

# KinderSoft Version 2009.2.0 update notes

Released December 2009

## New Features:

- Account Summary view/report now includes age debtor's values for 1-30, 31-60, 61-90 and > 90 days.
- Account No. Column added to invoice (batch) list.
- Account summary filtering now allows 1) All transactions 2) Hide zero balance 3) Hide zero and negative transactions
- New field account (Guardian) status. User defined status values allow filtering of account summary and statement view by status.
- Guardian occupation and nationality fields

## Bug Fixes:

- Added 'All transactions' checkbox to account statements page. (Functionality missed during change from dialog window to full page).
- Account summary hide zero balances no longer hides negative balances.
- Account summary export now correctly exports numerical data.
- Fix invoice summary batch focus issue when deleting invoices.

## Miscellaneous:

- Removed customer information page from installer.

## Notes:

None

Regards,

The KinderSoft Team.

# KinderSoft Version 2009.1.0 update notes

Released November 2009

## New Features:

- New weekly (multiple day) time line view. View has three display modes hourly, half hourly and sessions and can be grouped by age band or room. Supports print and export functionality.
- Booking change wizard. New wizard to step through the process of changing a booking that is currently active. The wizard will close the existing booking on the day prior to the new booking pattern start date.
- Ability to hide (Filter) zero value invoices from the invoice batch and monthly summary views.
- Invoice Tagging: When changing an existing booking either through the new booking change wizard or directly, if the booking changes may affect an existing invoice you will be given option to tag the invoice(s). Tagged invoices are grouped together under a new tab in the invoice viewer.
- Invoice Re-generation: Selecting Regenerate Invoice from the invoice popup menu (right click) will display a side by side view of the current invoice and the invoice if it were to be generated for the same period again.
- Account summary report and account statement account selection functionality moved from popup dialog to main window.
- New payment summary view displays summary information regarding payments including last payment date and amount, payment method and a new setting usual payment frequency.
- Restore dialog changed, instead of separate file name and location fields these have been replaced with the full path to the restore file which can now be populated from the open file dialog.
- Ability to mark a booking not to be included on future invoice runs.
- Ability to individually archive (and un-archive) children.
- Option to load child and related data at program start. This results in a slower initial start-up time but means fewer delays during initial program usage.
- New child column 'pricing method'
- Ability to filter the register by AM or PM sessions
- Check availability and full check functionality is now configurable between room capacities and age band (OFSTED) capacities
- Start date column added to waiting list
- Time span discounts: Child discounts can now be configured to only apply during a specified time span, outside of these periods the standard child discount will be applied.
- Fee estimator allows for a quick calculation of fees based upon the child's age and session requirements.
- Invoice Templates: An invoice template can be stored against individual children, during invoice generation the contents of the invoice template will be inserted into the invoice instead of the results of the normal invoice generation process. The following invoice items can optionally also get added to the invoice template;
  - invoice period description line
  - adhoc bookings
  - additional items
- Annual invoice period option added, the annual invoice period will generate an invoice for a complete year with the invoice period start date defaulting to the 1 Jan. This option also adds the option of inserting a weekly or monthly payment line.

- Find Invoices tab added to invoice module.
- Credit amount column added to invoice views. The credit amount is the total of credit items on an invoice.
- Availability indicator when creating/changing bookings is now displays OK for available places not just FULL.
- Date of birth column added to waiting list

## **Bug Fixes:**

- Fix gender summary page display issue, previously always showed 'Female'
- A bug has been found in the remittance (payments) load process that was causing significant impact of overall application performance during loading the payments module.
- Fix occasional access violation when viewing monthly invoice summary.
- Stop KinderSoft issuing a not open warning message when trying to book an ad-hoc session on a weekend through the new booking wizard.
- Fix date display issue on booking manager bookings list.
- Do not show children on active child list if child is only on the waiting list.
- Do not enter diary entries for staff that have left the nursery.
- Possible access violation during printing of all invoices and batch lists resolved. NB: Invoices will now always be printed in invoice number order.
- Support for > 64 sessions. Multiple session picker was limited to 64 items.
- Population level days to check limit was being applied when creating/changing bookings even if the option was switched off on the options form.

## **Miscellaneous:**

- Progress dialog displayed during Invoice batch print routine.
- Improved performance when deleting invoices (especially soon after starting KinderSoft).
- Smart invoicing option has been relabelled now reads 'Include un-invoiced sessions prior to the invoice period start date' This option is also duplicated on the invoice generation wizard.
- KinderSoft now runs just fine under a limited account on XP, Vista and Windows 7

## **Notes:**

None

Regards,

The KinderSoft Team.

# KinderSoft Version 2009.0.0 update notes

Released April 2009

## New Features:

- Diary integration options. Allow configuration of automatically generated diary events.
- New check box added to set leave date form. Caption: This child will not be returning to the nursery. If this check box is not checked then the child's leave date property will not be set. Previously the set leave date function always set the child's leave date as well as closing any open bookings
- If a child's booking pattern is changed for a child with a leave date in the past then the leave date is cleared.
- New column 'Next Room Movement Date' added to child list views.
- Option to use the annualized calculation on partial months and months where the invoice period is split into two or more invoicing periods. New calculation adds a weighting algorithm.
- Option to show the annualized calculation on the invoice.
- New nursery performance snapshot module, providing management reporting for:-
  - Occupancy history chart
  - Breakdown of children by age chart
  - New registrations report
  - Place cancellations report
  - Enquiries summary report
  - Ability to email (PDF) summary report to head office
- Preferences option to hide the Child properties Guardian #2 tab
- New starter wizard, clicking on the new child link on the home page now invokes a new starter wizard designed to step you through the process of entering basic child details, optional parental and session information. The wizard also includes a new simple session picker screen that offers an alternative method of selecting sessions.
- Set leave date dialog has been expanded to record the date that notice was given and the leave reason.
- Current session prices (Age or Room) columns added to session manager view
- Account balance and last payment date columns added to invoices view
- New birthday column displays the DOB without the year. (Allows sort order by day of the month)
- Ability to mark a credit as inactive, such credits will not be included on future invoices.
- Significant improvements to the enquiry tracking module, including a cleaner user interface, improved data collection and colour coded views.
- Added free text comments to bookings (and waiting list items)
- Added Dietary, Allergies, medical, immunisations and special needs columns to health list view
- Payment memo text added to payment detail report
- Deposit report module with two modes, current child deposit position (balance) and deposit increase/decrease during period.
- Staff Criminal Records Bureau check date, with expiry options and diary reminder integration.
- Ability to filter the staff sign-in sheet by room
- Staff qualifications columns added to staff list view. This is populated with the most recent qualification date.
- Staff bank details
- Qualifications added to staff details report
- Ability to find payment details by payment ID
- Option to include special days (bank holidays and other nursery closed days) discount in annualised calculation.

- The setup wizard has a new page for configuring annualised invoicing options.

## **Bug Fixes:**

- Fix sort order on staff holidays and qualifications views
- Fix display corruption when adding a new room in the setup wizard
- Child deposits were being applied to both primary and secondary parent/guardians.
- Adjustments label was not being inserted into invoices for second and subsequent siblings
- Session availability checker now working again
- Account summary report as of date may not be updated correctly if the date was manually input as opposed to being picked from the calendar
- Include children with a stipulated room on invoice run even if the child is outside all available room boundaries
- Clear child leave date value if a booking is made which includes dates after the child leave date
- Void invoices are now not included in batch totals.
- The room name is now appended to the session description if the child is set to booking level room allocation. Previously this was only performed if the child had more than 1 booking.
- Fix issue when re-opening database after performing a backup. On some PC's this would cause an exception from the database layer.

## **Miscellaneous:**

- Link to KinderSoft updates web page added to help menu
- File menu item to open an explorer window to the database folder. NB: this option is only displayed if the CTRL key is held down when opening the File menu
- Preferences option to force use of OFSTED staff ratios when calculating staffing levels. Switching this off will use calculate staffing levels using the configurable staff/child points system.
- Added contact mobile (if present) to contacts column
- Account summary report as of date added to report title
- Option to backup only the core database file, resulting in smaller backup files
- Add item button added to child properties medical page to allow new lookup items to be added without having to go to the lookup items manager
- Preferences option to save column customisation settings, if this is not set KinderSoft will revert to the default column configuration. KinderSoft will also delete the user column settings files.
- Secondary guardian telephone and mobile columns added to child column list
- Display message if an invalid registration code is entered into the product registration dialog.
- Tariff added to child column list
- Child date input and registration date columns added to waiting list
- The invoice property form will now list all children in the child combo box if the selected account does not have any associated children.

## **Notes:**

None

Regards,

The KinderSoft Team.