Alumni/Development
Release Bulletin
August 2012

In this bulletin…

About Release 92_3 Alumni/Development Features

Release 92_3 for Advantage Alumni/Development introduces a new Gift Detail By Date Range report and includes an assortment of smaller enhancements and fixes, such as expansion of comments fields on several screens, and some new report options. There are also some changes in Events Management to add more useful totals to the Attendee List and to improve performance for loading attendee data. Please review the topics in this bulletin for more details.

Please contact Support@senior-systems.com if you have any questions about any of these new features.

Alumni/Development and Events Management Enhancements

Inactive Flag Available for Queries, Exports, and Mailings - In Release 922, we added an 'Inactive' checkbox to the Info tab in Constituent Maintenance. That field can now be used on queries and exports (Biographical node), and as an option on mailings to exclude inactive constituents.

> **Note:** Be careful not to confuse the two similarly named checkboxes on the Mailing screens. The option for 'Active Constituencies Only' refers to the status of the constituency code, and the 'Active Constituents Only' refers to the field on the Info tab for the constituent. To exclude inactive constituencies AND all the inactive constituents in the active constituencies, check both boxes.

Writeoff Comments Field Expanded - The Comments field for a writeoff was previously cutting off the data after 254 characters, even if the user had entered more than that. An enhancement was made to allow this field to accept (and to store, display, and export from the writeoff table) up to 2000 characters.

Prospect Comments Fields Expanded - The Comments fields on the Prospects sub-tabs in Constituent Maintenance have been expanded from the previous limit of 2000 characters to accept an unlimited number of characters. Note that reports will only display the first 4000 characters for these fields, and queries will only look at the first 1000 characters.

Expanded Screen and Comments Box for Prospect > Moves Maintenance - The entry/edit screen for Moves Maintenance (Constituent Maintenance > Prospects > Moves) has been expanded and the Comments area made larger to make it easier to enter and view the data in these Comments fields. To view this screen, click to select an existing Move from the list and then click **EDIT**, or click **ADD** to make a new entry.


'Include Email' Option on Parent Giving Analysis Reports - Email addresses can now optionally be included on the Parent Giving Analysis reports. The 'Include Email' checkbox is located on the Address tab of the report options for each of these reports. The email address(es) print below the constituent address information.

New Option on Gift Report for Pledges - The Gift report has a new 'Use Balance for Pledges' option on the Report Columns tab. This affects any pledge amounts that you use in your custom columns, and determines whether the report displays (and totals on) the pledge balance or the original pledge amount.

> **IMPORTANT:** Select this option carefully, and be aware that it will affect the validity of the totals on the report. So, if your report includes both pledges and pledge payments and you do NOT check this box, your grand totals may not be correct, since the report will be adding both the original (full) pledge amount AND the payment, and therefore double-counting the payment. Conversely, if your custom columns include pledges but do not include payments and you DO check this box, then your grand totals will not reflect the full pledge amounts, but will only reflect the remaining balances.

Honor/Memorial in Queries and Exports - An Honor/Memorial node has been added for exports and queries, including the Description, Name, and Type fields.
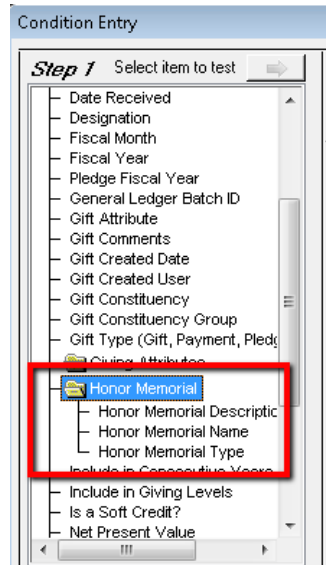
Giving Levels Recalculation - If you recalculate giving levels for a previous year and you have also entered a Fiscal Year Start Date on the Giving Level Maintenance screen for a giving level, the recalculation may not work correctly and may simply remove the previous data from constituent records. To avoid any confusion caused by this situation, the warning message that you receive when you select Giving > Giving Level Recalculation now also includes a reminder to check the dates for your giving levels. You should review the Giving Level Maintenance screens for all giving levels, and (at least temporarily) remove any Fiscal Year Start Dates prior to running the recalculation.
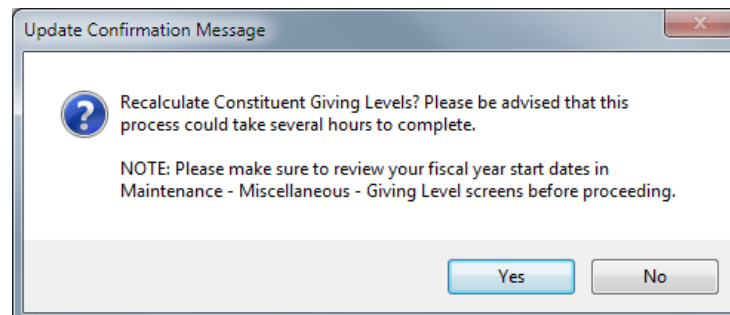
Events Management

Attendee List Enhancements - The Attendee List report has been enhanced to show totals for the numbers attending, not attending, and undecided for each event to aid in event planning. Some other enhancements were also made to information displayed on the report, page breaks, and sub-totals to make the report easier to read and more useful.

Activity Attendees Screen Performance Enhancement - Some schools were experiencing significant performance issues when loading the list of attendees for an activity. Program logic was changed to improve performance in this area.

Gift Detail Report By Date Range

The new Gift Detail Report by Date Range gives you the ability to see the status of Gifts, Pledges, Payments, and/or Writeoffs within a selected date range. In addition to the standard query options, you can filter for certain funds and constituencies, and you can pick pre-defined date ranges, such as 'Calendar YTD' or 'Last fiscal year', or specify your own custom date range.
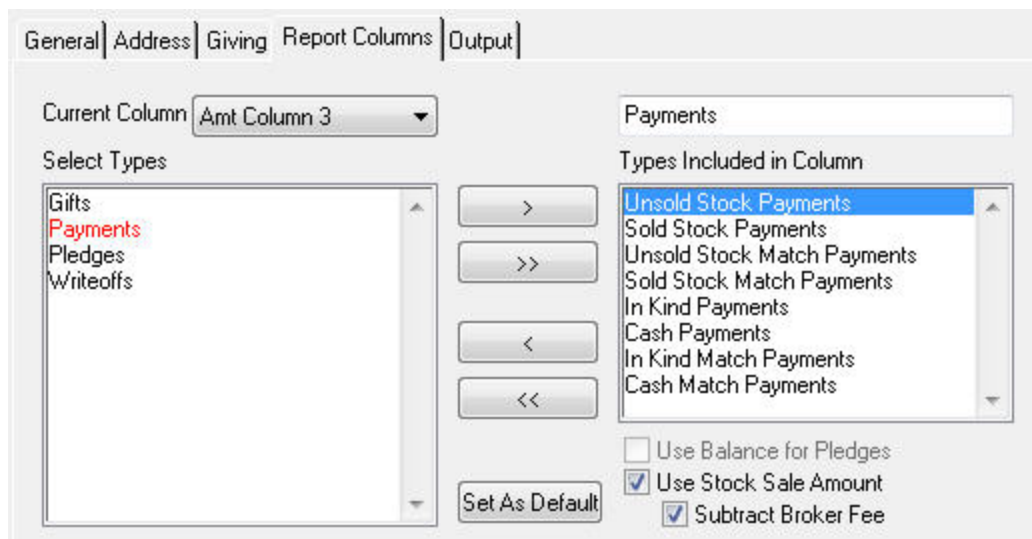
> **Note:** Use the 'Date To Use' field to specify whether you want the system to report on the Gift Date or the GL Post Date. If you select GL Post Date and there is no GL Post Date for a record, the system will use the Gift Date.

The values that appear on the report reflect the balances as of the end of your specified date range. You can view data per-fund by selecting 'Summary' format, or per-constituent by selecting 'Detail' format. On the Giving tab of the Report Options screen, you can specify how to display anonymous donors (as 'Anonymous', listed by constituent ID, or marked with an asterisk).

This report is highly customizable. The Report Columns tab gives you the flexibility to specify exactly what information you want to see in each of the five report columns (similar to the Report Column tab on the Gift Report).

- Use the Current Column dropdown to select which column you would like to configure.

- You can customize the column title that will appear on the report using the editable field to the right of the Current Column dropdown. This column title will appear on the report.

- Use the arrow buttons between the Select Types and Types Included lists to specify the data that appears in each column. You can choose from four data types: Gifts, Payments, Pledges, and Writeoffs. Double-click a data type to drill down to more specific options.

- Depending on the selected Type(s), you can use the checkboxes below the Types Included section to further specify how you want your data to display on the report.

- As with the existing Gift Detail Report, you can create, modify, and share report templates. You can also use the **SET AS DEFAULT** button on the Report Columns tab.

Upon database update, all users (and user groups) with the Gift Detail Report security key will have access to the By Date Range report.

Gift Detail Report By Date Range - Summary

Gift Detail / Summary Report
Summary Format

3/5/2012 to 4/7/2012

Fund Name	Giving Count	Pledges	Stock G&P	Gifts	Payments	All Giving
Annual Fund	4,935	219,123.83	14,677.01	1,043,783.11	867,884.67	1,931,292.44
Alum Auction	534	0.00	0.00	626,480.71	0.00	626,480.71
Athletics Fund	171	150.00	0.00	126,080.00	0.00	126,230.00
Capital Campaign	473	845,900.37	64,130.29	389,127.05	1,159,625.78	1,936,410.75
Golf Event	171	150.00	0.00	126,080.00	0.00	126,230.00
Good Neighbor Event	12	0.00	0.00	4,350.00	0.00	4,350.00
Miscellaneous Gifts	126	0.00	0.00	24,293.00	0.00	24,293.00
Library Fund	10	200.00	0.00	3,295.00	200.00	3,495.00
Scholarship Endowment	11	0.00	0.00	5,415.00	1,000.00	6,415.00
Grand Totals:	**5,944**	**$1,068,124.20**	**$78,807.30**	**$2,853,322.34**	**$2,036,460.45**	**$5,296,915.37**

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Gift Detail Report By Date Range - Detail

Gift Detail / Summary Report
Detail Format

1/1/2011 to 8/9/2012

Full Name	Date Recd	Fund Name	Pledges	Writeoffs	Gifts	Payments	All Giving
Cooper, Jaqueline 11 South St. Houston, TX 77077 832-483-5623 address1@email.com							
	09/09/2011	Christmas Fund	$0.00	$0.00	$20.00	$0.00	$20.00
	09/28/2011	Annual Fund	$100.00	$0.00	$0.00	$0.00	$100.00
	04/26/2012	Annual Fund	$0.00	$0.00	$0.00	$50.00	$50.00
	03/03/2012	Annual Fund	$0.00	$0.00	$0.00	$50.00	$50.00
	06/09/2012	Annual Fund	$0.00	$0.00	$0.00	$50.00	$50.00
	06/30/2012	Annual Fund	$0.00	-$500.00	$0.00	$0.00	-$500.00
	08/17/2012	Annual Fund	$0.00	-$50.00	$0.00	$0.00	-$50.00
Totals:			$100.00	$-550.00	$20.00	$150.00	$-280.00
Crawfork, Ervine 2828 Green Court, #7B Houston, TX 77077 (713) 592-0420 address2@email.com							
	09/17/2011	Christmas Fund	$0.00	$0.00	$25.00	$0.00	$25.00
	10/14/2011	Annual Fund	$0.00	$0.00	$100.00	$0.00	$100.00
	04/16/2012	Annual Fund	$0.00	$0.00	$0.00	$200.00	$200.00
	04/14/2012	Annual Fund	$0.00	$0.00	$0.00	$200.00	$200.00
	05/27/2012	Annual Fund	$0.00	$0.00	$0.00	$100.00	$100.00
	08/09/2012	Annual Fund	$0.00	-$200.00	$0.00	$0.00	-$200.00
Totals:			$0.00	$-200.00	$125.00	$500.00	$425.00
Crimmson, Kent 98 Main St. Houston, TX 77077 address3@email.com							
	09/17/2011	Annual Fund	$0.00	$0.00	$250.00	$0.00	$250.00
	09/16/2011	Annual Fund	$0.00	$0.00	$250.00	$0.00	$250.00
	10/26/2011	Tribute Tickets	$0.00	$0.00	$150.00	$0.00	$150.00
	10/18/2011	Annual Fund	$0.00	$0.00	$250.00	$0.00	$250.00
	10/20/2011	Tribute Tickets	$0.00	$0.00	$150.00	$0.00	$150.00
	04/02/2012	Annual Fund	$0.00	$0.00	$0.00	$250.00	$250.00
	08/09/2012	Annual Fund	$0.00	-$250.00	$0.00	$0.00	-$250.00
Totals:			$0.00	$-250.00	$1,050.00	$250.00	$1,050.00
Grand Totals:			**$50,753.00**	**$-14,902.00**	**$138,894.10**	**$151,584.00**	**$297,453.60**

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