KEV CONNECT

COURSE CATALOGUE
2019-2020

Table of Contents

Welcome

Welcome! Thank you for your interest in the KEV Connect Series. Our new series of interactive learning sessions will help your district and school staff learn from KEV trainers and industry experts on all areas of the *School Cash Suite* and the K-12 financial management industry.

We have been helping schools with their fund management needs for over 23 years and have gained a strong reputation of work efficiency, effectiveness, dedication and professionalism. We make sure that you get only the best and most reliable service available to help you with your day-to-day school cash management needs.

We can't wait to connect with you, and please feel free to contact us with any questions.

Sincerely,
The KEV Team

Overview

The KEV Connect series will allow you and your school administrative staff to have access to content developed by product and industry experts. This series includes a wide range of sessions that will change the way you operate the *School Cash Suite.* Here are a few of the benefits you will receive from membership.

- Unlimited training for your district and school staff throughout the year
- Be the first to learn about new features in the *School Cash Suite*
- Save hundreds of hours of school-level support by allowing us to train your school staff through our many refresher and advanced training sessions
- Save money by training your new school staff through our unlimited live webinars
- Drastically increase your online payment participation through marketing content that has led to proven success in hundreds of schools across North America
- Learn to better track your school activity funds through our sessions on industry best practices

CONTACT US

If you have any questions, please email us at kevconnect@kevgroup.com.

Audit

Deep Impact – Audit Tools

In this session we will utilize reports, searches, and screens to show the best audit tools to have at your disposal. We will also show you what to look for when doing or preparing for audits.

Monthly Audit Cheques & Balances

Learn about the different cheques and balances that can be implemented to help with the monthly audit tasks.

Product

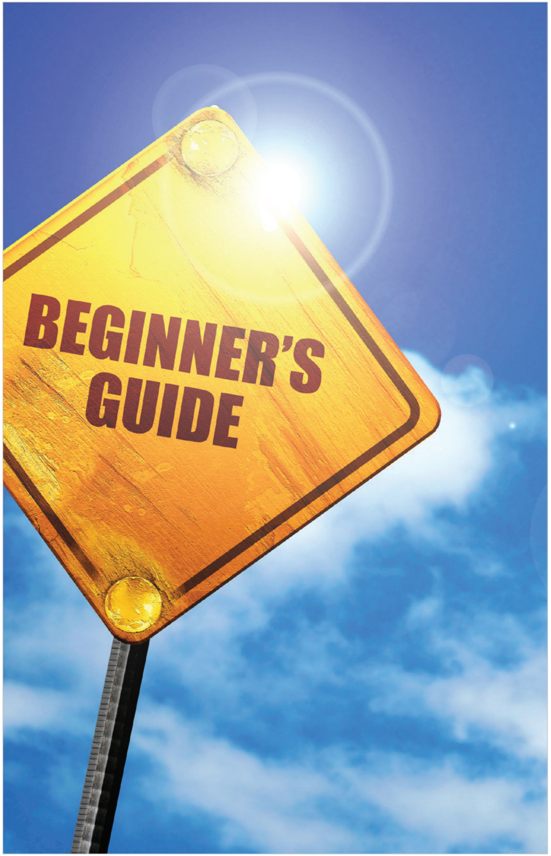
A Beginners Guide to *School Cash Accounting* - Issue Cheques

This is course 1 of 5 in the beginner series for *School Cash Accounting*. In the *School Cash Accounting* Issue Cheques course, you will learn how to create, print, and void cheques.

A Beginners Guide to *School Cash Accounting* - Deposits

This is course 2 of 5 in the beginner series for *School Cash Accounting.* In the*School Cash Accounting* Deposits course, you will learn how to complete deposit and receipts every time money is received.

Beginner Intermediate Advanced District Staff



A Beginners Guide to *School Cash Accounting* - Ledger & Reports

This is course 3 of 5 in the beginner series for *School Cash Accounting*. In the *School Cash Accounting* Ledgers & Reports course, you will learn how to use the ledger module as well as the different reports available including those most frequently used.

A Beginners Guide to *School Cash Accounting* - NSF & Transfers

This is course 4 of 5 in the beginner series for *School Cash Accounting*. In the *School Cash Accounting* NSF & Transfers course, you will learn how to track NSF cheques and perform transfers of funds from one category to another.

A Beginners Guide to *School Cash Accounting* - Reconciliation

This is course 5 of 5 in the beginner series for *School Cash Accounting*. In the *School Cash Accounting* Reconciliation course, you will learn how to reconcile your monthly bank statements.

A Beginners Guide to *School Cash Catalogue* - Part 1

The *School Cash Catalogue* beginner course will take you through *School Cash Catalogue* and review all functionality of the module. This is a great session for both those who have had training some time ago or are brand new to *School Cash Catalogue*.

A Beginners Guide to *School Cash Catalogue* - Part 2

This is the second part of the *School Cash Catalogue* beginner course. It will take you through reporting and additional functionality that was not covered in part 1.

A Beginners Guide to *School Cash Register*

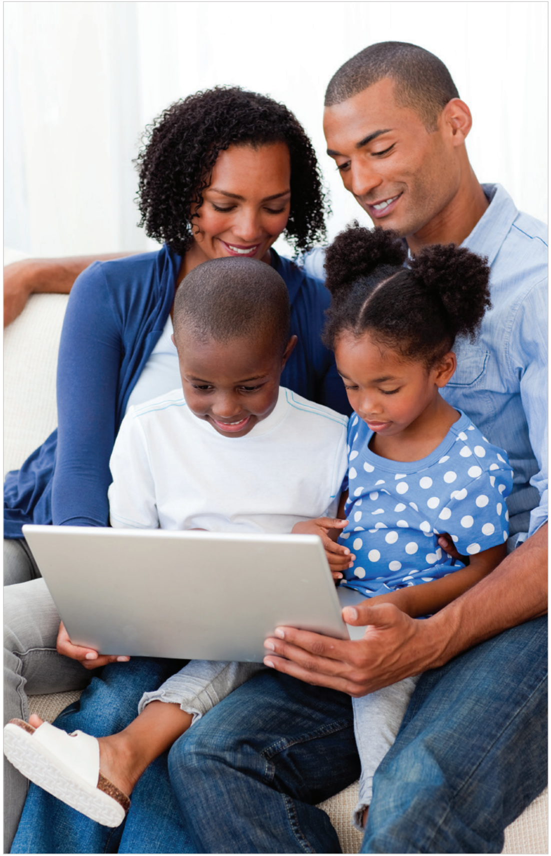
This course will take you through *School Cash Register* and review all functionality of the module. This is a great session for both those who have had training some time ago or are brand new to *School Cash Register*.

Beginner's Guide to Group Collection and *School Cash Catalogue* Reports

Learn how to create a group collection for items where a staff member has items created and collected. These funds are transferred to the office for recording. A Group Collection will allow the bookkeeper to record the payments in the *School Cash Register* without having to select each student separately.

Program Maintenance

In this session we will show you how to maintain board and district settings. We will review setting your user maintenance, roles, and security levels. The best use of the table lookup, and assigning umbrella type to categories.



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Experts Guide to *School Cash Accounting*

Know all there is to know about *School Cash Accounting*? We can never stop learning about the many advanced features available to us in this area of the *School Cash Suite*! This session will show you how to utilize some of the advanced features of *School Cash Accounting* that you never knew existed.

Experts Guide to *School Cash Catalogue*

This session is ideal for districts utilizing online payments who would like to create more complex items. Full cycle processes such as rejected payments will be explored as well as tips for maintenance of groups (student lists) in the *School Cash Catalogue*.

Experts Guide to *School Cash Register*

How should money received be counted? How does it get onto the ledger? We will share with you many advanced level tips and tricks to ensure your schools use this module properly. This session covers troubleshooting and many other *School Cash Register* features.

Reporting for Experts

Learn how you can use custom reports to fit the unique needs of your district on *School Cash Accounting*.

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Cashbox - School and Board Petty Cash

In this session we will explore the different avenues a school/district can take in managing their petty cashboxes. We will review replenishing cashbox with School Generated Funds, and Schools who submit reports to the district for reimbursement. Come and learn how to manage and care for your cash.

Transfers vs. Debits & Credits vs. Journal Entries: The Struggle Continues

Confused between when to use Transfer Entries versus Journal Entries? This session will go over the key differences and explain the situations in which each module should be used.

Petty Cash Reimbursement Made Easy

Refund, Report, Reimburse, Redistribute. That's how easy it is to use KEV's GL/Petty Cash reimbursement module. Whether you have a separate bank account for board petty cash, or you combine it with school activity funds; KEV provides an amazing timesaver for school users. This session will cover the ins and outs of the Petty Cash reimbursement Module.

Parallel Dimensions: Multi-Year Catalogue

Usually, in the latter half of the current school year, we start preparing for the next year by scheduling students and registering new students. Creating multiple-year fees allows you to create next year's fees today. You will learn how to work in two school years at once.

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Excel - Friend or Foe? Level 1

KEV staff will share their tips on how you can make the most of the *School Cash Catalogue* reports with a little bit of support from Microsoft Excel.

Excel - Friend or Foe? Level 2

In this second part of the Excel – Friend or Foe series, take your Excel knowledge to the next level. Learning how to create and use pivot tables is just one of the topics covered in this brand-new session.

Parent Shopping Experience

See how parents use *School Cash Online* for online payment. Learn how to set up your item so parents get the most from Online Shopping!

Streamline your Approval Process

This training session will go over KEV's new auto-approval workflow designed for the Issue Cheques and the Purchase Order modules.

Account Settings

Learn more about Account Settings and what they mean. It may have been some time since you last looked at these settings. Come get refreshed on School Cash.

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Year-End – Always Be Prepared

Learn from our experts who have survived many years of rollovers. Who needs to know the check list? What and when to prepare. Where to identify potential data issues before you start and how to review.

Year-End – This is How You Roll

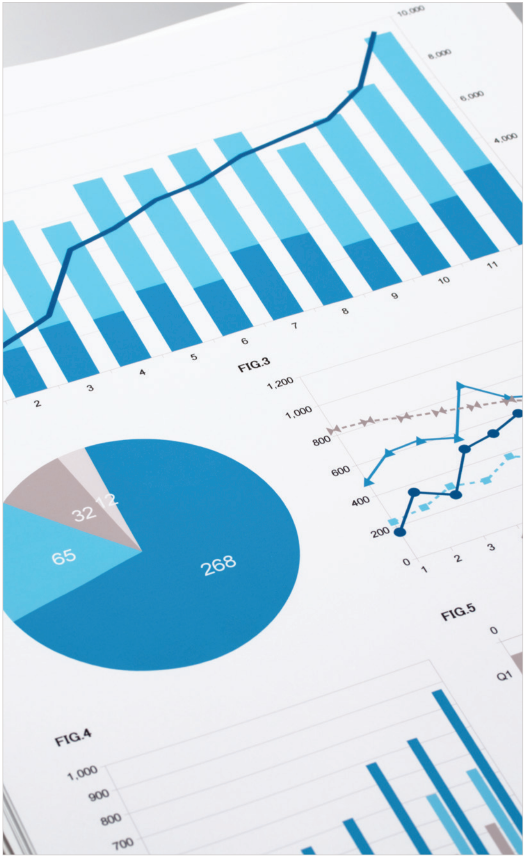
In this session we will share our tips and tricks on how district and school staff can save time and resources during their year-end rollover process.

 Year-End - Troubleshooting

In this session we will share our troubleshooting tips on your Year-End Rollover. This is an engaging and interactive session.

 Cash Management Controls and Best Practices

A key element to establishing best practices is understanding that policies and procedures are put into place to protect everyone in the organization. This session will cover the internal controls that every district should have.



Reducing the Risk of Theft

Stop it before it goes too far! Early detection is the best means to fight cash theft. We'll explore real school examples of how it happens, and what you can do to reduce its likelihood.

Best Practices for Schools

Learn how to optimize the *School Cash Suite* and save time by following best practices for bookkeeping.

Preparing your Catalogue - Ready for the School Year

Let our experts take you through the steps of preparing your Catalogue for the up and coming school year.

Red Flags & Real Stories

This brand-new session will highlight 6 real fraud cases of cash handling in schools. Gain critical insights into what you can do to prevent this from happening.

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Marketing

Steps and Strategies

What's in it for me?" Discover how *School Cash Online* benefits everyone in your schools, from principals to teachers, to students. Learn proven marketing strategies focused on getting everyone on board.

Marketing Tips, Tricks and More for *School Cash Online*

In this session, we will show best practices, tips, and basic marketing strategies that you can implement to ensure parents are in the know.

The Social Experiment – Posts, Tweets, Likes and Shares

Learn how other school districts are using social media to promote online payments, reduce the cash coming in schools and simplify the complexity of it all.

Let's Put the 'Fun' Back in Fundraiser

Learn how you can use the *School Cash Suite* to develop and market successful fundraising campaigns for your schools and increase your revenues.

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New for 2019

District Level Reports

Discover how district level reports efficiently allow district staff to run reports that consolidate information from all your schools. These include year-end report information, bank reconciliation reports, NSF reports, customized transaction report, and more.

Year-End – Automated Year End Rollover

This session will demonstrate the newly automated Year End Rollover process. KEV will share tips and tricks on how district and school staff can save time and resources during their year-end rollover process.

How to use Freshdesk

This session will review the registration process, ticket search, tracking your tickets, and how to use the resources available in Freshdesk.

School Cash Refresh - has a review taken place lately?

This session will provide information on processing adoption reports, marketing reminders, *School Cash Accounting* reminders and *School Cash Catalogue* review.

Excel - Friend or Foe? Level 3

Continue your excel journey and take it to the next level. Our level 3 session builds on all you have learned. We will take our spreadsheets and build amazing graphs with School Cash Data. Add visuals to your excel reports.

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How do you Measure Success? - Adoption/Usage – How & What

What are the tools within the *School Cash Suite* that the School User and/or the District Level User can access to measure how they are doing with parent engagement and online payments. From Adoption Rates, Payments, Usage and Comparisons, we'll show you the quick and easy ways for you to look up reports and access information. We'll also have some good success stories to share with you, and examples of what has been working for other Districts.

Recurring Payments and Public Facing/Unlisted - Why & How

Learn how to set up a scheduled payment in the *School Cash Catalogue* to you and the parent community the option to customize recurring payments for larger ticket items. We will also review the public facing feature. What is "public facing"? When should I use the public facing feature? What are best practices when creating a public item?

School Cash Catalogue Item Creation Using Scheduled Payments and Public Items

Learn how to set up a scheduled payment in the *School Cash Catalogue* to you and the parent community the option to customize recurring payments for larger ticket items. We will also review the public facing feature. What is "public facing"? When should I use the public facing feature? What are best practices when creating a public item?

Blue Pay Credit Card Reconciliation - District Staff only

Let KEV help in making your Blue Pay Credit Card reconciliation a breeze. Learn about our detailed reports: School Cash Payment Processor, Batch Report, Auto Cost Recovery, and Donations. This session will be using pivot tables. We recommend attending the Excel Friend or Foe Level 2 session prior.

Pre-requisites: Blue Pay Merchant Services, Excel Level 2


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School Cash Simplified
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