

Product Release Notes & Overview

SchoolLeader Version 9.2

January 2014

The following document details the features and technology that are new -- or have been enhanced -- since the last release of SchoolLeader -- Version 9.1. If you have any further questions, contact Kressa Software at 800 858-8570

This all new Version 9.2 builds off Version 9.1 introduced just this past summer. In that summer release we began offering our new Cloud Services. Now we offer performance improvements for those services, several new features, and also several enhancements that make SchoolLeader fully compatible with Microsoft's newest Windows 8.1 that was released just before the New Year. There are also several new connectors to third party providers that will help improve productivity even further for your fast paced business!

New - Listen360™ Connector

SchoolLeader now offers an integrated connector for Listen360 which automates the transmission of your student enrollments, disenrollments, suspensions, etc. This allows L360 to quickly send timely correspondence and surveys to your customers for feedback.



Listen360 provides an efficient way to manage feedback and use your customers' direct and honest comments to improve business operations, correct shortcomings, and deliver outstanding customer service. You benefit from retained business and a steady stream of recommendations that lead to sustained growth and profitability. Learn more by visiting their website at www.Listen360.com.

New - ProspectLink™ Connector (KRK schools only)

SchoolLeader now offers an integrated connector for ProspectLink which automates the transmission of your customer contacts and enrollment data inside SchoolLeader directly to them. This allows ProspectLink to quickly send timely correspondence to help convert those prospects into customers as well as retain the ones you have.



ProspectLink is a fully automated, cloud-based service that lets you market to a specific prospect using a variety of multi-media channels. Research shows that a highly personalized combination of mail, email and phone calls is the best way to follow-up with a potential customer. Learn more by visiting their website at www.ProspectLink.net.

Updated – SafePASS Door controller supports 1-1 matching now

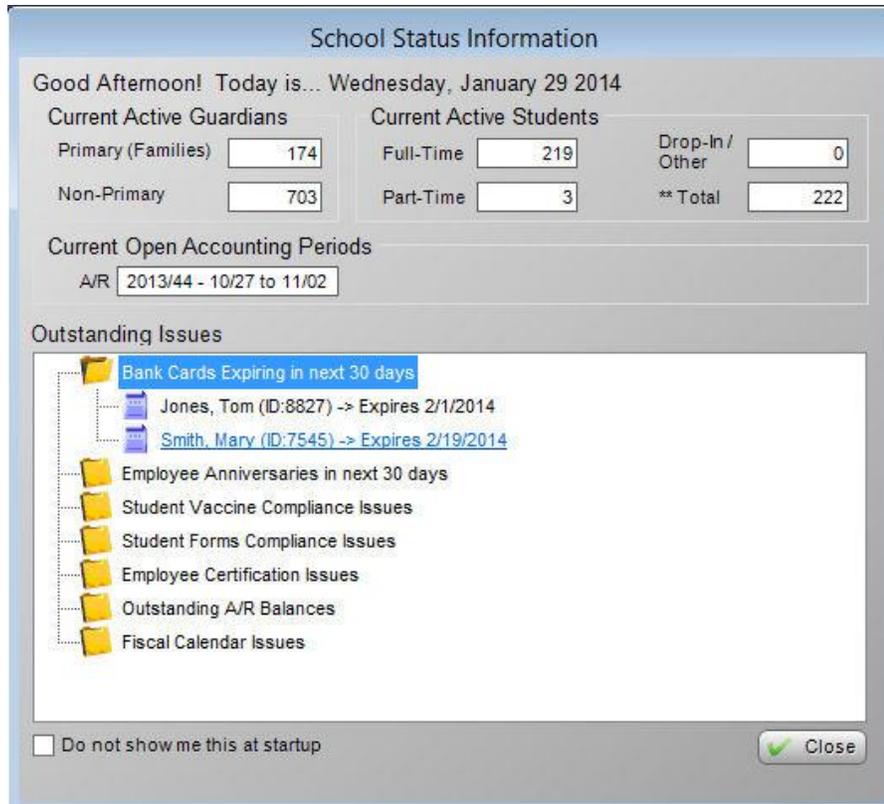
Those using SafePASS for door access with a ZK Technology TF1700, now have the option of doing 1 to 1 matching if the user first enters their ID#. This is in addition to the normal method where you simply place your finger on the scanner for identification and authentication..

How does 1-to-1 matching work? For those parents or employees who have difficult fingerprints, they can FIRST type their unique ID# at the keypad, press OK, and THEN place their finger. This helps by limiting the images that must be scanned for authentication, thus increasing the chance of success.



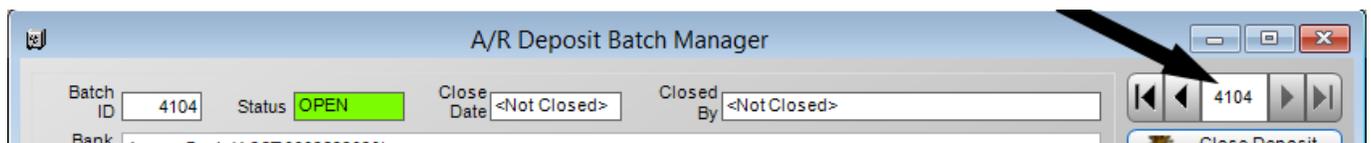
New – School Status Window now shows expiring bank cards

For those storing bank cards for recurring billing, etc., you can now view a list of cards that will be expiring in the next 30 days so you can be proactive and obtain a new one from your customers. Doing that is as easy as running the School Status window. There is a new category listed that is labeled “Bank Cards expiring in next 30 days”. It will be shown as the first item if there are any cards expiring



New – Deposit Manager adds new “jump” feature

To move quickly back or forward to a particular Deposit Batch, you can now simply type in the Batch Number you want to view and press the Enter key. Of course the scroll buttons still work as before to give you two options for navigating the Deposit Manager.



Updated – QuickBooks Connector now compatible with QB2014

The current SchoolLeader QuickBooks Connector is now fully tested and compatible with QuickBooks 2014. 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 - Database Engine running on SQL Server 2012 SP1

SchoolLeader's primary database engine has been upgraded to support *Microsoft SQL Server 2012* SP1. If you are running an older version of SchoolLeader, the v9.2 installer and built-in Windows updates will automatically upgrade the software for you.



Important Note: Windows XP is no longer supported for development by Microsoft and will end all support on April 4, 2014. The latest products from Microsoft such as SQL Server 2012, Office 2013, etc., will not install on XP. As a result, SchoolLeader 9.2 will not run on this Operating System. Windows Vista, 7, 8, or 8.1 is required to upgrade

Updated – Real-time account reconciliation enhanced

SchoolLeader has always been able to maintain the balance of your sub-accounts in real-time. It does this by constantly analyzing your debits, credits, and payments posted for a Primary Guardian's payment account and booking payments to those affected sub-accounts based on priorities you set in the A/R configuration tables as well as a first-booked-first-covered rule. However, there were limitations and sometimes SchoolLeader would block you from making changes until after the period was closed. This was especially true if you were moving money into and out of escrow accounts. Now Escrow management is faster and smarter. You will not be blocked when trying to move money around after payment funds have been reserved in escrow. SchoolLeader will now make the necessary accounting adjustments. It will also prevent YOU from making some common accounting errors related to escrow.

Other Enhancements and Improvements

- **Third Part Account Statements** can now be produced for specific and individual subsidized families. Producing full statements for all activity generated by the Third Party still remains an option.
- **Full support for Windows 8.1** which was released in November 2013 and uses the newest Windows .NET Framework 4.5.1. If you are using Windows 7 or 8 and experiencing any unexpected shutdowns of SchoolLeader, try upgrading to 9.2.
- **New and faster data indexing** for certain larger data tables such as Accounting, Student Attendance, Employee attendance, and Employee Scheduling. This will help improve performance for functions dependent on these tables as well as help eliminate "deadlock" errors.
- **CheckPoint Express will now indicate** the employee signing a person in AS WELL AS the parent who was authorizing the action.
- **Reconciliation step has been added to the bookclose process** which runs before the balance transfers are created. This will help reduce the number of balance transfers moving to the next period for those accounts that were never modified during the period.
- **Credit Card "automatic service fee" feature has been extended** to the One-Time Group Payment process.
- **Performance improvements** to better support the low power Intel Atom processors typically used in newer tablets
- **NSF options for payments** was only available for Checks, EChecks, and ACH. Now you can also perform NSF functions on payments designated as "Other"
- **A/R Period Closing process**, and Fee Schedule process, have been improved for faster performance.
- **Performance improvements** for "flickering" issue when loading Folders. This only occurs for some Windows 8 users

