses can vary significantly (Schools based in a corporate park, or that draws from several small towns, are good examples).

Starting with 10.1, this feature is now optional and can be disabled from the School Identity window. Please note; with this new option, the feature itself will be disabled by default. If you want to continue using this prefill feature, simply go to Definitions on the main menu and select Edit School Identity. Check the box circled in red and you will be back to the way you were before!

Updated – SchoolLeader Cloud Services faster and better with CPU pooling!

In Version 10.1 we continue to enhance our "backend" processes to work better with our cloud hosted database, while still providing the same solid performance for our customers wishing to host their own local databases. Connection issues during peak workload hours? Virtually all eliminated! Speed and reliability? Depending on your equipment, you should experience further improvements of around **20% on average**! You may not notice fast running tasks that go from 2 seconds to 1.5 seconds. But a long running Bookclose process that may have taken 20 minutes will be noticeably faster at around 15!

And in this release we now fully support CPU Pooling. What is CPU Pooling? For those customers who have multiple locations and databases, we can now "tie together" your database servers so they can share CPUs to help with those big long running processes such as "posting recurring fees, or, closing the Accounting Period. With CPU Pooling we can take advantage of another schools sever power when they aren't using it, to help another school when they do.

Updated – Local Databases now run SQL Server 2014 SP2

We just talked above about a great change for our Cloud customers. Well, we also have improvements for our customers hosting their own databases. SchoolLeader V10.1 has been modified to work with Microsoft's latest iteration of their database product - _SQL Server 2014 SP2_ which was released just this July.

For new installs, you will receive this update at setup time. For existing customers, you can simply wait for the SP2 update to arrive with your normal overnight Windows Updates. The results will be the latest and most stable database engine that is ready to go for SchoolLeader and the next version of Windows which was released this August - Windows 10 AE (Anniversary Edition).

Ready for Microsoft Windows 10-Anniversary Update releasing August 2016

SchoolLeader has been tested and certified for Windows 10AU. Windows 10AU is another major update for Windows, and brings many new features for the User Interface, as well as a new .Net Framework engine under the hood (.Net 4.6.2). SchoolLeader has been tested on this new OS and is ready to go. It's a free upgrade if you are already on Windows 10, so feel free to move to it without concern of issues with SchoolLeader.

Updated – QuickBooks Connector now compatible with QB2016

The current SchoolLeader QuickBooks Connector has been updated and is now fully tested and compatible with QuickBooks 2016. It also remains compatible with all desktop versions of QB starting with QB2010

The QB-Connector is installed and run on the same computer with your QuickBooks software and acts as a "bridge" to allow SchoolLeader to automatically forward journal entries to your QuickBooks database when certain key A/R events occur, thus keeping your ledger in sync with your SchoolLeader Receivables sub-ledger without the need for manual intervention.

Updated – Email support is further extended throughout SchoolLeader

As electronic communication increases, so does SchoolLeader's support for it. Aside from the new online Info portal and all the great real-time communication it provides, we have tried to make some existing features more email capable.

- ➢ **Guardian Balance Viewer –** allows you to email statements to all parents who meet certain criteria. It's a great feature, but a small flaw existed in v10.0 which caused you to be prompted to confirm each email before it was sent to an individual. Version 10.1 corrects that, as well as improve on a few other user-interface problems. These changes make sending mass emails from the Guardian Balance viewer a better overall experience.

- ➢ **One-Time Group Payment Processor –** will now ask you if you'd immediately like to email a statement to one, some, or all the accounts when electronic payments are posted.

- ➢ **Email Address fields -** have ALL been increased from 50 characters to 150 characters. This will allow you to store more emails for a single person. In this ever increasing connected world, people often give you more than one email for reaching them. As always, you can still string multiple emails them together by separating them with a semi-colon (e.g. me@work.com ; me@home.com).

Updated – Message Alerts for employee sign-in includes new trigger event

Employee schedule messaging has been enhanced to also include alerts for employees that sign-in on a day they are not scheduled. You must be using the SchoolLeader Scheduler, and the Employee must be scheduled for at least one day in the current week. If true, when an employee signs in on a day they are not scheduled, they are allowed to proceed, but you receive an email alert. You can optionally also have an alert email sent to that employee.

The existing scheduling alert for late sign outs still works the same as before when this option is checked on the Message Alert Manager window. You specify the number of minutes late for a sign-out before triggering an alert.

Updated – Existing data purge feature now available for cloud databases

DBSupport has always allowed purging old data using a convenient menu based tool.   It's a great way to keep your database size from growing with unneeded data and slowing down your processes. Due to technical obstacles, this feature was not initially made available for customers using our Cloud based servers.   With 10.1 that has finally changed.   If you have your SchoolLeader database hosted on our SchoolLeader Cloud Servers, you can now use DBSupport to purge old data.

Other Enhancements, fixes, and Improvements

➢ **BackOffice Manager –** had a problem that prevented report logos to sometimes be updated.   This has been corrected in this new version.

➢ **Performance improvements** - for "flickering" issue when loading Folders. This only occurs for some Windows 10 users

➢ **Crystal Reports has been upgraded -** to the latest version for faster and more reliable performance.   The turnkey installer will automatically install the new engine and convert all reports for you automatically

➢ **Account Statement –** data entry box has been modified to make entry easier when creating the global message for the "Messages and Comments" box on the statement. This tool is found under Accounting > AR Rules > Edit Account Statement Message.

➢ **CheckPoint Station –** handles messages better when you have multiple children and more than one has a message for you to see.   Sometimes the messages were not displayed if you did a "Select All" to sign in/out all at once.

➢ **Social Security Numbers –** are stored for Students, Guardians, and Employees. These values are then used in some reports used for payroll reporting, etc.   Given the sensitivity of these numbers, SchoolLeader now masks their values on the related data entry windows after the information is entered.

➢ **Database backups –** are created easily from the main "File" menu. As an improvement to the process, SchoolLeader will now first scan your database for corruption or errors. If found, it will repair them before creating your backup copy.