



### General Enhancements

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- Users can now specify a large and small logo to be optionally included in their reports.
- Enhanced the "Form Letters" tab of the report configurators to include an option to combine individuals of the same household onto a single letter.
- Added a main "Navigator" screen to assist the user in navigating through the program. Shows relationships between each section (module) of the program and provides a quick navigational pop-up menu when the user clicks on a particular module's icon.
- Added data file synchronization capabilities which now allow the user to merge 2 or more different CH2004 data files into one. With this capability, 2 users working on non-networked computers can be adding, deleting, and modifying data independently of one another. Then, when they desire, the 2 different CH2004 data files can be merged into one.
- Redesigned directory reports to reduce generation time.
- Added a new "Find & Replace Wizard" that enables the user to easily make global data modifications based on user specified "find and replace" parameters.
- Enhanced several of the report configurators to include an "Email" tab making it easier for the user to communicate to their congregation via email. Several aspects of the email functionality have been improved including the ability to produce bulk emails in a personalized manner - using each record's "greeting" within the email. Email functions are now completely automatic and no longer require the user to perform a "paste" function to transfer the email addresses to their Email program. Works with any MAPI compliant Email client such as Outlook Express® and Microsoft Outlook®.
- Enhanced all report configurators with a "Labels" tab to now include printing directly to envelopes. The "Labels" tabs have been renamed to "Labels/Env's".
- Enhanced the "Form Letters" tab of the report configurators so that it now provides a full Rich Text Format (RTF) editor. This allows full font formatting (bold, underline, italics, size, etc.), bullets, the ability to insert graphics, and most all of the other formatting capabilities such as in Microsoft Word - all from within the CH2004 program.
- Improved the handling of jpg, gif, and tif image file formats in photo directory reports. Previously, under certain circumstances, using these image formats would add considerably to the report generation time and would even sometimes cause the report generation to fail due to low system resources.
- Enhanced several of the report configurators to have them automatically remember the user's last settings when re-opened saving the user time in adjusting the report configurators parameters.
- Provided an easy way for the user to create a new blank data file from the "Tools" menu. Previously the user had to manually make a copy of a data file template through Windows Explorer.
- Enhanced the Setup forms so that renaming any pull-down list item will be reflected throughout the existing records in the database.
- Enhanced the Yahoo Mapping functionality to have the mapping link show detailed directions from the church's address to the selected address - as opposed to simply showing the address on a map. A new Preference option controls if the Yahoo Mapping functions in the original mode (simple map) or this new directions mode.
- Enhanced date fields on data entry forms so that the slashes (/) are automatically entered. This speeds up data entry for the user since they now only need to type the date's digits.
- Enhanced the Backup feature by adding a "verify" option to verify that the backup was created successfully on the backup media and by adding a "Browse" button to select the destination for the backup.

- Added new "Photo Sheet" style photo directories.
- Provided a new Preference option to have Explorer views automatically "refreshed" based on changes the user makes in the Detail view screens.
- Added "Browse" button in the Preferences form for selecting the Photo File Path (the location of the photo image files). Previously the user had to manually type the exact desired folder path location.
- Added a "Primary" and "Secondary" report header to the Setup form. Enhanced report configurators to allow selection of desired header at report generation. Previously a single header option was provided as a local Preference setting.
- Layouts of directory reports have been improved for readability and to reduce paper usage.
- Enhanced the Restore feature by adding a "Browse" button to locate the previously created backup file and by allowing the user to view detailed information about the backup before applying the restore. Also improved restore process so that if the process fails, the current data file is left unaffected.
- Enhanced the "Created" and "Modified" filter nodes of the Explorer views to include additional entries such as "Last 30 days", "Last week", etc.
- Added optional input mask for phone data fields. User can choose from multiple format options - including no format at all. Helps speed data entry and results in consistent formatting of phone number data.
- Enhanced Email address fields so that a check/validate on the syntax of the email address is performed as the data is entered.
- Enhanced data entry validation to prevent the user from assigning duplicate Env#'s across the 3 contributor types (i.e. Households, Individuals, and Contacts). Previously the user could not assign the same Env# to 2 Household records, but they could assign the same number to a Household and to an Individual.
- Enhanced the Yahoo Mapping function to include a new Preference setting that selects the desired online mapping link. Current selections are "Yahoo Maps - US & Canada" and "Yahoo Maps - UK".
- Enhanced the Postal Code Lookup Table functionality to now include the Country, Region, and Sub-region fields so that these fields are populated (along with the City and State fields) when the user enters a Zip/Postal Code.
- Enhanced the Security system by adding a new permission setting labeled "Data file Restore and Synchronize". This allows better control over what users should be permitted to perform these functions which can have drastic affects over the data.
- Enhanced the administration of the Security system so that users with Administrative permissions can change passwords of other user accounts.
- Added new permission level named "Delete" in the CH2004 Security System. This provides security administrators with tighter control over which users may delete records (as opposed to simply modifying existing records).
- Added option during product install to install a PDF printer to allow the user to create PDF files of their CH2004 reports. PDF files can then be viewed by others who do not have the CH2004 program.
- Added new item under the product's "Help" menu labeled "Check for newer version or update". This provides a quick method for the user to check whether or not they are running the most recent version/update of the product. (requires Internet connection)
- On the initial login screen, added button to select a different CH data file.
- Added an auto-compact function when exiting the CH2004 program that analyzes the file size of the CH2004 main application file. If this size is above a "normal" amount, the application file will be automatically compacted upon shutdown of the CH2004 program to ensure optimal performance. NOTE: MS Access database files such as the main CH2004 application file tend to grow in size (sometimes unnecessarily) as they are used.



## Households & Individuals Enhancements

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- Added a "Private" checkbox for the Emergency Contact Ph# field for individual records.
- Enhanced the generation of the Household name, label, and greeting fields to exclude individuals who have a membership Status value of "Inactive".
- Enhanced booklet-style directories to include a larger photo format.
- Added an Individual's "Age" field to the list of available fields for custom filters and to the fields available in the Custom Report Generator.
- Enhanced the Household Directory Configurator by now allowing the user to apply a custom filter to specify which household individuals are to be included in any of the "w/Member Detail" format household directories.
- Enhanced the "Milestones" tab of the Individual Detail Form to include calendar buttons next to each milestone date in order to speed data entry and improve convenience for the user.
- Enhanced the Individual Detail Form to prompt the user when setting a person deceased as to whether or not they'd like the individual to be automatically removed from all groups they currently have membership in.
- Enhanced the Household Detail Form so that when modifying the household's Status it prompts the user as to whether or not they'd like the Status of all household individual records to be modified to the same value.
- Added a new Preference setting that automatically sets the Status value of new individual records to the Status value of their Household.
- Enhanced household-based booklet style directories to include Email addresses.
- Improved the opening of the Household Detail, Individual Detail, Contact Detail, and other Detail forms. Previously the user would always see briefly the first record in the Detail form before the form was moved to the target (desired) record.
- Improved performance (reduced processing time) when clicking the "Save" button on any Detail Form when it's Explorer View is open in the background (for example, the "Save" button on the Household Detail Form when the Households Explorer is open in the background).
- Enhanced the Status bar area of the Household, Individual, and Contact Detail Forms to now include a "Filter" indicator. This indicator will remind the user when they've applied a filter to the Detail form using the right-click menu filtering options.
- Enhanced the bulk email logic when emailing Individuals so that the program searches for a stored Email address in the following order: (1) Individual's primary Email address, (2) Individual's secondary Email address, (3) Individual's Household email address. When searching for an Individual's email, once the search finds a stored email address for an Individual, it captures this email address to use for the email delivery and stops the search.
- Added button to "Attendance" tab of Individual Detail Form to open the Individual Meeting Attendance Report Configurator.
- Added "First Name" and "Last Name" as displayable fields in the Individuals Explorer. Previously the combination of the First & Last name ("John Smith" and "Smith, John") was available, but not these fields individually.



## Group & Group Membership Enhancements

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- Enhanced the Group Membership Directory Configurator to allow the user to base the output on a single group or on the combination of 2 groups. For example, this enhancement now allows the user to generate an output (mailing labels, directory reports, emails, etc.) for "Individuals who are members of Group A and Group B", "members of Group A or Group B", "members of Group A, but not members of Group B", and so on.
- Enhanced the Filter tab of the Group Membership Directory Configurator to include a group "Position" list in the Simple Filter section.
- Added a Group Utility report to allow the user to print the current Group structure.
- Enhanced the Group Detail Form's "Find" pull-down control to sort by Category, then Parent-level Group, then Child-level Group to make it easier for the user to locate the desired Group.

- Enhanced Group Membership tracking by adding a "Withdrawal Date" to each group membership record. This allows the user to maintain Individuals in a Group who have withdrawn in order to keep record of their past involvement in the Group.
- Enhanced the Groups Explorer so that the user can now double-click on the name of the Group to have the Group opened in the Group Detail Form (previously had to right-click on Group and select 'Open Group' from pop-up menu).
- Enhanced the Group Detail Form by adding a "Clone" button which will copy the current group and group membership to a new group.
- Added "Quick Find" control to the "Group Membership - Add" form (used when assigning a specific Individual to one or more Groups from the Individual Detail Form).
- Enhanced the Find pull-down control on the Group Detail Form for performance improvements.
- Improved the performance of the "Group Membership - Add" form (used when adding a specific Individual to one or more Groups from the Individual Detail Form).
- Enhanced the filtering capabilities of the Group Membership Directory Configurator so that the Group Membership Position field can be filtered on when selecting to report on a Parent-level Group (previously the Position field was only available when reporting on a Child-level Group). Also, when reporting on a Parent-level Group, Group Membership based Custom Filters are now available (previously only Individual-based filters were available when reporting on a Parent-level Group).
- Improved performance (load time) for the "Membership" tab of the Group Detail Form.
- Improved performance (load time) when clicking the "Add to Additional Groups" button on the "Groups" tab of the Individual Detail Form.
- Improved performance (reduced processing time) when clicking the "Find" button from the Group Detail Form.
- Added the "Parent Group Name" field as an available field when building group membership based custom reports and custom filters.



## Contributions & Pledges Enhancements

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- Enhanced pledge module to support multi-year and fiscal year pledges. Previously each pledge record was based on a calendar year timeframe. For non-calendar year based pledges, or multi-year pledges, multiple pledge records were required to accurately record these pledges. Now the user can represent these pledges with a single pledge record saving time during data entry and more clearly communicating this information to contributors.
- Enhanced the Contributions module by adding a "Payment Type" field (cash, check, credit card, etc.), a "Payment Date" field (previously all contributions had the date of the Batch), and a Note field for each contribution record.
- Enhanced the batch deposit slip report to include money orders along with checks and cash.
- Enhanced the QuickBooks IIF (Intuit Interchange Format) file generation to support Major/Minor income accounts. Also enhanced the Funds setup to allow the user to specify a specific QuickBooks "Class" for each CH2004 Fund.
- Added a comment/note field for contribution Batch records.
- Enhanced the Contribution Batch Detail Form so that after selecting a Contributor from either the "Contributor" or "Env#" pull-down, an indicator will be shown if the selected Contributor has an active pledge in the system.
- Enhanced data entry validation to prevent the user from entering a new Batch with the same Batch# as an existing Batch record.
- Enhanced the Household Detail Form, Individual Detail Form, and Contact Detail Form so that after the user assigns an Envelope# to the record, the program will prompt as to whether or not they'd like the program to set the record as a Contributor Type. This prompt can be disabled through the program's Preferences if desired.
- Added bank "Account Number" to the Contributions Setup form and enhanced the Contribution Batch Deposit Slip report to display this information.
- Enhanced the Contribution Batch Detail and Pledge Detail forms so that the user can pause during data entry, enter additional funds in the Contributions Setup Form, and then return to the data entry process with the new funds available from the "Funds" pull-down control.
- The "Contributor" pull-down control and the "Last Contrib Date" field located on the Household Detail, Individual Detail, and Contact

Detail are now hidden from users who do not have at least "Read" permission to the Contributions module.

- Added option to the "Filter" tab of the Contribution Statement Configurator to allow the user to produce contribution statements for all Households, Individuals, and Contacts who have been designated as "Contributors". This would include "Contributors" even if they have not contributed within the specified time frame. Additionally this would exclude Households, Individuals, and Contacts who may have contributed during the specified time frame but are not designated as "Contributors".
- Added new Display option to the Contribution Report Configurator which now provides a contribution report that shows each contributor and their contributions in a monthly breakdown.
- Enhanced the Pledge Report Configurator to repeat the column headers at the top of each page.
- Enhanced the Pledge Report Configurator to now include a "Show current (To Date) Pledge as Thru" pull-down control. Previously the computer's current date was used to calculate the current ("To Date") pledge amount.
- Enhanced the Contribution Batch Detail Report Configurator to provide an export option for PeachTree.
- Added option to the Contribution Receipt Configurator to print the contribution's note/comment field.
- Added a "Show Current Pledge as Thru" control to the Contribution Statement Configurator (under the "Include Pledge Status" checkbox) to give the user better control as to how the current pledge data is shown in the Pledge Status section of the statement.
- Added a new "Contribution Summary - Canadian Style" display option to the Contribution Statement Configurator.
- Added a new "Copy Batch" function to the Contribution Batch Detail form to quickly create a new batch based on a current batch (copies Batch and all of the contributions in the Batch to a new Batch).



## Meetings & Attendance Enhancements

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- Modified the terminology for the "Week#" on the "Attendance" tab of the Individual Detail Form. Week #1 is now considered to be the 1st 7 days of the month, Week #2 the next set of 7 days, and so on. Previously Week #1 was defined as the 1st line on a monthly calendar, Week #2 as the 2nd line, and so on.
- Enhanced the Meeting Roll-Call Report configurator to allow the inclusion of each individual's birthdate and the names of the Guardians from the individual's household if desired.
- Enhanced the Meeting Detail Form to include additional "manual count" figures. The following fields were added and placed on a new "Manual Counts" tab of the Meeting Detail form: "Visitor Count", "Vehicle Count", "Children Count", "Adult Count", and "Other/Misc Count". These fields were also added as selectable fields in the Meetings Explorer and they were also added to the Meeting Summary Report Configurator.



## Visitations Enhancements

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- Enhanced Visitations module to include a "Purpose" field so that the user can more accurately track why the visitation occurred. The Purpose pull-down can be populated with user-defined values.
- Enhanced the Visitation Detail Report to include address and phone# data on report.
- Enhanced the Visitation Detail Form so the user can now add new entries to the pull-down lists (method, purpose, etc.) right from the Visitation Detail Form (without having to open the Visitations Setup screen).
- Added the Visitations module's "Purpose" field to the "Visitations" tab of the Household Detail and Individual Detail forms.



## Reminders Enhancements

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- Enhanced Reminders module so that a pop-up message is displayed when Reminders are acknowledged.
- Enhanced Reminders module to include a "From" field to track who the reminder is from. For example, the Reminder might be "for" Jane, but it was created for Jane by Susan.



## Custom Report Generator Enhancements

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- Enhanced the export function of the Custom Report Generator so it now prompts the user as to whether or not they'd like to view the exported file upon completion of export.
- Enhanced "Step 1" of the Custom Report Generator to allow the user to easily create a copy of an existing custom report.
- Enhanced the Custom Report Generator to allow sorting on fields not shown.
- Enhanced the Custom Report Generator by adding a "Show only Distinct values" checkbox to "Step 3" to eliminate duplicates in the output if desired.
- Enhanced the Custom Report Generator to allow the user to save their manually edited SQL Statement modifications. Previously the Custom Report Generator enabled users to manually modify the SQL Statement, but provided no way to save these manual edits and would always revert back to the automatically generated SQL Statement when the report was re-opened.



## Palm Pilot Export Utility Enhancements

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- Enhanced the Palm Pilot Export Utility to allow the user to specify the specific Categories in their existing Palm address book that they would like to be maintained during the export process. Previously only Palm address book entries in the "Unfiled", "Business", and "Personal" Categories were maintained.