EduTrakConnect
Bits & Bytes

IMPORTANT INFORMATION

This issue includes important Year End Process information

Look for future newsletters in September and January
We hope you enjoy and find it informative!

Article Topics

- End of Year tasks
- Support hours
- Did you know?
- A letter from our Co-CEO
- Employee Spotlight - Highlighting Stan Buss and Greg Knight from our Customer Success Department

Mark Your Calendars for End of Year Tasks!

It's almost time to do your **Year End Process**! The Year End Process (YEP) should be done each year, at the end of your school year. For schools who use the Food Service module, the YEP will assist you with deleting students and families who are not returning to your school, as well as placing your year end reports in a backup, so they are easily accessible in the future. It is important that the YEP be done with the assistance of an EduTrak support technician.

For schools who use a DataBridge, a second appointment (called a Data Rollover Meeting or DRM) will be necessary. (If you do not use the Food Service module, the DRM is the only appointment you will need.) During the DRM, we will ensure your enrollment numbers are correct and your DataBridge is up to date. We will also promote your students to the next grade and adjust for any school or grade changes. The YEP appointment should be done before your Student Information System (SIS) rollover is done. The DRM appointment needs to be done after your SIS rollover.

To schedule your YEP, click the following link and select your preferred date and time:

Click here to schedule!

To schedule your DRM, click the following link and select your preferred date and time:

Click here to schedule!

Free & Reduced Online Application Users

☑ Put in a support ticket to disable your application for the summer

☑ Send a new link to us for your 2024-2025 paper application so we can put it online

☑ Put in a support ticket to re-enable your online application

☑ Please remember each state may have different requirements for renewal of the online application. Please take necessary steps to make sure you are compliant.

EduTrakConnect

We Support You!

Our summer tech support hours will remain the same: 8 am to 5 pm CT. To request help, please create a support ticket. This is done on the Admin Site, under the Support tab>Contact Support. You may also call us at 1.800.934.2621. Please have your TeamViewer up and ready when you call.
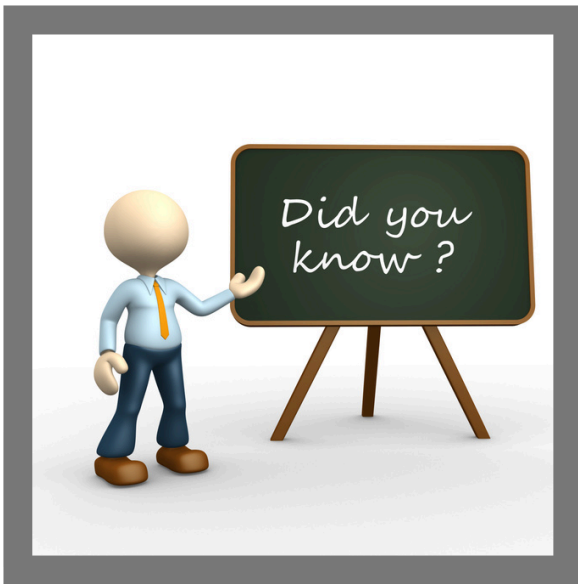
*** Please note that summer and early fall is a busy time for us. If you reach our voicemail, please listen carefully to the options and choose the correct one. This will help expedite your request. We will get back to you promptly.*

From our Team to Yours!

All of us at EduTrak LLC. are very grateful to you, our customers! We hope you have a wonderful summer.

EduTrakConnect

EduTrak's Innovative Payment Solutions

Online Payments:

Did you know that parents can make payments through EduTrak's online parent portal, which posts transactions to the serving line within five minutes and immediately reflects paid fees? Our PCI-compliant service ensures swift and secure payments, offering a streamlined experience for both parents and schools.
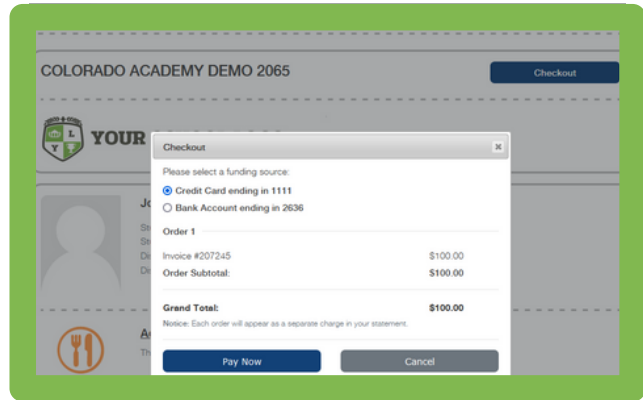
Student Fee Simple:

Our "Student Fee Simple" module gives schools a simple, user-friendly fee collection tool that makes paying and managing fees effortless for parents. With its intuitive design, this solution reduces administrative overhead and offers a hassle-free experience, making fee collection easy—it's really that simple!

EduTrakConnect
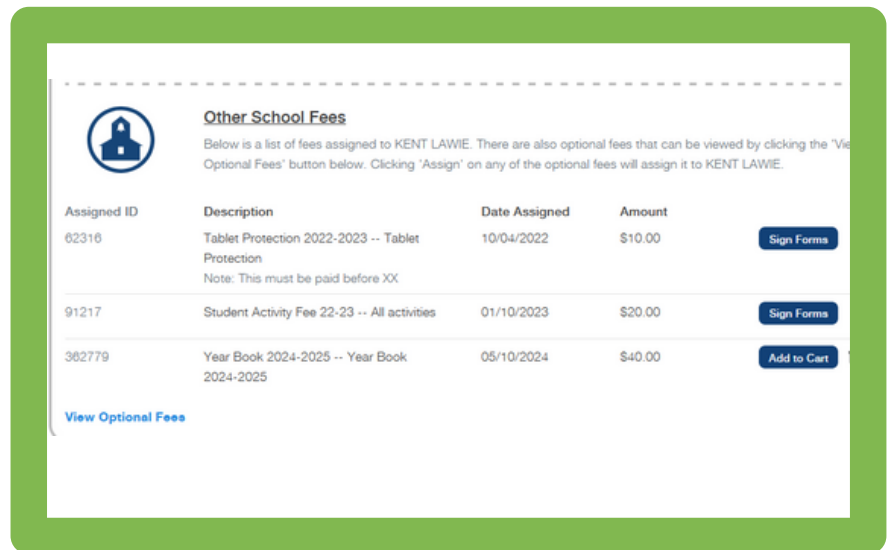
A letter from our co-CEO David Belford

Greetings to all our wonderful customers, both long-term and new! Over the past two years, we have successfully integrated teams and resources to form one solid EduTrak LLC. I am thrilled to be working alongside our exceptional team. The company culture here is remarkable; we support and trust one another, sharing success and failure equally. This unity extends to the service we provide, treating our customers as part of our extended family.

In an era of rapid growth and corporate consolidation, companies like ours are rare. Our belief in our product sets us apart—not just the software, but its delivery, usage, training resources, and responsiveness. Our mission is for EduTrak to set the standard for customer service in our market.

Since Covid-19, remote working has expanded our talent pool, leading to excellent hires. One thing we have always said is that if you leave this company, formerly Wordware, you will leave with more capability, experience, and value than when you came in. At EduTrak, this has been amplified even further.

This past year, we have been working on EduTrak University, a platform offering classes on all our modules, products, and services, which we are launching internally. It is designed to elevate our knowledge and understanding of the products. Our hope is to make a version of these classes available to our customers in the coming year.

Many companies have tried to consolidate software solutions for K-12 that encompass various departments. There is a constant battle between simplicity and functionality. What we are doing here is answering the "why." Why use EduTrak Software vs. anyone else? Because we provide more functionality and simplicity with our product. The product is the software, the modules, the people, and the service.

Our Billing product, entering its third year, is about to take off. It handles tuition, childcare, community education registrations and billing, and more. It can create billing agreements for large commitments like band camps or foreign exchange trips and serve as a full-scale tuition management tool. This product sits at the core of EduTrak Connect, integrating with the Student Information System, our user and payments processing, and all our other apps.

On the Nutrition front, we are excited about the new ESC1000, replacing the LCS1000. This version of the Food Service Point of Sale system includes features like pre-order and ring-by-picture selection. It also has a new OS with enhanced security, better syncing, and a more robust DataBridge. Our AI-driven serving line project, FasTrak (patent pending EduTrak LLC 2024), allows students to ring themselves up, supports facial recognition, and determines meal eligibility and selection. We have launched beta sites in Minnesota, and it's progressing well. Our goal is to streamline lunch processing times and free up staff in the lunchroom.

FasTrak in action!
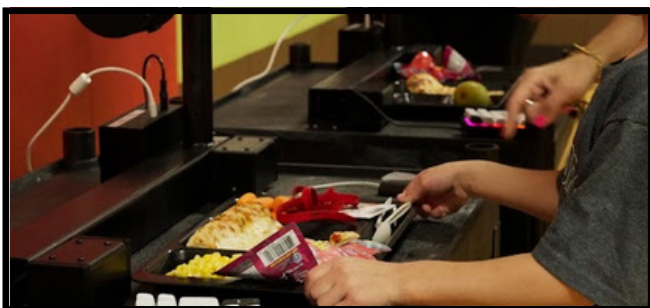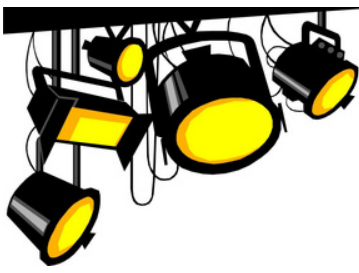
Employee Spotlight

Meet Stan Buss ~ Customer Success Manager

What inspired you to join the EduTrak team, and what do you enjoy most about your role as Customer Success Manager?

- The EduTrak team is a close-knit team. I wanted to be part of a team where everyone was on board with the vision of the product. That is definitely the case here. As Customer Success Manager, I thoroughly enjoy interacting with customers and ensuring they are getting the most out of their configuration and understand how they can do just that. Developing relationships with others is something I love!

Can you share a memorable success story or achievement from your time at EduTrak?

- I am not sure if I can pinpoint it to an individual story, but it is always great after a conversation with customers where we are able to reach a solution to a problem that has been bugging them for some time. Being able to make customers' lives easier and help them out is always a great feeling!

When you're not busy helping our customers succeed, what are your favorite hobbies or activities outside of work?

- Outside of work, I enjoy golfing, playing chess, watching or playing different sports, being outside… etc. etc.

What's one piece of advice you would give to someone starting out in a customer success role?

- Be an advocate for the customer. You want to make sure they are getting the most of the service that is being provided. Ultimately, it is in the name–ensure the customer's success!

Tell us about a project or initiative you're currently working on that excites you the most.

- Updating our CRM to better improve the onboarding experience for new customers.

If you could have any superpower to help you in your job, what would it be and why?

- It would be great to be all-knowing! Sometimes there are features a school is using simply because they do not know there is a more efficient and effective way to complete their task. When we reach out and ask how everything is going, seemingly everything may be going great! But if the success team was all-knowing, we would know exactly the areas to ensure your success!

What's something about you that your colleagues might be surprised to learn?

- I love music and singing! I have been in choir all the way through college and enjoy singing along with my favorite songs. I also was part of a few plays and musicals, too!

Share with us one of your favorite quotes or mantras that keeps you motivated both at work and in life.

- "If everyone is moving forward together, then success takes care of itself." – Henry Ford

EduTrakConnect
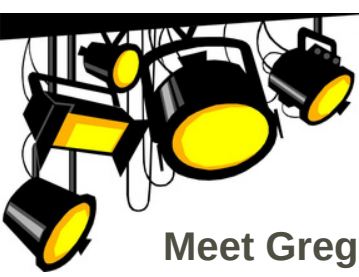
Employee Spotlight

Meet Greg Knight ~ Customer Success Specialist

What inspired you to join the EduTrak team, and what do you enjoy most about your role as Customer Success Specialist?

- My wife Karen is a long-term employee of EduTrak and I heard plenty about the product, people, and the company from her. Karen's standards are high and she had only good things to say about the company, her team, and the schools she supports. The more I heard, the more I wanted to join EduTrak as well! Though my previous experience in the military and manufacturing was not a direct translation to the role I am now in, I felt I had the tools and ability to help EduTrak continue to grow and be successful in serving schools. I have really enjoyed being part of this team. I also have enjoyed getting to know people at the schools and helping them get settled in (onboarding) and helping them best utilize our software (Support).

Can you share a memorable success story or achievement from your time at EduTrak?

- Last year, my first with EduTrak, our onboarding team, which I had just joined, brought on over 20 new schools. This was a bit of a trial by fire method of learning. In the end, with the tremendous support of the whole EduTrak team, all these schools were online for the start of the school year.

When you're not busy helping our customers succeed, what are your hobbies and activities outside of work?

- I, and my wife, love attending concerts, sporting events, traveling and doing things with our family.

What's one piece of advice you would give to someone starting out in a customer success role?

- Try to understand and empathize with our customers. We succeed when our schools succeed!

Tell us about a project or initiative you're currently working on that excites you the most.

- Stan and I have been working on how we organize tickets and tasks in our CRM (Hubspot) to improve the visibility and efficiency of our workflows. An added benefit I am excited about that should yield from this project is better KPIs to evaluate our effectiveness.

If you could have any superpower to help you in your job, what would it be and why?

- I would love to be able to multitask at a very high level. This job many times has tasks coming from multiple sources, all with a high sense of urgency.

What's something about you that your colleagues might be surprised to learn?

- I love food from all over the world and am pretty adventurous with the foods I will try.

Share with us one of your favorite quotes or mantras that keeps you motivated both at work and in life.

- Failure is not an option!

EduTrakConnect