SeniorSystems

Alumni Development Release Bulletin

In this release bulletin, the latest enhancements to the **ALUMNI DEVELOPMENT** application are described.

New Options for Salutation Formatting

There are now several new database fields available for the enhancement of salutation formatting. These salutation formats provide more features to control the appearance of the title bar in **Constituent Maintenance**.

Go to the **Maintenance > Administration Maintenance >Address/Salutation** tab.

The sample names in this window have been changed. Previously, if a primary constituent was referred to as *Mr. Andrew Mark Smith (Smith)*, then the spouse would be referred to as *Mrs. Susan Ann Smith (Johnson)*.

Due to the difficulty of differentiating the **Spouse Last Name** from the **Constituent Last Name** and **Constituent Maiden Name**, several sample values have been changed and new values have been added.

Please consult the following table for this list:

Data Field	Old Sample	New Sample
Constituent Maiden Name	Smith	Jones
Spouse Last Name	Smith	Brown
Constituent First Name	Andrew	James
Constituent Preferred Name	Andy	Jim
Spouse Maiden Name	Johnson	Miller

These values expand the **Constituent Maintenance** title bar capabilities:

Data Field	Old Sample	New Sample
Cons 2nd Constituency Abbrev.	*None*	GP
Cons 3rd Constituency Abbrev.	*None*	TR
Constituent Anonymous	*None*	Anonymous
Constituent Lost/Deceased	*None*	Lost
Constituent Key Codes	*None*	Key Codes(Cons)
Spouse 2nd Constituency Abbrev.	*None*	FA
Spouse 3rd Constituency Abbrev.	*None*	CP
Spouse Lost/Deceased	*None*	Deceased
Spouse Key Codes	*None*	Key Codes(Spouse)

In previous versions, the display of the **Constituent Maintenance** title bar was controlled by the settings enabled in **Preferences** menu.
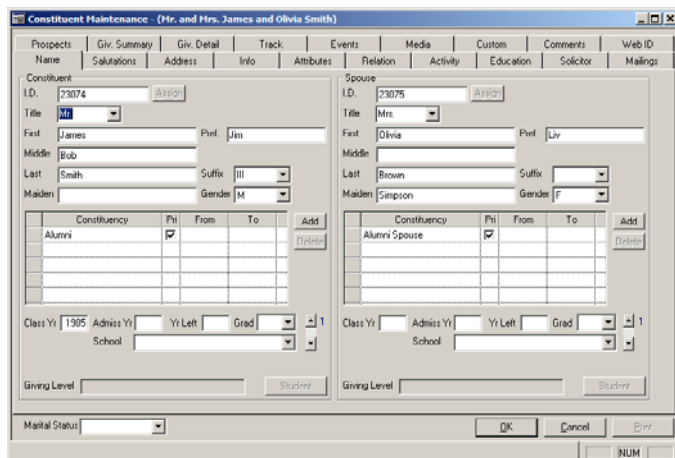
If a 1 was entered as the value for '**What title bar format would you like to use for constituent maintenance?**',
The top of the title bar would display:

Constituent Maintenance – ({Combined Addressee})

A 2 in the value column would display:

({Combined Addressee}) – {Constituent Key Code} / {Spouse Key Code}

This setting was often used to display a key piece of information in a prominent location, for example, **Constituencies**, a **Deceased** status, or **Anonymity**.

Now that this information can be added to salutation formats, the key code field can be used for any purpose and can even be displayed in a new salutation format.
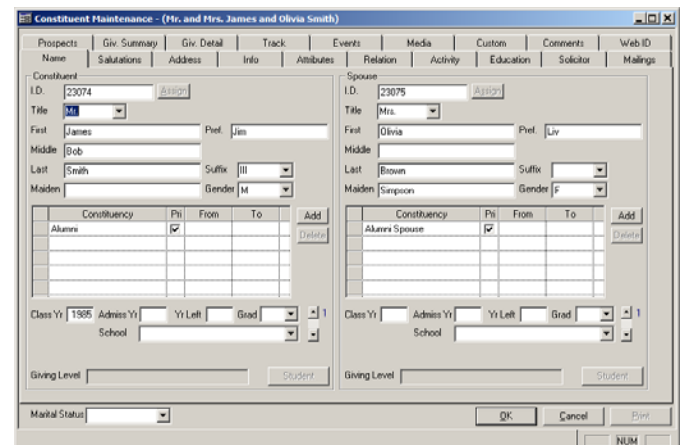

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Note: When in the **Preferences** tab of **Administration Maintenance**, if you type "**title bar**" into the search bar and click the **Search** button, the two preferences pertaining to the title bar appears.
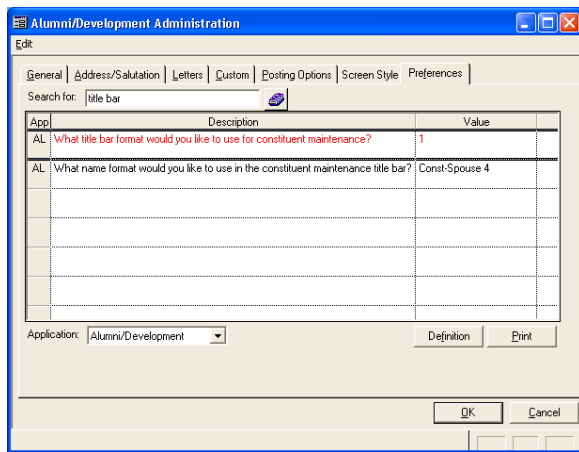
Enter 1 for the first value and your salutation format's name (as it appears in the upper section of the **Address/Salutatio**n tab) for the second value, and the **Constituent Maintenance** title bar will display according to the selected format.

Multiple Moves Notifications

In the **Moves Maintenance** area of **Prospect Managemen**t, you can now notify multiple users simultaneously.
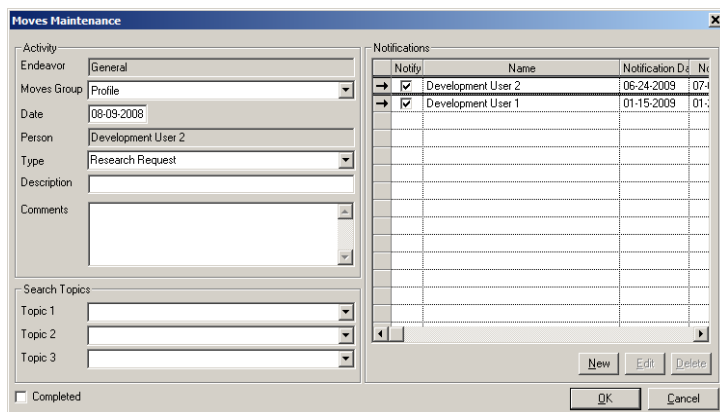
Click **New** to add a new notification recipient. Notification recipients will only be available for selection if they have security access to the selected **Moves** group. Each recipient can be assigned a different notification interval and date, which can be seen by scrolling slightly to the right. The **Notification Date** is the day the user is notified and the **Notify Date** is the reference date entered when the notification was set up.

Notification recipients are able to modify their own **Notify** checkbox on a notification, and can add additional notification recipients, but cannot edit other recipients' notifications. This right is reserved to the user, listed in the **Person** field, who created the move activity item. The **Person** field is no longer editable, as it is required to match a valid user ID to establish ownership of the **Move** activity. This helps users from inadvertently deleting moves they did not create, mistaking their action for deleting the notification. Only the user listed in the **Person** field may delete a **Moves Activity** item.

Giving Details Tab of Constituent Maintenance Has a New Option

The **Giving Details** tab now has a **Writeoff Amount** column.

Grade Type Added to the Relations Tab

Grade Type has been added in the **Additional Information** column. This additional information can help you in **Relation** queries where the student's **Grade Type** is critical to finding the proper constituent relatives. This is also sometimes used by the **Registrar** for subdivisions of Kindergarten or Pre-K grade levels.
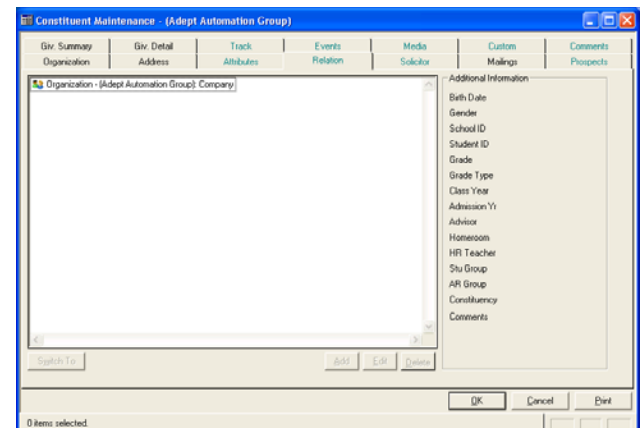
Default Checkbox Added to Fund Maintenance

If you maintain funds that are not generally counted as 'Giving' (for example, event revenue funds), you can use this box to default gifts made to this fund to not be included in Consecutive Yrs. Given. Note that all gifts maintain their own settings for whether they should be included in Consecutive Yrs. Given, and this Fund-level setting acts only as a default setting.

Constituent Global Attributes Insert Checkbox Added

When globally inserting attributes, please note that you can insert the attribute for the spouse of the constituent retrieved by the query by checking the '**Add the Attribute to both the constituent and spouse**' checkbox. Also, note that in earlier versions, a constituent could not possess an attribute in multiplicity. This restriction no longer exists. You can avoid adding an attribute to a constituent who already possesses the attribute by checking the '**Do not add duplicate attributes**' checkbox.

New Display on Name Tab

The word **Deceased** now appears next to the ID field on the **Name** tab of a constituent record if the constituent has been marked deceased. A constituent can be marked deceased by selecting '**D**' from the Lost/Dec dropdown on the **Info** tab.

Tracking and Moves List is Now Separated

Previously, in the **Track** tab of **Constituent Maintenance**, the list of **Activity Typ**es that appeared was combined with the data displayed by the **Moves** sub tab on the **Prospects** tab. Now, the lists are separate from each other.