July 2013 Updates

Gift Process Enhancements

- ***Create Donor Responses:*** This new form allows you to create donor responses for a group.

- ***Pledge Start Date:***
    - For a donor's pledge, the Pledge Start Date field can now accept dates with four-digit years.
    - Previously when adjusting a contribution, the Pledge Start Date was automatically updated. Now, the Pledge Start Date only changes if you adjust the date itself.

- ***Gift and Pledge Processing:*** The GPP form will now display an "X" in the giving detail if the contribution has been reconciled with the pledge.

- ***Major Donor Summary:*** This form now displays an "X" if the donor plans a gift, even if they have not designated the payment.

- ***Updates to the Pledge Schedule Adjustment form:***
    - Calendar correctly enters the date, and the same date cannot be entered more than once.
    - You cannot schedule an amount of zero or less.
    - You can now modify the schedule even if payments have been sent, and if the schedule changes, the correct due amount properly recalculates.

- ***Membership Installment:*** The same changes that were made to the Pledge Schedule Adjustment form were also made to the Membership Installment form.

- ***Additional Donor Criteria:*** This form now allows you to specify Contribution Categories, Designation Asset Classes, and Designation Types when building your saved lists.

- ***Linking to other forms:*** You can link to Campaign Group Results by Prospect, as well as the Individual History form, from the Gift and Pledge Processing form.

- ***Amount past due for a pledge:*** The Pledge file has a new computed column that calculates the amount past due for the specified pledge. An amount is past due if a pledge schedule record is dated as due before today and has not been fully paid. If a schedule record is due but has only been partially paid, then only the part unpaid will be added to the past due amount.

- ***Storing balances:*** The LR Pledge Reminder AMT field stores the pledge or membership dues balance if the balance is less than the amount of the next scheduled payment.

- ***Commemoration Detail*:** This form now automatically fills the campaign and designation fields when you are adding a new donor to a campaign.

- ***Updates to the Match Expectancy form:***
    - This new form for a company now adds constituency records automatically.
    - The Match Expectancy will be correctly updated if, for instance, a pledge is voided.

- ***Philanthropy:*** Philanthropic activity can be pulled on a form for an individual/organization even if the activity has no date associated with it. It is also no longer necessary to search for philanthropic activity by date; a search for it will return all activity.

- ***Pledge Payment Entry:*** This form now defaults to the payment method that was specified by the donor on the pledge.

- ***Populate Designation Letters:*** This form now accepts a saved list of designations.

- ***Award Handling Comment:*** This form now provides you with a place to record and manage specific instructions from a donor for a designated gift.

- ***Updates to the Dues Entry form:***
  - When handling a gift membership, the Dues Entry form will now to default to the giver of the gift membership rather than the recipient.
  - Dues on this form that qualify for a premium can be successfully recorded.

- ***Actualized Gift Entry:*** This form now properly distributes credit when a donor has multiple designations for a gift.

- ***Person Profile and Major Donor Profile:***
  - The PPFR and the MDPR now properly display the vocations associated to major donors.
  - The PPFR and MDPR reports now distinguish between current and former employees using the current date. If the employment end date is either null or falls after the current date, the employee is current, and if it falls before it, it is former.

<u>Gift Process Errors that have been corrected</u>

- ***Commemoration Detail:*** This form incorrectly displayed the soft credit amount in every row; now it displays only in the correct row.

- ***Person Profile and Major Donor Profile:*** The Person Profile (PPFR) and the Major Donor Profile (MDPR) automatically displayed a phone number as the person's "Home" number if the number had no other label.

- ***Linking to other forms:*** An error was encountered when linking from the Wealth Screening Summary to the Quality of Match form.

- ***Contribution Match records:*** A previous update inadvertently created Contribution Match records that are now removed.

- ***Donor Giving Relations:*** Previously, the Donor Giving Relations form did not pull up the names of organizations that were included in giving groups. Now, it returns the giving group member names for both individuals and organizations.

Enhancements for Scholarship Processes

- ***Outstanding Scholarship Letters Report*:** This report allows you to identify which students need to complete acknowledgments.

- ***Scholarship Recipient Track Update:*** On this form, the Require Letters to Assign Track field allows you to indicate whether designation letters must exist for a track to be assigned.

- ***Scholarship Recipient Letters Report:*** This report now displays the Long Description of the scholarship recorded on the Designation Definition form.

Updates for other Forms and Reports

- ***BIO form:***
    - You can no longer enter citizenship for a country that is not in the country file (for instance, if country is misspelled).
    - The form allows multiple entries with the same last name in the Other LFM Name field.

- ***Individual History:*** This form now shows descriptions instead of only codes.

- ***Organization Profile form:*** Duplicate EIN numbers that were causing errors in 1099 processing are now prevented.

- ***Name and Address Entry form:*** It is no longer possible to enter a “zero” for gender designation.

- ***Recognition Program:*** This form allows you to feed two programs with different criteria into a single program for recognition membership continuity programs.

- ***Duplicate Employer Tax ID Report:*** The DETR allows you to see which organizations share tax ID's.

Other Important Updates

- ***The Build VSE Work Files (BVSE) process*** includes soft credit contribution information for the Board of Governors members. This allows you to complete the optional question about Board giving on the VSE Survey.

- ***General Ledger:*** To prevent errors in the General Ledger, the Contribution Adjustment and PPE forms were changed to return errors when new activity is taken on the pledge or one of its payments when there are previous transactions on the pledge or its payments that have not yet been posted to the General Ledger.

- ***Computed columns:*** There have been several performance enhancements to computed columns.

- ***In W-2 Form Print***, you can now sort by primary pay cycle.

General Form Errors Corrected

- ***Communication Management:*** General errors in the Communication Management forms are resolved.

- ***Spaces on forms:*** Forms allowed unnecessary spaces to be entered in various fields, leading to errors later on. These spaces are now automatically removed.

- ***The Person Relations form*** listed the surviving spouse as the late spouse when one member of the couple was deceased.

- ***On the Relationship form***, changing the status of a relationship that had more than one role would delete all the roles except for the one that you changed.

- ***Address Access:*** Users who were only supposed to have access to view addresses were able to delete address records.

Search Errors Corrected

- ***Person Lookup:*** When performing a Person Lookup, an error occurred because one of the fields the program was trying to pull had missing elements.

- ***Address Search:*** Searching for an address did not pull up the country field from the address, even if there was information in it.

- ***Mail Names:*** When an individual's mail name was needed, it was not pulled from the form where it was located.