



## General

- Added a "Bulk Email Wizard" to allow the user to quickly generate an email message to multiple Households, Individuals, and Contacts.
- Enhanced many of the report configurators to allow the user to save and name the report design's settings. The user can then later simply choose the name of their saved report design to recall the report configurator's settings.
- Added a flexible and powerful custom Filter Builder to allow the user to create and save user-defined filters. These filters can be used in Explorer views, report configurators, Group Membership assignments, and more.
- Enhanced the Navigation Menu bar (left-side menu bar) to provide quick access to all areas of the product.
- Significantly enhanced MS Word mail merge capability allowing users to choose from a list a saved Word mail merge files.
- Added ability to easily print the displayed information from any Explorer view.
- Added a Print button to the report configurators to send report directly to printer if desired. A Preview button is still available to preview the reports on-screen before printing if desired.
- Added a "Calendar Creator" which can easily produce and print graphical monthly calendar reports displaying special dates such as birthdays, wedding anniversaries, scheduled visitations, etc.
- Added regional formatting options for world-wide usage (ie. date formats, currency units, report page sizing, etc.).
- Enhanced the Explorer views to allow the user to pick and choose what data fields are to be displayed.
- Enhanced local preference settings which allow each workstation to be customized independently of other machines running the product.
- Added ability to many of the report configurators to specify the desired font, font size, and font color for the report.
- Added option to specify the folder path and filename of the current data file in the program's main titlebar.
- Enhanced database repair utility.
- Enhanced individual-based mailing labels to include optional user-specified header line (such as "To the Parents of:").
- Removed product name and copyright notices from the footer of all generated reports.
- Added full window-sizing and splitting capabilities to all Explorer screens.
- Improved installation package to generate more robust and reliable product installations.
- Improved backup/restore functionality including support for multi floppy disk spanning.

## Households, Individuals, & Contacts

- Added a "Flag Wizard" to facilitate bulk setting and clearing of Individuals, Households, and Contacts.
- For Households, Individuals, and Contacts; increased the number of user-definable fields to: 6 date fields, 6 text fields, and 6 pull-down lists.
- Expanded note tracking for Household, Individual, and Contact records by adding 3 note fields. Each of the 3 note fields has its own security settings and can be labeled by the user.
- Added 6 user-definable checkbox fields for Households, Individuals, and Contacts.
- Replaced the single salutation field for Household, Individual, and Contact records with a "Formal Label Name" and an "Informal Label Name". These label names can be automatically or manually generated. Also, created a "Formal Greeting" and "Informal Greeting" field for all Household, Individual, and Contact records which is designed to use for mail merges, form letters, and other communications where a greeting field is required.
- Added a "Private" option to all email and phone fields which can be used to hide these items from being included in reports.

## Contacts

- Added a "Pager" field for Contacts.
- Added a "Middle Name" field for Contact records.

## Groups & Group Membership

- Added the ability to allow the user to completely manage the "Category" (or top) hierarchy level of the Group module's structure.
- Enhanced Group Membership module to support a user-definable list of membership positions (ie. "Member", "Teacher", "Prospect", "Former Member", etc.).
- Enhanced Group Membership module by adding a Comments fields for each Group Membership record to store details about an individual's membership to a Group.

## Meetings & Attendance

- Added an automatic "Last Attendance" date field for Individual records to keep track of their last Meeting attendance.
- Added Filter capabilities to the Percentage Attendance Report Configurator.

## Contributions & Pledges

- Added "Work@Home" module to allow the remote entry of contribution records. These remotely entered contribution records can easily be merged into the main product's database.
- Added filtering options to the Contribution Statement Configurator to allow the user to generate only statements for: Contributors who have contributed over a user-specified amount or who are behind in their pledge(s).
- Enhanced contribution and pledge based reporting to eliminate the need to update contributor information prior to producing report - resulting in significantly faster report generation times.
- Added option to hide all "Quid Pro Quo" related fields on contribution forms, reports, and statements.
- Added a "Contributor Type" designator to Household, Individual, and Contact records to better identify contributors and non-contributors. The Contribution Batch Detail Form's "Contributor" pull-down list can be filtered to display only "Contributor Types" if desired.
- For contribution statements and receipts, added capability to produce Revenue Canada tax receipts which include: Signature line, organization's TaxID, and unique receipt#'s.
- Enhanced the pledge status reporting on Contribution Statements and Pledge Statements to include monthly pledge detail with variance by month, total pledge, and year-to-date.
- Implemented Batch "post" functionality to contribution batches.
- Added a "Default Pledge Year" preference setting.

## Visitations

- Expanded note tracking for Visitation records by adding 3 note fields. Each of the 3 note fields has its own security settings and can be labeled by the user.
- Added "Start Time" and "End Time" fields to Visitation records.

## Reminders

- Added a time field to Reminder records.

## Custom Report Generator

- Added secondary address fields to the listing of selectable fields for Household-based custom reports.