



Surfside Software

Part of the Surfside Lighthouse Group, Inc.

Proudly Serving America's Schools

Newsletter - Summer 2009

Version 7 of Surfside Lighthouse

We are proud to say that the rollout of *Surfside Lighthouse* Version 7 was one of our smoothest deployments ever!

Version 7 offers many new features that are described in detail both in previous mailings and at www.surfsidesoftware.com. Some of the highlights of V7 include:

- **Student data sheet report** - a consolidated, customizable report that shows logical groupings of a student's demographic data
- **Attendance calendar report** - a student-by-student report that prints up to a full year of pupil's daily attendance in a graphical, calendar-based view
- **Attendance grid report** - a compact, easy-to-read presentation of up to four months of attendance data for a student reported on a single line
- **Queries can be "pinned" to the reports menu** so that end users can run a complex query report that you designed for their use
- **Dozens of new fields were added** to better track student and parent contact information
- **Field manager was upgraded**
- **Capture data item** allows you to copy certain student data elements (i.e. schedule data, GPA, attendance totals) into a field on the student's General tab to support easy searching/sorting on that data

This is just a scratch on the surface of what was added to *Lighthouse* in Version 7. For complete information on Version 7 please visit our web site www.surfsidesoftware.com or contact our sales team today at 800-942-9008, ext. 110 sales@surfsidesoftware.com.



**Special
Promotions
Now
through
August 31,
2009**

From now through August 31, 2009 Surfside is offering the following special promotions on upgrades and adoptions of additional products:

Refer-A-Friend Promotion

If you refer another school to us which then purchases *Surfside Lighthouse* between now and August 31, 2009 **your school will receive a complimentary 60 day extension to its tech support plan.** The purchase *must* be completed by August 31, 2009 for you to qualify for the support extension. The referral must be stated at the time the new school contacts us.

Surfside Lighthouse Version 7

We are currently in Phase 3 pricing for the V7 upgrade. **If you upgrade between now and August 31, 2009, we will roll you back to Phase 2 pricing.** Please call our sales team to determine your savings during this special offer.

Surfside Lighthouse Gradebook Version 2

From now through August 31, 2009 **save 10% on an upgrade from Version 1 to Version 2 and get one year free support.** If you do not still have your Version 2 price quote letter please email sales@surfsidesoftware.com and we will retrieve it for you.

MyStudentData.com Internet student data access system

Start a new subscription to MyStudentData.com between now and August 31, 2009 and **receive an extra ninety days free.**

“Intensive Care Gold” Support Plan

Subscribers to the “IC Gold” service program *receive all product version upgrades* as they become available. Intensive Care Gold includes the same telephone and email technical support services as are provided with the basic Intensive Care support plan.

What You Get - Each time Surfside releases a version upgrade to your product (i.e. *Lighthouse* Version 6 to Version 7), you will receive that upgrade and necessary documentation absolutely free. We will also offer upgrades to “successor” products (like when we moved from *Surfside Solution* to *Surfside Lighthouse*) at a significantly discounted price - even lower than the preferred-customer pricing we offer to all holders of standard Intensive Care plans.

The IC Gold program offers your school a one price solution to keep your Surfside products up-to-date all the time with a single annual budget item. The cost for an Intensive Care Gold support and upgrade plan is computed on a school-by-school basis. **Please contact our sales staff for information about IC Gold.**

It’s the End of the School Year

While the kids are chanting, “No more teachers, no more books...etc.” the administrators are no doubt taking a welcome respite from the chaos of the typical school day.

We all know that administrators hardly spend their summer resting and recreating! However during this brief respite before you dive head-lone into preparing for next year, we suggest you pause to think about **safeguarding your vital student data.**

Surfside Lighthouse archives your student data when you run the end of the year processes. This data is saved in a file designated with a file extension of **LHA**. The archive file is usually saved in the same folder as your main student data file (LHD extension).

At some time soon after you archive your data, we suggest that you copy the LHA file to a couple of CD/R’s or flash drives. Leave one copy in your school’s vault and place the other copy either at the district office or take it home with you. This should afford you some additional protection in case of a fire, theft or natural disaster.

“Helpful Hint” – Schedule Parameters and the School Calendar

Most *Surfside Lighthouse* users know all about managing the attendance calendar – but did you remember there is a second “calendar” in *Lighthouse* – the one that was defined when you established your schedule parameters during last year’s master scheduling.

To see your current schedule parameters, open up Schedule→ Schedule Parameters. Note the beginning/ending dates of each block.

As school draws to a close we often get frantic calls or emails to the effect, “My teachers can’t find their rosters!” Most often the teachers cannot access their rosters because you have “overshot” the school year as defined in schedule parameters. A quick change to the schedule parameters fixes this in a jiffy!

Surfside Academy Summer Sessions

Our popular “Surfside Academy” training program is now booking for summer 2009.

Option 1 – Training on Cape Cod - You are cordially invited to join us here on beautiful Cape Cod for individualized training.

These sessions are enjoyable and informative both for the visiting school personnel and our own staff. “*Surfside Academy*” sessions are conducted at a conference center here on scenic Cape Cod. **Half-day programs may be arranged to permit you to enjoy summer on Cape Cod.**

Option 2 – Web-Based Sessions – This year we are pleased to offer web-based training sessions for up to five participants. Using a combination of an on-line meeting and teleconference, we can provide such training much as we do in our more intensive “face to face” seminars – all without leaving your school.

This program is not for first-time users. It is for experienced users of the software who wish to sharpen their skills and for those who are being tasked with training other staff in the use of *Surfside Lighthouse*. All training is school-specific so you get to help set the agenda for your session.

Call **800-942-9008, ext. 240** today for information and pricing for “*Surfside Academy*.”

Charity Ledger-Report System with Donor Tracking

Helping Schools Meet Today's Financial Challenges

Fundraising in a Recession

Everyone realizes the challenges in front of America's schools caused by the so-called "Great Recession" of 2009. Most of us know that public sector funds have never been more threatened than they are right now.

How do we meet this challenge? One way to survive an economic downturn is to tap new sources of revenue. Many schools already do this with parent-operated "booster" associations or alumni scholarship associations.

Large private schools and colleges have turned this kind of data-based fund raising into an art form. Sadly, not every public or small private school has yet learned to exploit the wonderful resource hiding in its student database.

Each year you archive your *Lighthouse* database and your seniors head off into **digital oblivion**.

What if you could pick up those new alumni in another database and even add alumni data from prior years' archives? Add to that other alumni data from any other sources around town and **you have the beginnings of a fledgling "development program" for your school.**

Institutions that know how to work their alumni database **send out at least one mailing a year**. This "exercises" the mailing list and gets you back the address corrections so that your list remains current and deliverable.

Surfside Can Help!

Our Heritage Administrative Systems division has published school accounting software for over a decade. Last year, Heritage released *Charity Ledger-Report System* which was adapted specifically for non-profit accounting needs.

The spring Version 2 of *Charity Ledger* received an all-important **donor tracking system**. The donor database in *Charity Ledger* can become the base for your school's fundraising program.

Ideal for "booster", "alumni" or "friends of" organizations, *Charity Ledger* can be set up to import data prepared by *Surfside Lighthouse* to help maximize your fundraising efforts.

Donor Tracking with Charity Ledger

Charity Ledger can function as both a fund raising package and an accounting system for your school's supporting group. With comprehensive, auditable checkbook and general ledger systems, *Charity Ledger* is part of a family of fund accounting software that set the standard for accountability in school and non-profit fund accounting.

Donor tracking with *Charity Ledger*:

- Maintains a virtually unlimited number of donor records
- Manages detailed demographic data for each donor
- Supports an unlimited number of tracking "campaigns"
- Allows the user to track donors by "donor groups"
- Supports both ongoing fund-raisers and special events
- Prints donor letters or individual donation letters
- Records all letters sent to a donor through *Charity Ledger*
- Builds reports by "campaign", donor group and donor
- Prints donor summary reports for individual donors
- Publishes mailing and shipping labels for your donors
- Allows a specific letter to be assigned to a campaign
- Prints acknowledgment letters on the fly or in batches
- Provides a comprehensive, on-screen donor history
- Offers a fully interactive donor record screen
- Permits donation to be allocated over several accounts
- Holds donations in un-deposited funds if user wishes
- Maintains audit trail on edits to individual donations

Charity Ledger offers a centralized donor management screen that contains a record of virtually all contributions and correspondence your organization has had with the donor, as well as a free-form "notes" field where your staff can leave remarks and personal notes.

Charity Ledger is priced on a sliding scale from \$295 to \$995, based upon factors such as organization size, revenue and group affiliation.

One of our executives here has over 25 years of experience in non-profit fund raising and accounting. **We will be happy to share our expertise to help you establish and deploy your donor database.**

For more information on *Charity Ledger* visit www.charityledger.com, call 800-942-9008, ext. 130 or email sales@charityledger.com

Core Features of Charity Ledger

Highlights

- Single-entry bookkeeping
- Intuitive and *very* easy to use
- Fully interactive transaction register
- Fully interactive chart of accounts
- Excellent audit trail
- Saves time at data entry and audit
- Instant transfers of funds between accounts
- Improves organization of your finances
- Excellent technical support
- Very affordable price

Capacity

- Virtually unlimited number of accounts, sub-accounts, sub-sub-accounts...etc.
- Virtually unlimited number of transactions per month
- Maximum fund balance \$999,999.99

Transaction Data

The following is stored for each transaction:

- Date of transaction
- Transaction, check or receipt number
- Description (60 characters)
- Explanation (60 characters)
- Account number/account name
- Amount received or disbursed

Reports

- Overall transaction report (chronological list of all transactions for a month - includes starting and ending balances plus total receipts and disbursements)
- Account report (chronological list of all monthly transactions sorted by account, includes account financial summaries)
- Fund transfer report (monthly chronological list of all transfers of funds between accounts)
- Summary report (lists all accounts' initial balance, balance at close of previous month, total monthly receipts and disbursements, net transfers and end of month balance)
- Date to date account report (all activities for an account between any two dates)
- Search for a transaction based on virtually any element of data in the system.

Fully Interactive Chart of Accounts

Charity Ledger's chart of accounts is a very versatile tool. In addition to providing a place to enter new accounts and edit old ones, CLRS lets the user plot a fiscal year transaction history for any account or group of accounts.

New transactions and fund transfers also may be initiated right from the chart of accounts screen. Additionally, the user may set program preferences so that you can view the current balance of each account at any time.

Advanced Features

Charity Ledger with Donor Tracking

- "Fully Interactive" transaction register allows you to browse transactions and double-click on any item you wish to edit.
- One big transaction file broadens your ability to conduct very sophisticated searches on the entire year's data.
- All reports may be sent to an email recipient or exported for use in other Windows-based applications.
- The account database may be exported for use in other Windows products or may be emailed.
- There is no limit on the number of "parent" accounts or sub-accounts.
- No limit to number of transactions
- Every report can be previewed on the screen or sent to the printer
- Current account balances may be viewed on the chart of accounts at any time
- The "find transaction" function can search across all fields in a transaction to conduct very refined searches.
- "Linked transactions" are created whenever an existing transaction is edited or a transfer of funds is initiated. A key combination or mouse click will take you from an "original" transaction to its "successor" transaction(s)
- Accounts can be retrieved by name, number or from a pull down list.
- A standardized account number may be applied to each account - in addition to the traditional "account name" field - this will help some districts tie data back to their master chart of accounts without having to include the district account number in the account name field.
- CLRS includes a password protection system. Access to a secured account database is controlled by a user name and password that is entered once during each session with the program.
- CLRS includes an "Internet update" feature that allows you to check our web server periodically to download and install the latest maintenance updates. (An open Internet connection at your PC required.)
- An extensive on-line help system reduces your need to consult the hard-copy manual that accompanies the program.

Reports are Easier than Ever!

Charity Ledger offers its users great flexibility in generating reports. Each report provides a "selection screen" that permits considerable latitude in what data is included in the report and how it is presented.

Reports may be viewed on the screen or output to a printer. Reports may be printed in portrait or landscape mode. The user may define the fonts used for the header and body of each report.

Checkbook, Purchase Orders and Accounts Payable Features

Overview

Use *Charity Ledger* to issue purchase orders, track fund encumbrances and cash required to cover outstanding purchase orders, and pay bills with computer-generated checks. Checks and deposits are automatically posted to the general ledger maintained by CLRS.

Capacity

- Up to 50 account splits per check
- Up to 50 lines per purchase order
- Prints laser deposit slips
- Retains any number of outstanding purchase orders
- Unlimited number of transactions
- Supports multiple bank accounts

Reports

- Checkbook register
- Encumbrance summary report (lists funds encumbered for all accounts and shows the current balance and balance after encumbrances and payments)
- Purchase order summary report (lists outstanding purchase orders and displays details about encumbrances and payments)
- Detailed purchase order report (shows all data originally printed on a PO and the amount of payment made on each line of the purchase order to date)
- Outstanding check report
- Formal reconciliation report
- Vendor 1099 tracking report
- The checkbook and all reports may be exported for use with other programs.
- All reports and the account database may be sent to an email recipient - an excellent time-saver when communicating with district office staff or auditors!

Encumbrance Accounting and Purchase Order Management

You can take advantage of *Charity Ledger's* capacity to write purchase orders and encumber funds. You may charge one account for the entire purchase order - or charge different accounts for each line item. Funds are encumbered as the purchase order is written.

When goods are received, you can pay bills with computer-printed checks by pressing just a few keys. *Charity Ledger* dates, numbers and addresses the check to the vendor described in the purchase order. When you write a check it is recorded in your computerized check register - and the disbursement is automatically posted to the general ledger maintained by *Charity Ledger-Report System*.

Call 800-942-9008 today for more information about *Charity Ledger*.