What's New in *Shepherd's Staff 2007*

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Attendance (16 features/enhancements)

1. Absentees Report -- You can now search for one or more Attendance Types. (1844)

2. Absentees Report – Layout/font/readability enhancements. (1849)

3. Absentees Report – Now includes the Last Time Attended. (Also, e-mail address is now optional.) (1848)

4. Absentees Report – When creating a Static subgroup from the report, the default subgroup name now includes the report date range instead of today's date. (1845)

5. Absentees Report – Includes the new Cell Phone field from the Person Record. Unlisted cell phones can be excluded, or marked with "(UL)". (1847)

6. Attendance Detail Records grid – Fast Facts button added, so you can *quickly* view basic information about any attendee (address, phone, birth date, marital status, photo, skills/gifts, employer, most recent event attended, etc.), without having to open the Membership module. (1910)

7. Attendance Follow-up Report – Includes the new Cell Phone field from the Person Record. (1851)

8. Attendance Follow-up Report – Now includes birth month/day and "Member since <year>". (1851)

9. Attendance Follow-up Report – Now automatically filters out Removed people from the report, without having to build a subgroup. (1851)

10. Attendance Follow-up Report – Layout/font/readability enhancements. (1851)

11. Attendance Summary Records grid -- Fast Facts button added, so you can *quickly* view basic information about any attendee (address, phone, birth date, marital status, photo, skills/gifts, employer, most recent event attended, etc.), without having to open the Membership module. (1911)

12. Attendance Event Enrollees – New feature called "Enrollees", that lets you assign people to any Event. From then on, when you add an Attendance Batch for an Event, the list of Possible Attendees *automatically* starts out with those enrollees, saving you time. This new feature includes a new report, and also includes simple tools that enroll/un-enroll people for you (so you don't have to manually assign each person). The new report is actually six reports in one:

    - Enrollee Attendance Checklist
    - Enrollee Contact List
    - Enrollees not attending for the last <n> days
    - Non-enrolled Members attending at least twice in the past 30 days
    - Other Non-enrolled persons attending at least twice in the past 30 days

- Potential enrollees (non-removed people who are not currently enrolled), searchable by gender, Membership status, and age range (1858, 1908)

13. Attendance – Posting Batches – To supplement existing safeguards against posting a batch for the wrong date (because this mistake still occurs), we've added the following information to the "Post batch?" message: a) The date of the batch, including the day of the week, b) the name of the Event. (1903)

14. Reports list – You can now access Membership mailing labels from the Attendance reports list, without having to open the Membership module. It appears as "Labels (mailing labels)". (1942)

15. Reports list – You can now access the Membership "Sunday_School/Church Class Roster" report from the Attendance reports list, without having to open the Membership module. (1831)

16. Attendance Year End -- Added an additional safety check to prevent some users from accidentally purging all Attendance Detail records. If the user chooses a cut-off date less than 24 months ago (the recommended minimum time frame to keep attendance records), the following message appears: "WARNING! You have chosen to delete Attendance Detail newer than 24 months (2 years) ago. This is not recommended. Some reports (such as the Absentees report) will not work as expected if you do not have attendance detail history. Do you wish to continue, anyway?" (1781)

Contributions (23 features/enhancements)

1. Contributor Offering Summary Report – Now displays the "Last Date Contributed in Date Range" for each fund, instead of just for the first fund. (1890)

2. Contributor Offering Summary Report – Layout/font/readability enhancements. (1890)

3. Contribution Analysis Report – New section under Grand Totals that displays the total offerings applied to a pledge, and the total offerings *not* applied to a pledge (i.e., total "pledged" and "unpledged" offerings). (1811, FP1)

4. Contribution Fund Records – You can now mark a Contribution Fund as "Inactive", which does the following:

    - Prevents that fund from appearing in the Fund choice list when entering or editing an Offering Batch.
    - Triggers a warning if you try to Import an offering batch that references that fund.
    - Displays the fund with a different color (black on cyan) on the Contribution Funds grid.
    - Flags inactive funds with an asterisk on the Contribution Fund List report. In addition, you can now print the report for just active or just inactive funds. (1918)

5. Contributor Details window -- Fast Facts buttons added, so you can *quickly* view basic information about any contributor (address, phone, birth date, marital status, photo, skills/gifts, employer, most recent event attended, etc.), without having to open the Membership module. (1945)

6. Contributor Records grid – Two new checkbox columns have been added indicating if one or both contributors have been marked as Removed in Membership, without having to open the Membership module. (This is useful for determining which contributors to mark as "Skip Renum.", so that you don't use up envelope sets for people who will not be contributing next year.) (1944)

7. Contributor List Report – Layout/font/readability enhancements. (1931)

8. Contributor List Report – New Envelope Range feature that lets you print just a selected range of envelopes. (1930)

9. Pledge Records grid – New fast-link button to the Offering Records grid. Highlighting a pledge and clicking the button displays the Offering Records grid, showing just the offerings attached to that pledge. (You can then print the records.) (1933)

10. Yearly Summary Records grid -- New fast-link button to the Offering Records grid. Highlighting a summary and clicking the button displays the Offering Records grid, showing just the offerings attached to that yearly summary. (You can then print the records.) (1933)

11. Daily Fund Totals grid -- New fast-link button to the Offering Records grid. Highlighting a Daily Fund Total and clicking the button displays the Offering Records grid, showing just the offerings attached to that fund total record. (You can then print the records.) (1933)

12. Offering Records grid reports – New report style that groups/sorts by Envelope. (1929)

13. Offering Records grid reports – Layout/font/readability enhancements. (1929)

14. Pledge Records grid – New column named "Entered on" that displays the date the pledge was entered into the program. In addition, the Find window has a new "Pledge entered from / to" option so you can display (and print) just the pledges entered during a specific date range. Note: One use of this feature is identifying how many people "pre-pledged" for a particular year by searching for current-year pledges that were entered last year. (1926)

15. Pledge Records grid report – Three new columns appear on the report: Pledged-to-date, Total Pledged, and the Difference between given and pledged-to-date. Each of the three columns is totaled at the end of the report. (1927)

16. Pledge Records grid report – Three new calculations appear on the report: count of pledges in the report, count of unique contributors in the report, and count of unique funds in the report. (1927)

17. Pledge Records grid report – Layout/font/readability enhancements. (1927)

18. Utilities – Change Default Printer -- For four of the Contributions grids (Contributor Records, Pledge Records, Yearly Summary Records, and Daily Fund Totals), when you click Print you get a Printer Setup window every single time. (This is the Setup window where you **do not** select fonts; the one where you can select fonts is not within the scope of this enhancement.) This can be annoying, especially if you only have one printer that you ever use. So, the pop-up has been replaced by a new menu item under Utilities named "Change Default Printer". (1928)

19. Reports list – You can now access Membership mailing labels from the Contributions reports list, without having to open the Membership module. It appears as "Labels (mailing labels)". (1942)

20. Statements (previewable) – For churches in Canada, the previewable statements have been updated to include the name and web site for the Canada Revenue Service, per their new statement requirements starting in 2007. (1880)

21. Statements (previewable) – Due to new Postal Regulations (May 2005) regarding bulk mailing rates/requirements, the "Ahead/Behind" fields that appear when including pledge information on the statements is causing issues with *some* post masters (depending on how the regulations are interpreted). To prevent any problems for our customers, we've added a new option, in the "Ahead/Behind" list under Pledge Terminology (on the Report folder), called "<Do not show>". Selecting this option prevents the difference and its caption from showing on the statements. (1840)

22. Utilities – Fix a Batch Posted to the Wrong Date – Sometimes a user will accidentally post an offering batch to the wrong date, so we've added a new utility named "Fix a Batch Posted to the Wrong Date" that let's you quickly correct the problem. (1925)

23. Mail Merge -- Since the Membership Mail Merge report lets you do contributions exports, we should show that report in Contributions, as well. (1984)

Finance (8 features/enhancements)

1. General Ledger Report – Layout/font/readability enhancements. (In addition, the layout changes should save paper for some report styles. For example, in our tests the "Include check description" version of the Details report required 16% fewer pages, and the Summary report required 41% fewer pages.) (1951)

2. Utilities – Rebalance – Though you should ***never*** have to run Rebalance during normal operation of version 7.5, you can now run Rebalance for two fiscal years in the future. This may be needed in very rare cases (e.g., customers who update from very old versions of the program where balance problems already exist, or database errors caused by a power loss). (1921)

3. Vendor Directory Report -- Layout/font/readability enhancements. (1899)

4. Vendor Record window – New folder titled "Checks" which displays all checks written to that vendor, across all bank accounts. (1934)

5. Vendor Payments Report – Layout/font/readability enhancements. (1898)

6. Recurrent Transactions Report -- Layout/font/readability enhancements. (1950)

7. Budget Import – Audit Log entries are now made recording any budget import, and whether or not errors occurred during the import. (1979)

8. Desktop feature – You can now choose to start up Finance with certain windows already opened for you, as you have laid them out on the screen. (1981, etc.)

General/System-wide (1 feature/enhancement)

1. Print Preview window – The Print Preview window now responds to the mouse scroll wheel! The wheel by itself scrolls the currently displayed preview window (when in full/close zoom), and the click-scroll feature scrolls through the report pages. (1815, FP1)

Main Menu (1 feature/enhancement)

1. Import Membership Data – When importing, the "Include this person in MemberConnect" box on the Person Record is automatically checked if the person is a Member. (This is much more convenient for new customers than having to use the Mass Update utility.) (1795)

Membership (36 features/enhancements)

1. Activities/Skills/Training grids – You can now print the contents of any of the three grids. (1765)

2. Activities/Skills/Training grids – New "Find" feature letting you filter the contents of any of the three grids (and then print those results, using the new Print button). (1808)

3. Activities/Skills/Training grids – New column on each grid for the new Cell Phone field from the Person Record (1827).

4. Activities/Skills/Training grids – For the Home Phone column, if a phone number is unlisted, "UL" now appears before the number. (1828)

5. Activities/Skills/Training grids -- Fast Facts button added to each grid, so you can *quickly* view basic information about any attendee (address, phone, birth date, marital status, photo, skills/gifts, employer, most recent event attended, etc.), without having to open the Person Record. (1912)

6. Activities/Skills/Training Report – New Cell Phone field (from the Person Record) added to the report. (1875)

7. Activities/Skills/Training Report – Layout/font/readability enhancements. (1875)

8. Anniversaries Report – New Copy button for copying the names and dates from the report into another program, so you can easily insert that information into your church bulletin. (1854)

9. Anniversaries Report – Layout/font/readability enhancements. (1854)

10. Anniversaries Report – New Cell Phone field (from the Person Record) added to most report styles. (1854)

11. Anniversaries Report -- Labels – Due to the limited quantity of labels normally printed, barcodes no longer print unless you specifically choose to do so. (This gives the labels a more "church-member-friendly" appearance.) (1920)

12. Church Directory Report -- Layout/font/readability enhancements for most versions of the report. These changes may also reduce the page count for some versions; for example, in our tests there were up to 28% fewer pages needed for the "By Household" directory, and up to 16% fewer pages needed for the "Household – 2 columns" directory. (1869, SP3)

13. Church Roster Report -- Layout/font/readability enhancements for the non-rotary-card versions of the report (exception: "By Household—More than 10 family members"). These changes may also reduce the page count; for example, in our tests there were up to 28% fewer pages needed for certain styles, depending on your report settings. (1872)

14. ELCA Annual Report – We've added the "ELCA Congregation Report" for those churches that are members of the Evangelical Lutheran Churches of America. (1835, FP1)

15. Household Record Report – Added the new Cell Phone field to each person in the household, and added Personal E-mail Address to the standard Household version of the report, among other improvements. (1900)

16. Household Record, Address folder – To clear up confusion about how to enter unknown addresses, we've added an "Address Unknown" button that appears when adding a new household. Clicking this button enters a "dummy" address for you (with the word "<UNKNOWN>" in the address line), so that unknown addresses are entered in a consistent manner. (1866)

17. Households grid, Address/Phone folder – Now includes anyone in the household who has contact information (Cell Phone, Work Phone, E-mail), along with that information, so that you don't have to go to each household member's Person Record. (1819)

18. Inactivity Report – With the new “Static” button you can easily create a subgroup for people in the report (and then use that subgroup as the source for any other report, labels, etc.). (1863)

19. Inactivity Report – New Cell Phone field (from the Person Record) added to the report, and the versions that group by Ministry Group and Person Assigned now print the name of the group in the lower right of the page. Plus, a “person count” has been added to the print out. (1868)

20. Inactivity Report -- When choosing "Members only" on the Inactivity report, the report now excludes any Members who where were received *after* the cut-off date (the "to" date), since they were not a Member before that point. (1974)

21. Inactivity Report – Layout/font/readability enhancements. (1863)

22. LCMS Annual Report – We’ve added the new “LCMS Congregational Statistics Report” for those churches that are members of the Lutheran Church Missouri Synod. The report reflects the latest statistical data required by Rosters and Statistics. (1821, FP1)

23. Church Phone Book – *Brand new report* containing four different report styles. Each style can be sorted alphabetically, or grouped by Ministry Group or Person Assigned.
    a. **By Household** -- Prints people grouped by household, and can be expanded to include household address, e-mail addresses, birth month/day, and child age (making it an excellent substitute for the Church Directory report).

    b. **By Person** -- Prints people with one person per row (unless you “Include e-mail address(es)”, which prints two rows for those who have an e-mail address). It can also include birth month/day.

    c. **By Person (2 columns)** -- Prints people in two columns down the page, and can be expanded to include e-mail addresses, birth month/day, and wedding anniversary month/day.

    d. **By Person (all phone numbers)** -- Prints people in three columns down the page, and has a built-in filter that automatically excludes people who don’t have a phone number, or (if e-mail addresses are included) who don’t have an e-mail address. It can be expanded to include birth month/day. Most importantly, as the name indicates, it prints ALL phone numbers for each person (a much-requested feature from you, our customers). (1653)

24. People grid – The grid now excludes Removed persons by default. Just check the “Show Removed persons” checkbox, located under the grid, to add those people to the grid. (1860)

25. People grid – Removed persons, when shown in the grid, are now “flagged” with color; the row displays as black on cyan. (1867)

26. People grid, Address/Phone folder – Work phone is now included in the Phone list (as is the new Cell Phone field), in addition to displaying the phone numbers for the selected address. (1817)

27. Person Record – Add a new, dedicated Cell Phone field to the Phone folder of the Person Record, to take the place of the “MOBILE” phones entered in the phone grid. (Those MOBILE phone numbers were attached to the address, and not to that specific person.) From a design point of view, this allows us to *accurately*, *reliably* identify the Cell Phone for any person, and to include that phone number on any report or window. (1816)

28. Person Record – Work phones can now be marked as “unlisted”. Also, the Work Phone has been duplicated from the Work folder to the Phone folder. You can still see it on the Work folder, but all changes are now made on the Phone folder, with the other phone numbers. (1824, 1820)

29. Person Record – New warning to remind users to not mark Removed members as “non-members” – they are “removed members”, not “removed non-members”. (1843)

30. Person Record – On the Personal folder there is a new “Subgroups” button, which displays the “Subgroups by Person” report with that person automatically selected. (1850)

31. Person Record – You can now choose to default new Person Records to “Non-member” instead of “Member” (it’s a new option under the Membership Settings, off the Main Menu). (1919)

32. Person Record Report -- New Cell Phone field (from the Person Record) added, and also a place for the new Work Phone “is listed” field. (1902)

33. Person Record Report -- Layout/font/readability enhancements. For the “blank form”, more space has been created, to make it easier for people to write in the data. (1902)

34. Statistics – New “median age” calculations have been added for both the “Members” and “All People” folders. (“Median”, of course, is not the same as “Mean” or “Average”. We determine the *middle* age, where half of the people are above that age and half below it, as opposed to “average”, where we just add up the ages and divide by the number of people.) (1922)

35. United Methodist Annual Reports – Table I and II have been updated with the latest changes. In addition, a new “self-check” tools have been added to help track down discrepancies. (1796, FP1)

36. Desktop feature – You can now choose to start up Membership with certain windows already opened for you, as you have laid them out on the screen. (1981)

Scheduler (1 feature/enhancement)

1. Delinquent Loans – A notification automatically appears when you start the Scheduler module and there are overdue inventory/equipment loans. (1936)

Subgroups (4 features/enhancements)

1. Subgroups grid – New “People” folder has been added; clicking the folder displays a list of all the people in the subgroup (without having to preview a report). In addition, you can use the new “Fast Facts” feature to quickly view details about any person in the list. (1939)

2. Subgroups grid – New Mailing Labels button that displays the Mailing Labels report, with the highlighted subgroup pre-selected on the report window. (1941)

3. Subgroups grid Report – New column added to display the person age (but only if the person is between 0 and 20 years old, inclusive). (1938)

4. Subgroups grid Report -- Layout/font/readability enhancements. (1937)

General/System-wide (1 feature/enhancement)

1. Utilities – Membership, Attendance, Contributions, Finance and Scheduler now have a “Change Default Print” under their Utilities menu. (1977, 1978)