



## **Shepherd's Staff 2010 Feature Preview**

With more than 100 new features and enhancements suggested from our large user community, Shepherd's Staff 2010 will be released in October 2009. All customers with an active support contract as of 9/30/2009 will receive the upgrade at no cost. Customers who are using a previous version of Shepherd's Staff and would like to take advantage of the all the new powerful, time-saving features can upgrade at a substantial discount from the regular purchase price. For more information on upgrading call us at 800-325-2399 or e-mail [softwaresales@cts.cph.org](mailto:softwaresales@cts.cph.org).

Below is the list of features that will be in the upcoming release.

### **FEATURES / ENHANCEMENTS**

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#### **Attendance -- Att. Comparison report -- New Feature/Enhancement (Job 2322)**

Description:

When you select to print for all events on the Attendance Comparison report, it prints the names of all of the events in the report heading, on every page, which takes up alot of space. If you select all events, then just print "(All Events)" in the report heading, instead.

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#### **Attendance -- New report -- New Feature/Enhancement (Job 2314)**

Description:

Create a new report that prints a person's name, and then the number of events they have attended for multiple years to the right of their name.

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#### **Attendance -- Batch Posting -- New Feature/Enhancement (Job 2389)**

Description:

When posting an attendance batch, add a test that looks for already-posted attendance for people in the batch for the specified batch date AND the event, and if found, warn the user. This should help prevent people from double-posting batches (e.g. one person posts a batch on Sunday and someone else enters and posts the same information on Monday). It won't stop the double-entry of the batch, but it should stop the actual applying of duplicate data to attendees. We have implements the same capability in Contribution batches.

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#### **Attendance -- Attendance Summaries grid -- New Feature/Enhancement (Job 2315)**

Description:

If you try to search for a year range on the Attendance Summaries grid, and you have the "Current year only" checkbox marked, it is not readily apparent what the problem is. Add a warning message that tells the user to first uncheck the "Current year only" box before trying to search for a year range. The message should only appear if a year range has been entered on the Find window.

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**Attendance -- Batch Import/Export -- New Feature/Enhancement (Job 2382)**

Description:

So that the functionality is more obvious to the user, put a button on the Batches grid for Batch Import / Export. Also, when the import/export window closes, refresh the Batches grid to show the newly imported batch(es). Batches can be entered from a remote location then imported in the main database, making it easier for volunteers to work from home.

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**Attendance -- Att. Summary Find window -- New Feature/Enhancement (Job 2317)**

Description:

Add the following criteria to the Attendance Summaries grid "Find" window:

1. Ability to filter for just Members or Non-Members.
2. Ability to filter for just men or women.

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**Attendance -- Attendance Summaries grid -- New Feature/Enhancement (Job 2319)**

Description:

On the Attendance Summaries grid, flag Removed people with the standard blue row back color. This will make it easier to determine who should be included or excluded from a batch.

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**Attendance -- Att. Comparison report -- New Feature/Enhancement (Job 2321)**

Description:

On the "Across the page" version of the Quarterly comparison report, add a total to the far right that sums up the quarters and gives a year total.

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**Attendance -- Att. Comparison report -- New Feature/Enhancement (Job 2324)**

Description:

Add a Yearly format to the Attendance Comparison report, which will take the place of the Attendance History report.

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**Attendance -- Att. Comparison report. -- New Feature/Enhancement (Job 2325)**

Description:

Currently the "Report Type" has "Standard", "Visitors", and "Non-visitors". Update the wording as follows:

1. Change "Standard" to "All Attendees", since that is what "Standard" actually means now.
2. Change "Report Type" to "Print for", and that is actually what the selection does -- it determines who prints on the report; it does not -- technically -- determine a "type" of a report.

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**Attendance -- Attendance Records grid -- New Feature/Enhancement (Job 2320)**

Description:

On the Attendance Records grid, flag Removed people with the standard blue row back color. This will make easier to identify those people who are no longer active members of the congregations.

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**Contributions -- Vanco Import -- SP2 -- New Feature/Enhancement (Job 2297)**

Description:

Create an import utility for Vanco files. Vanco allows churches to scan offering checks and automatically create a deposit on the church bank account. This information is also used to automatically create a batch in Shepherd's Staff, which will save a tremendous amount of time.

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**Contributions -- Pledges grid -- New Feature/Enhancement (Job 2499)**

Description:

Add a button to the Pledge Records grid that takes you to the Contributor Details for the contributor for the selected pledge. This allows you to quickly get additional information about the contributor and past history.

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**Contributions -- Recreate Batch Report -- New Feature/Enhancement (Job 2486)**

Description:

When recreating a batch report, show the total of the batch to help in locating a batch by comparing the total offerings with a deposit total on a bank statement. This should appear as the furthest column on the right.

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**Contributions -- Batch Posting -- SP2 -- New Feature/Enhancement (Job 2387)**

Description:

When posting an offering batch, add a test that looks for already-posted offerings for people in the batch for the specified batch date, and if found, warn the user. This should help prevent people from double-posting batches (e.g. one person posts a batch on Sunday and someone else enters and posts the same information on Monday). It won't stop the double-entry of the batch, but it should stop the actual applying of duplicate data to contributors. We have implemented the same capability in Attendance batches.

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**Contributions -- Yearly Summaries grid -- New Feature/Enhancement (Job 2500)**

Description:

Add a button to the Yearly Summary Records grid that takes you to the Contributor Details for the contributor for the selected summary. This allows you to quickly get additional information about the contributor and past history.

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**Contributions -- Pledges grid -- New Feature/Enhancement (Job 2497)**

Description:

To the far right of the Pledges grid, add two columns, one for the percent of the pledge given based on Pledge-to-date, and another for the percent given based on the Total Pledge. This will help you more easily identify those members who are ahead or behind on their giving plan.

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**Contributions -- Fund Totals report -- SP2 -- New Feature/Enhancement (Job 2335)**

Description:

On the report that prints from the Fund Totals grid, add a column that shows the "un-pledged" total (i.e., the difference between the total amount and the pledged amount). This will you more easily determine how much of the amount given was "planned" versus how much came in outside of money pledged.

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**Contributions -- Batch Import/Export -- SP2 -- New Feature/Enhancement (Job 2381)**

Description:

So that the functionality is more obvious to the user, put a button on the Batches grid for Batch Import / Export. Also, when the import/export window closes, refresh the Batches grid to show the newly imported batch(es). Batches can be entered from a remote location then imported in the main database, making it easier for volunteers to work from home.

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**Contributions -- Statements (previewable) -- SP2 -- New Feature/Enhancement (Job 2370)**

Description:

On the "Statements (previewable)" reports change the blue bar to a gray bar. Customers are requesting that they not use up so much blue ink when printing statements. This will allow you to print only in black, which is less expensive than color cartridges.

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**Contributions -- Recreate Batch Report -- New Feature/Enhancement (Job 2487)**

Description:

Instead of showing the batches since the beginning of the current Contributions year, use the module date (lower right) instead, subtract 12 months from it, and then show all batches after that date.

The problem this solves is when, in January, after you've closed the Contributions year, you cannot get back to December if you need to reprint a batch report from just a few weeks prior.

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**Contributions -- Gifts-in-kind grid -- New Feature/Enhancement (Job 2501)**

Description:

Add a button to the Gifts-in-Kind grid that takes you to the Contributor Details for the contributor for the selected summary. This makes it easier to get information about the contributor, including past history.

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**Contributions -- Recurrent Offerings -- New Feature/Enhancement (Job 2481)**

Description:

Added a Copy button to the Recurrent Offerings grid. This will make it quicker to establish EFT or electronic offerings, since many contributors have similar patterns.

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**Contributions -- Statements (previewable) -- New Feature/Enhancement (Job 2342)**

Description:

Add a user-defined term for "Pledge" to the previewable contributions Statements. We're getting enough requests for different terms, and variations/shadings of those same terms (such as "Plan" vs. "Giving Plan", vs. "Plan for Giving" versus "Faith Plan", etc., etc.), that there is no way to add every variation in the application with making it overwhelming for users. Therefore, add a new "user-defined term" at the end of the list of pledge terms, that lets each customer specify up their own term for "Pledge", up to 20 characters should they wish.

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**Contributions -- Offerings grid -- New Feature/Enhancement (Job 2498)**

Description:

Add a button to the Offering Records grid that takes you to the Contributor Details for the contributor for the selected offering.

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**Contributions -- Funds grid -- New Feature/Enhancement (Job 2483)**

Description:

On the Funds grid, add columns that show the total offerings for the current calendar year-to-date (i.e. as of the PC date), and the past 2 calendar years. This makes is easy to compare giving of time.

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**Contributions -- Fund Totals grid -- New Feature/Enhancement (Job 2408)**

Description:

On the Fund Totals grid, the report has a column for the un-pledged amount. Add an "un-pledged amount" column to the grid itself. This will make it simpler to identify the amount given outside of that pledged.

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**Contributions -- Contrib. Nonparticipation -- New Feature/Enhancement (Job 2449)**

Description:

Add "Last Date Attended" to the "did not give" report. This will help you determine if someone is inactive or has stopped giving for some reason.

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**Contributions -- Statements -- SP3B -- New Feature/Enhancement (Job 2468)**

Description:

Add a way to shift the text of a statement up or down, and left or right, so that you can best fit the contributor address in #9 or #10 window envelopes. Since there are always slight variations in printers this will allow to get the best alignment for your printer.

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**Contributions -- Contributor grid -- New Feature/Enhancement (Job 2514)**

Description:

When working in the Contributor grid to enter Next Year envelopes, if a conflict exists, the name of the conflicting contributor is displayed so you can more easily find the conflict.

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**Contributions -- Contributor Nonparticipation report. -- New Feature/Enhancement (Job 2523)**

Description:

Added a new report type to the Contributor Nonparticipation report for those who pledged last year during the date range but did NOT pledge during the date range. This makes it simple to identify people who had a pledge previously but do not have one currently.

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**Contributions -- Reports -- New Feature/Enhancement (Job 2502)**

Description:

You can now print labels that include the contributor number from the previewable mailing label report.

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**Contributions -- Statements (previewable) -- New Feature/Enhancement (Job 2516)**

Description:

Contribution statements will now print for those who did not give any offerings during the time period you select.

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**Finance -- Check Printing -- New Feature/Enhancement (Job 2461)**

Description:

Redesign the Check Printing feature, adding the following capabilities:

1. Ability to preview checks in a regular Print Preview window.
2. Ability to print a single check at a time.
3. Ability to choose to keep some checks that printed while reprinting others.

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**Finance -- Intuit web payroll -- New Feature/Enhancement (Job 2511)**

Description:

Based on numerous requests from customers, we have modified the Payroll Import to support Intuit's web payroll application.

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**Finance -- Balance Sheet -- SP2 -- New Feature/Enhancement (Job 2361)**

Description:

The "Current year" and "Prior year" versions of the Balance Sheet, when printed for the Account level of detail, and with the "Consolidated" box UN-checked, currently print in landscape. In the process of updating the font to Arial (which frees up space horizontally), change the reports to portrait. This will allow you to get the same amount of information using less paper.

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**Finance -- Check/Deposit Reg. repts. -- SP2 -- New Feature/Enhancement (Job 2356)**

Description:

Modify the landscape version of the Check/Deposit Register report (which prints when you choose to "Hide line items". This will save space (allowing more lines per page), and the new font -- Arial -- is narrower and means that landscape isn't necessary.

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**Finance -- Check Register grid rept. -- SP2 -- New Feature/Enhancement (Job 2357)**

Description:

Update the report that prints the Check Register grid so that it takes less paper. This is accomplished by: (1) changing the font to Arial (which is narrower), which allows us to put the columns closer together, and (2) changing the report to portrait, which allows more lines per page.

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**Finance -- Budget Projection report -- SP2 -- New Feature/Enhancement (Job 2359)**

Description:

The Budget Projection report currently prints one account per page. Change this so that it prints 3 accounts per page, to save paper.

Also, in the process, update the font to Arial, adjust the page margins, change the default Preview to full zoom, move the page number to the bottom of the page, and make other adjustments as is being done to all reports files for 7.6 SP2.

Also, add a line to the right of each entry to provide some place to write in budgets. You'll have to write small (else we'd have to double-space the report and defeat the goal of this job, which is to reduce the number of pages the report uses).

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**\* Finance -- Check Register grid -- New Feature/Enhancement (Job 2471)**

Description:

Many grids have a little-known SHIFT-Right Click pop-up menu that gives quick access to associated reports.

However, on the Check Register grid, the pop-up menu has two special options that let the user tailor how the grid displays checks. It would be useful to have those more visible, so add an "Options" button that gives access to the pop-up menu.

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**Finance -- Chart of Accounts -- SP2 -- New Feature/Enhancement (Job 2355)**

Description:

Update the Standard Chart of Accounts for better readability. This includes widening the margins, reducing clutter, using separator lines and boxes, and other techniques. Also, change the font to Arial. Also, change the default Preview mode to full zoom. This will make the preview more readable and use less paper when printing.

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**Finance -- JE Register grid -- New Feature/Enhancement (Job 2475)**

Description:

On the Journal Entry Register grid, add a button that displays the "Edit Vendor" window for the vendor of the selected journal (if any -- attaching a Vendor to a JE is optional).

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**Finance -- Bank Bal. Less Dedicated -- SP2 -- New Feature/Enhancement (Job 2354)**

Description:

On the Bank Balance Less Dedicated report, the last column on the right is the Responsibility Code. Code "00" means that no code has been assigned, so don't print it (it's just confusing, because there actually is no code "00" that you can access on the Account add/edit window).

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**Finance -- Balance Sheet -- SP2 -- New Feature/Enhancement (Job 2367)**

Description:

When printing "Name only" on the Balance Sheet, and printing by Account level of detail, NON-consolidated, it still sorts by account number, which looks odd, and makes it difficult to locate accounts. Change this to sort by account name.

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**Finance -- Vendor grid report -- SP2 -- New Feature/Enhancement (Job 2366)**

Description:

Add the vendor e-mail address to the grid report. More people are using e-mail to keep in touch with vendors so this will make the address more visible.

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**Finance -- Transaction line items -- New Feature/Enhancement (Job 2458)**

Description:

For Line Items on a check, deposit or JE, increase the allowable characters from 35 to 50. This has been requested by many users so they can accommodate better descriptions.

(Note that this change will affect Recurrent Transactions, as well, since they must be able to accept as many characters as Transactions do for line descriptions.)

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**Finance -- Ded. Accounts report -- SP2 -- New Feature/Enhancement (Job 2364)**

Description:

Update the Dedicated Accounts report so that it prints in portrait, instead of landscape. This will allow you to get the same information while using less paper.

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**Finance -- Check line items -- New Feature/Enhancement (Job 2459)**

Description:

Increase the Invoice field in check line items from 10 characters to 40 characters. This will accommodate invoices that have longer numbers.

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**Finance -- Check Preview report -- New Feature/Enhancement (Job 2460)**

Description:

Include the Invoice number on the Check Preview report. This will accommodate easier matching of payments and invoices.

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**Finance -- Budget Projection report -- SP2 -- New Feature/Enhancement (Job 2360)**

Description:

Currently, if there is not enough data to project for a particular account, such as new accounts, then nothing prints for that account except a single row with zeros. Add a checkbox called "Include accounts that do not

have enough data for a Projection" (or some such name). Checking this box will include those accounts that cannot be projected: unchecking this box will prevent them from printing on the report.

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**Finance -- Balance Sheet -- SP2 -- New Feature/Enhancement (Job 2369)**

Description:

On the Consolidated version of the Balance Sheet, when printing for Account level of detail, the column headings only appear on the first page. Make them appear on all pages (as is done on the non-Consolidated version). For longer reports, this will make it easier to identify what each column is reporting.

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**Finance -- Checks grid -- New Feature/Enhancement (Job 2396)**

Description:

On the Check Register grid, add a button that displays the "Edit Vendor" window for the vendor of the selected check. This will save you time when working with checks and vendors.

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**Finance -- Checks grid -- New Feature/Enhancement (Job 2395)**

Description:

Add a new version of the Check Register grid report that groups by Vendor.

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**Finance -- Vendor add/edit -- New Feature/Enhancement (Job 2455)**

Description:

On the Vendor edit window, add a Print button to the Checks and Purchase Order grids, so that the grids can be printed. This will make for a handy report when reconciling payments.

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**Finance -- Checks grid -- New Feature/Enhancement (Job 2448)**

Description:

Due to the large number of checks written by the average church each year (when compared to deposits or journals), add a checkbox on the Check Register grid titled "Last 12 months only".

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**Finance -- Check/Deposit Reg. report -- New Feature/Enhancement (Job 2456)**

Description:

On the Check/Deposit Register report, add a version of the report that groups and subtotals the checks or deposits by month and year.

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**Finance -- Reports -- New Feature/Enhancement (Job 2472)**

Description:

On reports that let you specify the Account Number using the Account Selection window, on the Account Selection window itself, if you choose Pick and Choose, add the name of the Account Type to the list. Currently it just displays 1, 2, 3, etc. Adding clarifying text to that it shows in the list as "1 Asset", "2 Liability", "3 Equity", etc. This will make it MUCH easier to pick the account types you want.

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**Finance -- JE Register report -- New Feature/Enhancement (Job 2457)**

Description:

Add a new version of the Journal Entry Register report that groups by month/year, and provides a month/year subtotal. Line items should be hidden in this new report, for conciseness.

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**Finance -- Accounts grid -- New Feature/Enhancement (Job 2403)**

Description:

Currently on the Accounts grid there is no way to identify if an asset account is a Bank Account except by editing/viewing the account record. Therefore, add a column for "Bank Account?", to the right side of the grid.

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**Finance -- Ledger window report -- SP2 -- New Feature/Enhancement (Job 2353)**

Description:

On the report that prints from the Ledger window (accessed from the Accounts grid using the Ledger button), add a total for Debits, a total for Credits, and then the difference of Debits less Credits.

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**Main Menu -- Membership Settings -- New Feature/Enhancement (Job 2308)**

Description:

To support the changes in Jobs 2306 and 2307, update the terminology of the other two checkboxes in the "Default Values" section of the Membership folder, under the Main Menu Settings, to give it a similar format:

1. Change "Phone numbers are Unlisted" to "New phone numbers are Unlisted".
2. Change "Default new Person Records to 'Non-Member'" to "New Person Records default to 'Non-Member'".

These options will speed up entry of new records by setting the default standard for your church.

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**Main Menu -- Restore Finance -- New Feature/Enhancement (Job 2327)**

Description:

To help customers to keep from picking the wrong "restore" option, make the following changes:

1. Rename "Restore Finance" to "Restore Finance Only".
2. Put a separating line between "Restore Finance Only" and "Restore".

Some users were not clear that you can restore Finance independently of all of the other modules. This should help make it clearer.

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**Main Menu -- Settings -- New Feature/Enhancement (Job 2311)**

Description:

When you select or unselect "Do not use Nicknames" on the Contributions folder of the Main Menu Settings, it does not automatically update all contributor names, but only affects those contributors edited after the box is changed. You have to run "Rebuild Contributor Names" under the Contributions Utilities menu. To assist the user, add a pop-up message that explains this requirement.

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**Main Menu -- User Security details -- New Feature/Enhancement (Job 2305)**

Description:

Re-word the various Details options for User access for each module, making the terms clearer, and consistent in phraseology. This will simplify the options when adding new user security.

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**Main Menu -- Audit Log report -- SP2 -- New Feature/Enhancement (Job 2345)**

Description:

Updated the Audit Log to use Arial, and to take less paper. Before: 361 pages. After: 241 pages. Savings: 120 pages, or 33% reduction.

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**Membership -- HH Record report -- New Feature/Enhancement (Job 2485)**

Description:

Certain data on the blank Household Record report (the "survey"), is information that the church office would probably decide upon. Therefore, move that information to the bottom of the report, and place it inside a box with the title, "Office Use Only".

The fields that should be in this box are:

- 1. Salutation
- 2. Name on Labels
- 3. Type
- 4. Person Assigned
- 5. Ministry Group

This should make it less confusing for new members who are filling out the form.

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**Membership -- Church Register--Confirm. -- New Feature/Enhancement (Job 2414)**

Description:

Add a pop-up window, as on the Church Register for Baptisms, that displays the locations entered elsewhere, on other Confirmation register records.

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**Membership -- Parents Of report -- New Feature/Enhancement (Job 2478)**

Description:

Right now the Parents Of report prints the child's nickname (if any) on mailing labels. Add an option that allows the customer to print the child's first (given) name, instead, if so desired. This will provide a more professional presentation, especially when sending mail for school purposes and more formal occasions.

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**Membership -- Activities grid report -- SP2 -- New Feature/Enhancement (Job 2328)**

Description:

On the Activities grid report, add the "Office" under the Activity name, but only if an Office exists (i.e., don't just print "Office:" with no office after it).

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**Membership -- A/S/T windows/security -- New Feature/Enhancement (Job 2304)**

Description:

Add a security option so that a Membership User can be given rights to just Activity/Skill/Training List maintenance.

This means:

1. If you check just that box, the user can add/edit/delete Activitiy/Skill/Training lists.
2. The user can also use the A/S/T Mass Update, List Manager, and Multi-Add utilities.

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**Membership -- Dashboard -- SP3 -- New Feature/Enhancement (Job 2446)**

Description:

Create a new Church Dashboard feature, for release immediately as part of a SP. The first release will be limited; we can expand it in the 7.7 as we get feedback. For now, only display it as part of Membership. As we get more suggestions from users, we will expand the information presented from other modules. This is a quick way to get key data about your church at a glance.

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**Membership -- People grid -- SP1 -- New Feature/Enhancement (Job 2295)**

Description:

Expand the "Show Removed persons" checkbox on the People grid by changing it to a choice list, with additional options:

1. "Show Removed persons" -- Works like the current checkbox and includes removed people in the grid (in combination, of course, with any Find criteria).
2. "Show only Removed persons" -- Only shows removed persons in the grid, in combination with any Find criteria.
3. "Show only Members" -- Only shows Members in the grid, in combination with any Find criteria. (For example, if you choose to see Non-members under the Find feature, and then choose this option, you'd get NO PEOPLE in the grid because there are not any "member non-members" -- they are mutually exclusive search values.)
4. "Show only non-Members" -- Only shows non-Members in the grid, in combination with any Find criteria. (Again, you can cause NO PEOPLE to appear if you pick Members on the Find window in conjunction with this filter. That would be asking for mutually exclusive search values.)

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**Membership -- Church Directory -- New Feature/Enhancement (Job 2443)**

Description:

In version 7.5 (Job #1824) we made the existing Work phone "Unlisted" field available to the user, so that Work phones can now be flagged as unlisted. For the 7.7 release, modify the Church Directory so that it takes into account this field, and does not print Unlisted Work phone numbers if the user chose to exclude them, OR flag the phone number with an asterisk if the user chooses to include unlisted Work phone numbers.

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**Membership -- Church Directory -- New Feature/Enhancement (Job 2442)**

Description:

Add the ability to printer either Work phone or Cell phone on the "E-mail by Person" report (which currently only prints the home phone).

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**Membership -- Church Directory -- New Feature/Enhancement (Job 2441)**

Description:

Add the ability to printer either Work phone or Cell phone on the "E-mail by Household" report (which currently only prints the home phone).

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**Membership -- MP Manager -- New Feature/Enhancement (Job 2435)**

Description:

Add Cell Phone to the Qualified Persons grid.

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**Membership -- Labels (advanced) -- SP2 -- New Feature/Enhancement (Job 2303)**

Description:

Currently the Zipcode Report on the "Labels (advanced)" window, "Print Options" folder, only prints for 3-digit zip prefixes. A number of customers have requested the ability to print for 4-digit prefixes.

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**Membership -- Church Directory -- New Feature/Enhancement (Job 2439)**

Description:

On the "Household -- 1-line per household" report, under the household phone number, allow the user to print the Work or Cell phone for the Head of Household OR the Spouse.

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**Membership -- Add Household -- New Feature/Enhancement (Job 2306)**

Description:

In 7.6, when you add a new Household Record, the Newsletter checkbox on the Mail/E-mail folder defaults to checked. Add a default setting on the Membership folder off the Main Menu "Settings" that lets the customer choose to change the default for the Newsletter to UN-checked.

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**Membership -- Add Person -- New Feature/Enhancement (Job 2307)**

Description:

In 7.6, when you add a new Person Record, the "Include this person in MemberConnect" checkbox on the E-mail folder defaults to checked. Add a default setting on the Membership folder off the Main Menu "Settings" that lets the customer choose to change the default for this checkbox to UN-checked.

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**Membership -- Church Register -- New Feature/Enhancement (Job 2309)**

Description:

On the Church Register grids, only the Officers grid shows the register number. The other grids require you to view the record in order to see the register number. So, add the register number to all the other grids, to the far right. For the Weddings grid, add both the husband's and wife's register numbers. (Of course, the Historical Events grid doesn't have a register number, and so won't be modified.)

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**Membership -- HH and Person Records -- New Feature/Enhancement (Job 2310)**

Description:

Allow e-mail address (Household, Personal, Work) to be flagged as "unlisted", so that they can be excluded from printing on certain reports

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**Membership -- Church Directory -- New Feature/Enhancement (Job 2440)**

Description:

On the Church Directory there are space limitations in the report layout/design that prevent us from printing every phone number. (This is why we developed a brand new report -- the Church Phone Book -- with a report layout/design that supports printing all phone numbers.) However, we can add an option to allow the user to print Cell phone INSTEAD of Work phone.

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**Membership -- MemberCaller Interface -- SP3D -- New Feature/Enhancement (Job 2496)**

Description:

MemberCaller is a new functionality that allows you to record a voice message and have it instantly set to all of you members. This is much more efficient than the traditional phone tree. By integrating with Shepherd's Staff you can call every member, or any subgroup of members you wish. To get more information about MemberCaller visit our web site at <http://cts.cph.org/tellblast/>

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**Membership -- Mailing Labels -- New Feature/Enhancement (Job 2383)**

Description:

Add the ability to repeat a label "n" number of times, sequentially, like this:

John Smith 1234 Main St. Anywhere, MO 63123	John Smith 1234 Main St. Anywhere, MO 63123
Zack Smith 1222 Elm St. Anywhere, MO 63123	Zack Smith 1222 Elm St. Anywhere, MO 63123

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**Membership -- Blank Person Record -- New Feature/Enhancement (Job 2371)**

Description:

The Family Relationship field appears to be associated with the Spouse Name, due to its proximity to the Spouse Name. Move Family Relationship up to the right of Household Name, so that there is no confusion that we are talking about the Family Relationship of this person to the household, not the family relationship of the Spouse.

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**Membership -- Promote Students -- New Feature/Enhancement (Job 2373)**

Description:

When running the Promote Students utility, allow the user to clear Sunday School Sections if they so desire, since often the section changes when the grade changes. This will save time from editing records when the section is not the same year to year.

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**Membership -- Promote Students -- New Feature/Enhancement (Job 2375)**

Description:

When running the Promote Students utility, add the number of students promoted (both grade and Sunday School grade) to the Audit Log.

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**Membership -- Person Record -- New Feature/Enhancement (Job 2407)**

Description:

Where it makes sense, provide an Age pop-up for date fields on the Person Record. The pop-up should show the difference in years between the person's birth date and the date in the field. For example, you could see the person's age when they passed away.

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**Membership -- Grade Mass Update -- New Feature/Enhancement (Job 2377)**

Description:

When running the Grade Mass Update utility for Sunday School grades, allow the user to clear Sunday School Sections if they so desire, since often the section changes when the grade changes. This will save time from manually changing the section after the promotion, since the section usually varies from year to year.

\*\*\*\*\*

**Membership -- Grade Mass Update -- New Feature/Enhancement (Job 2378)**

Description:

When doing the Grade Mass Update:

1. Add to the completion message a count of the number of people changed.
2. Show a "no changes made" message if no data was changed (i.e., if no one matched the search criterion). (In 7.6 and earlier the message was ambiguous -- and misleading -- because it didn't indicate if no people were found in the specified grade.)
3. Update the Audit Log to display the number of changes made.

\*\*\*\*\*

**Membership -- Person Record -- New Feature/Enhancement (Job 2453)**

Description:

If you mark an existing person in Membership as Removed, check to see if that person has unreturned loans, or assigned church keys, in the Scheduler module, and if so, display a warning box that lists the inventory and keys. However, don't prevent the removal -- clicking OK on the message should continue with the Save process. This way if someone leaves the church you will know if they are in possession of church property.

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**Membership -- Report Writer -- New Feature/Enhancement (Job 2380)**

Description:

Added a new field to the list of Report Writer "membership" fields: "Household Record Last Update."

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**Membership -- Address folder -- New Feature/Enhancement (Job 2372)**

Description:

On the Address folder of the Person and Household records, add a "copy address" button that works like the Clipboard button on the Address/Phone folder of the Households and People grids. This will make it easier to share data between different programs.

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**Membership -- Visitation Schedule rept. -- New Feature/Enhancement (Job 2384)**

Description:

When printing the Visitation Schedule report, show the notes for the Last Visit. This will save time and keep staff who make visits better informed on important member information.

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**Membership -- Inactivity Report -- New Feature/Enhancement (Job 2401)**

Description:

Add a "Labels" button so that you can print 2-wide or 3-wide labels without having to first create a Static subgroup. This time saving feature will make it easier to contact those members who have not attended or have not given.

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**\* Membership -- MemberConnect Export -- SP3D -- New Feature/Enhancement (Job 2482)**

Description:

Currently a person must be the SYSADMIN, specifically with "SYSADMIN" as the log in, in order to be able to export data to MemberConnect. Change this to allow anyone with Supervisor access to Membership to export the data (which by definition will include System Administrators). This will allow more people to assist in managing communication via MemberConnect.

\*\*\*\*\*

**Membership -- Person Record -- Grade -- New Feature/Enhancement (Job 2400)**

Description:

Add "College" to the list of Grades on the School folder of the Person Record. This should NOT be a promotable field -- i.e., you do NOT promote from 12th grade to College. This will make it easy to identify students who are presently in college so you can minister to them and their special needs.

\*\*\*\*\*

**Membership -- Visits and Sched. Visits -- New Feature/Enhancement (Job 2399)**

Description:

On both the Visits and Scheduled Visits grid, save the "Show" and "Sort by" options when the window closes, and use those next time. (These should save by User ID, so that each user can have their own settings.)

Note: At this time the filters -- the Visit Type and Visited By -- do not save because doing so would most likely confuse users when the grid doesn't initially show all visits (but instead a filtered subset from the LAST time that user opened the grid). By contrast, "Show" and "Sort by" are not filters but display options.

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**Membership -- SS Class List -- New Feature/Enhancement (Job 2479)**

Description:

Add the ability on the Sunday School / Church Class List report to print blank lines under each grouping, so that you have room to write-in visitor information.

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**Membership -- Mail Merge -- New Feature/Enhancement (Job 2379)**

Description:

Added a new field to the list of Mail Merge fields for Households: "Household Record Last Update"

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**Membership -- Person/Envelope -- New Feature/Enhancement (Job 2484)**

Description:

If you remove a person who has an envelope, and that person is the ONLY person on the envelope, then automatically set the "Skip Renumber" flag in the Contributor record, in Contributions. This will save you time and effort of having to go to Contributions to make that change.

\*\*\*\*\*

**Membership -- Subgroups report -- SP2 -- New Feature/Enhancement (Job 2347)**

Description:

On the Subgroups report in Membership:

1. On the "Subgroup name and description" version, add a column for "Last Used" date.
2. On the "Subgroup name and Security Rights" version, add a column for "Last Used" and also for who used it.

This will make it easier to see if a subgroup is in use or should be deleted and who has rights to use the group.

\*\*\*\*\*

**Membership -- Dropdown Lists report -- New Feature/Enhancement (Job 2351)**

Description:

Update the Dropdown Lists report as follows:

1. Add the print time under the print date, in the upper left.
2. Change the font to Arial, move the page number to the lower right, and put the church name above the report title.
3. Default the report Preview to full-zoom.

This should make the report more readable.

\*\*\*\*\*

**Membership -- Household by Map Block report -- New Feature/Enhancement (Job 2346)**

Description:

Two issues/improvements:

1. The name of the subgroup did not appear in the report heading if you printed for a subgroup. Now it does.
2. The Map Block Filter did not appear in the report heading, and it probably should since that determines which households (within the subgroup, etc.) are included. So now it appears just above the Subgroup name.

This will make it easier to readily identify the information with which you are working.

\*\*\*\*\*

**Membership -- Household Record report -- Blank -- SP2 -- New Feature/Enhancement (Job 2349)**

Description:

Make the following changes to the Blank version of the Household Record report:

1. Update the font to Arial, and make the report more professional looking.
2. Change the title from "Household Record" to "Household Survey".
3. Add more space for writing (double the space for each line).
4. Add "Newsletter?", to support the Newsletter checkbox we added last version.
5. Update the person information columns to the following:

Name

Sex

Birth date (new column -- provides critical age information)

Baptism (can represent the date or Y/N -- that is the customer's option)

Relationship (can be the family relationship, or Head/Spouse/Child -- that is the customer's option)

Cell phone (new column -- most folks have a cell phone now-a-days)

Work phone

Remove the Membership and Participation columns, since the chances are that this person is NOT a member, but a visitor or prospect.

\*\*\*\*\*

**Scheduler -- Inventory report -- SP2 -- New Feature/Enhancement (Job 2350)**

Description:

When you include "Rooms and quantity" on the Inventory Valuation report, it would be helpful if there was a subtotal for the total quantity in all rooms, and the total current value in all rooms, so that you can easily see if there is a discrepancy between that and the total inventory count.

For example, if you have 200 hymnals, and the room detail shows only 175 in all rooms, then you might want to track down where the other 25 hymnals are being stored/kept.

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**Scheduler -- Conflicts window -- New Feature/Enhancement (Job 2388)**

Description:

On the conflicts window that appears if you schedule an event for the same room for the same time, or two people for different events at the same time, or if you try to use inventory in two locations at the same time, add a "copy to Windows clipboard" button so that you can save off that information for reference or use in another application.

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**Scheduler -- Inventory grid report -- SP2 -- New Feature/Enhancement (Job 2344)**

Description:

To conserve space and use less paper, change the report that prints from the Scheduler Inventory grid into a 2-column report.

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**Scheduler -- Church Keys feature -- New Feature/Enhancement (Job 2450)**

Description:

Add the ability to track Church Keys (i.e., door keys, vehicle keys, etc.). Keys are not like other inventory items since they are tied to people rather than a room.

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**Subgroups -- Count window -- New Feature/Enhancement (Job 2447)**

Description:

When you click the Count button for a subgroup on the Subgroups grid, add to the message a count of the number of households represented by the people in the selected subgroup. Subgroups track people but by counting households, you can indentify how many pieces of mail would be generated should you choose to send to a household rather than each person.