

# Concordia Technology Solutions Support Documentation

## Shepherd's Staff 7.7 Service Pack 1A



### **Finance -- New Payroll Import -- SP1 -- New Feature/Enhancement (Job 2538)**

Description: Intuit has replaced Intuit Online payroll with a new version of Intuit Online payroll that will not export the excel file we need to import payroll. CTS has picked the following payroll package as a replacement to offer customers: Payroll Mate.

Solution: Add Payroll Mate to the options in the Payroll Import utility in Finance.

This import works the same as the other imports, but there are a few notable differences:

1. The path of the last-selected file now saves. (This applies to all of the import types.) This means you don't have to reselect the location every time. It saves as a form setting.
2. Line items (columns) with a zero amount are not imported.
3. Line items (columns) with the word "(Employer)" in the heading are not imported at this time. (Those are the church portion of taxes such as Medicare.) Customers will need to enter journal entries to transfer these liability totals into Shepherd's Staff from Payroll Mate.

In testing, visually match the check amounts with those in Payroll Mate, and also run Rebalance to make sure a "CORRECTING ENTRY" wasn't added to the lines.

### **Finance -- Previewable checks -- SP1 -- Bug Fix (Job 2537)**

Description: When using the new previewable checks, it sets the next check number on the screen, but does not do that in the database (when you've chosen to override the next check number).

Solution: Corrected several lines of code inside the software.

### **Finance -- Previewable checks -- SP1 -- New Feature/Enhancement (Job 2536)**

Description: When the previewable checks window appears, the check date is blank. Default it to the current module date.

Solution: Corrected several lines of code inside the software.

### **Membership -- Dashboard -- SP1 -- Bug Fix (Job 2535)**

Description: On the Dashboard in Membership, exclude Deleted persons from the Received/Removed counts. (Deleted persons have a sequence of 0.) (Note: They are already being excluded from the total membership/baptized counts.) Make this change to the Dashboard in Attendance and Contributions as well.

Solution: Corrected several lines of code inside the software.

### **Membership -- Dashboard -- SP1 -- Bug Fix (Job 2534)**

Description: The Worship attendance shows as zero on the Dashboard.

Solution: Line of code was missing that populates the data on-screen. (Data was being correctly pulled, just not displayed.)



## **Membership -- E-mail -- Select Group -- SP1 -- Bug Fix (Job 2533)**

Description: To duplicate --

1. Open the Send E-mail window and click the To button.
2. Select a Subgroup of people.
3. Check the "Private e-mail addresses" box.
4. You'll see alot of duplicate e-mails with "PRIVATE" next to them -- even though those addresses are not marked as private.

Solution: Corrected several lines of code inside the software.

## **Contributions -- Contributor List report -- SP1A -- Bug Fix (Job 2539)**

Description: On the 2-column version of the Contributor List report, the column headings for the This Year and Next Year envelope reports are flipped -- the This Year report shows "Next Year" with that year, and the Next Year report shows the current year. (However, the data in the columns is correct.) (Tracker #1315)

Solution: Corrected several lines of code inside the software.

## **Contributions -- Utilities -- SP1A -- Cosmetic Fix (Job 2540)**

Description: The utility that activates the Next Year numbers is labeled like this, under Utilities: "Start using 2010 Envelope numbers". However, if you close the Contributions year first, this reads the NEXT year, confusing customers. Example: If this is 01/31/2010, and you just ran Y.E., the menu reads "Start using 2011 Envelope numbers".

Change the text to read: "Start using Next Year's Envelope numbers"

Solution: This required:

1. Changing the utilities menu caption.
2. Changing the confirmation message box (that appears when you pick the utility) in three spots, plus the message box caption.
3. One spot in the message that appears if you try to run the utility while there is an unposted batch.
4. One spot in the confirmation message, plus the message box caption.
5. One spot in the Audit Log entry.

Solution: Corrected several lines of code inside the software.

## **Finance -- Reports -- SP1A -- Cosmetic Fix (Job 2541)**

Description: Fix the following problems:

1. When exporting a Finance report from the Print Preview, where the report has a date and time in the upper left corner, it was inserting the date and time after the report titles.

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2. On the four 12-month formats of the Statement of I&E (actual, actual less budget, budget, and budget vs. actual), for each of the three levels of detail (Account, Minor, and Major), when exporting to Excel it inserted a blank column between April and May.

Solution: Corrected several lines of code inside the software.

## **Finance -- Statement of I and E -- SP1A -- Bug Fix (Job 2543)**

Description: When exporting the Statement of I & E for "Current Month and YTD", for Account level of detail, into Excel (from the Print Preview window), it drops the total for the Actuals column. (Tracker #1312)

Solution: Blank field was causing the problem. Deleted the field in FI&E1.RPT. (Note: Heading of Year-to-date now reads just "Year-to-date", instead of "Year-to-date Actual & Budget", since we have subheadings that read "Budget" and "Actual".)

Solution: Corrected several lines of code inside the software.

## **Membership -- Church Dir. and Ph. Book -- SP1A -- Cosmetic Fix (Job 2544)**

Description: Export the Church Phone Book or Church Directory reports to Excel (and perhaps other formats) results in the date and time being exported to the right of the report headings.

Solution: Fix all RPT files for the Church Phone Book, and fixed the ones for the versions of the Church Directory that include the date/time in the upper left (not all versions do).

Solution: Corrected several lines of code inside the software.

## **Membership -- People grid -- SP1A -- Bug Fix (Job 2542)**

Description: The Last Edited column is blank in the People grid (to the far right). (Tracker #1317)

Solution: Removed "p." from in front of RevisionDateTime.