# Church Helpmate 2006
## What s New

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## Highlights

- ### Memorized Outputs

**Details:**
Most of the report configurators have been enhanced with the ability to "Memorize" all aspects of the report configurator's settings - including filter settings. These new Memorized Outputs (directories, reports, labels, form letters, emails, etc.) literally store all settings necessary to generate the output defined by the user. A new "Memorized Outputs" form allows the user to recall these stored outputs by simply selecting the name they gave the Memorized Output. This allows the user to generate the output right from the Memorized Outputs form – without even having to open the correct report configurator.

**Why is this good news for you?**
Many of the reports and other outputs you generate from CH are outputs that you (or someone else from your organization) will re-generate in the future (sometimes on a daily or weekly basis). Having to adjust the various controls and filter settings on the report configurator each time the output is generated, can be a tedious task, and can lead to errors and extra expenses. Take for example a case where you just sent out a color photo directory to your printer, and then realized that you didn't apply the correct filter to the report configurator before you sent out the print job. With the new "Memorized Outputs" these repeat outputs will be a breeze. Just adjust all the desired settings on the report configurator - then use the "Memorized Output" feature to save every detail. Then you (or someone else from your organization) can regenerate the output using the descriptive name you've given your Memorized Output (For example, "Welcome Form Letters for 1st time Visitors Last Week"). This feature literally reduces potentially dozens of steps down to just a couple of clicks. Now that's good news!

- ### Church Health & Statistics Module Added

**Details:**
The CH2006 version adds totally new church "Health & Statistics" module. This new module provides you with week by week tracking and analysis of over 60 important data fields such as Membership Enrollment, # of Members Added, Worship Service attendance, Contributions received, and more. Most of these fields can be "auto-filled" by pulling from the data already in your CH2006 database – though all fields can be manually overridden if desired. This module also allows you to define targets and ratios for several key church health indicators such as Per-Capita Giving, Small Group Ratio, Conversion Growth Ratio, and more. A weekly health snapshot report provides a comprehensive 20-page report with weekly data comparisons to previous week, previous year, and targets. Snapshot report also includes many insightful charts.

**Why is this good news for you?**
At Helpmate, we believe that your church management software system should play a role in helping you grow a healthy church. While there are certainly many elements to a healthy church that are outside the scope of a software program, the new "Health & Statistics" module of CH2006 provides the tools to track several key church health indicators and trends on a macro level. While the "numbers" only tell "part of the story", they nevertheless do indeed tell a part of the story – a part that may be hidden from the leaders of the church if ignored. Just like a doctor will measure your blood pressure and take your temperature during an office visit as a starting point to diagnosing a problem, the information tracked and analyzed by the CH2006 Health & Statistics module is a starting point in the analysis and growth of a healthy church. Nevertheless, starting points are critical, and we believe that growing a healthy church is a biblical mandate given to the church.

If you are like some churches, you've already been tracking and analyzing many of the elements included in the Health & Statistics module. For you, this new module will save you time by having this analysis incorporated into your CH database, since most of the measurements are automatically pulled from the data already existing within your CH data.

If you're like others, you may have never tracked this type of data for your church. For you, this module may provide insight on the progress of your ministry, as well as identify potential church health problems you may not have been aware of.

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## *Highlights (continued)*

- ### Easily convert and share your CH reports as PDF files

  **Details**:
  We've added a "View PDF" button to the CH2006 print preview toolbar. This button converts the displayed report into a PDF file. We've also added an "Email PDF" button as well. This button converts the displayed report to a PDF file, and then creates a new email message with the PDF file attached – ready for you to send to the desired recipients. (NOTE: These PDF features require Windows 2000 or newer version of Microsoft Windows®)

  **Why is this good news for you?**
  It's likely that you've generated a report in CH and wished to share it with others associated with your organization (ie. a pastor, a staff member, a volunteer, etc.). Until CH2006, there really weren't any great options for this. Certainly you could print the report and distribute the hard-copy – but that's not very efficient (especially when the others are in different locations remote from you). You could send the report to MS Word using the "Publish it with MS Word" function and distribute the report as a Word document. However, this feature typically removes many of the formatting and layout settings and does not have the same "look and feel" of the original CH report.

  This new CH2006 feature allows you to generate an exact duplicate of your CH report in the popular PDF file format. The PDF file format has become the standard for electronic document distribution and publishing. Adobe provides a free PDF reader that allows PDF files to be viewed from any computer. Most computers today have the PDF reader installed. In addition, we've combined the great features of the PDF format with the convenience of email with the new "Email PDF" button. This feature makes it a snap to email others your CH reports. They'll see the CH report just like you see it in your CH report preview window. Now it's easy to share your CH reports with others,… and you'll save money as well by not having to print and mail reports. Now that's good news!

- ### Contribution "Auto-Complete" Data Entry Logic

  **Details:**
  During contribution data entry, the new CH2006 Contribution "Auto-Complete" function automatically recalls the information from each contributor's last contribution – filling in the amounts and fund splits automatically.

  **Why is this good news for you?**
  Many contributors typically give contributions in a similar fashion from week to week. For example, a contributor might regularly give $100 – designating $75 towards the "General" fund and $25 towards the "Building" fund. For the most part, these folks continue this same distribution of giving. Inputing contribution data for these "regular" type contributors will be accomplished much quicker with this "Auto-Complete" feature. The user can always over-ride the auto-complete values if they differ from the previous contribution - and this feature can be completely disabled if desired as well. Another feature to save you time…now that's good news!

- ### Distribute Contribution Statements and Pledge Statements by Email

  **Details**:
  We've enhanced the Contribution Statement Configurator and the Pledge Statement Configurator to provide the option to send statements to contributors by Email. This feature automatically converts each statement to a PDF file, and attaches the statement to a separate email addressed to each contributor. We've also added a new "Statement Delivery Preference" setting for each contributor in your database that let's you specify their preference for receiving their statements (by postal mail, by email, or both). This setting is then utilized when you generate your statements – emailing statements to those who prefer email, and printing hard-copy statements for those who wish to receive their's in hard-copy form. (NOTE: This feature requires Windows 2000 or newer version of Microsoft Windows®)

  **Why is this good news for you?**
  More and more people everyday are switching their preference from paper-based forms of statements, bill payments, invoices, etc. to electronic form. The combination of convenience, cost reduction, and speed of delivery is very appealing. Today more and more church members are open to the concept of receiving their contribution and pledge statements by email. Emailing statements to your contributors converts a slow, labor-intensive process into literally just a few clicks of the mouse. Then there's the postal costs that you'll eliminate. This new feature allows you to continue to send hard-copy statements to those who prefer this traditional method – so you can easily combine sending statements by email and by postal mail. Emailing statements will save you time and reduce expenses. Now that's good news!

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## Highlights *(continued)*

- **Improved Directory Reports**

**Details:**
The Household Directory Configurator was enhanced to provide optional cross reference listings for adult individuals who have a different last name than their household's last name. This is helpful when spouses use different last names, so that the listing occurs in the household directory under both of their last names.

The Household Directory Configurator and Individual Directory Configurator were enhanced by providing the option to display Group Membership information for each Individual in the directory. With this option checked, each Individual's entry will include the names of the Groups in which they belong. The user can configure which Groups are included in this through the new "Include Group on Directory reports" checkbox on the Group Detail Form. This allows the user to control exactly which Groups are shown on directories.

We added a new feature to all directory report configurators allowing the inclusion of a symbol next to each individual's name indicating their Membership Status. Under the setup section of the program, the user can define what symbol represents each Membership Status value. For example, an asterisk (*) could be used to represent individuals with a Membership Status value of "Member". Then in directories, this option would show an asterisk after each individual shown in the directory that has a Membership Status of "Member".

We have redesigned many of the “pseudo booklet" style directory reports from the previous version so that they can be used in conjunction with the ClickBook printing utility (from Blue Squirrel, Inc) - enabling true duplex booklet printing and sorting.

We have incorporated a new "Private" checkbox for Household and Contact addresses. This allows the user to indicate that a particular Household or Contact's address should be considered private - and their address information can be omitted from directory reports.

We also added additional formatting options to all directory reports. These include an option to control whether or not the report's footer (which normally displays items such as the date and page #'s) is shown, an option to hide the letter section breaks (that is, for example, hide the "B" section break that is shown before listing the names beginning with the letter B), and an option to force a page break before each letter section (for example, after listing the "L" names, a page break would cause the "M" names to begin printing at the top of a new page).

A new “4 Photo” sheet photo directory format was added to the existing 9 and 16 photo sheet directories.

**Why is this good news for you?**
Directory reports are arguably the most widely used reports of Church Helpmate. They are great for a variety of purposes and needs. Adding this new flexibility to our directory reports enables you to further customize these reports to better “fit” you and your church. Since many times directory reports are published and distributed to your congregation, getting these reports to look and feel the way you want them to is critical. For some, these enhancements will save you time by eliminating the need to “re-work” your Church Helpmate directories in another program such as MS Word. And certainly the booklet directory enhancement will eliminate a considerable amount of tedious labor involved in manually cropping and sorting pages as was required in previous CH versions. More customizable directory reports to better fit you church’s unique requirements – now that’s good news!

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## Highlights *(continued)*

- ### MS Outlook® Export Utility

**Details:**
CH2006 introduces a new "MS Outlook Export Utility". This utility allows the user to quickly and easily create and maintain MS Outlook contact records based on the Individual and Contact records in their Church Helpmate 2006 database. This utility allows the user to select a filter if desired to limit which CH2006 Individual and Contact records are included in the export. The utility also ensures that duplicate MS Outlook Contact records are not generated when re-running the utility.

**Why is this good news for you?**
Since CH2006 is a complete management database and includes built-in email capabilities, why would one need or want to have their CH2006 records in MS Outlook? Well, the most common reason is so that CH2006 data can be transferred to hand-held PDA (Personal Data Assistant) units such as the Palm Pilot, the Pocket PC, and others. These PDA's come with built-in capability to synchronize with MS Outlook. So, by providing a convenient way for you to transfer your CH2006 data to MS Outlook, we're essentially providing you with a convenient way to load your PDA with your CH2006 data. Imagine having your CH2006 data readily available on your PDA wherever you go. Now that's good news!

- ### Dynamic Date Ranges in Custom Filters

**Details:**
We've added more power and convenience to Custom Filters in CH2006 by allowing the user to define dynamic date ranges – such as "Today", "Last Weekend", "Last Month", "Previous 60 days", etc. in addition to specific date values in their Custom Filter criteria.

**Why is this good news for you?**
In the 2004 version of Church Helpmate, Custom Filters provide a very powerful and flexible method of defining specific subsets of data. However, if the Custom Filter's criteria included a data field, the user was required to specify a specific date in the Custom Filter. This meant that the user would have to edit the filters from time to time to adjust the desired timeframe. For example, if the user desired to create a Custom Filter in the 2004 version that would include all individuals whose "Baptized" milestone date occurred last month, they would be required to designate the exact dates for last month. Now this worked fine. However, when the next month rolled around, the filter was no longer a "Baptisms from last month" filter anymore – since it would be returning Baptisms from 2 months ago based on the specific dates entered. Therefore when using this filter, the user would have to edit the filter and update the dates listed in the filter.

In CH2006, users can now specify dynamic date ranges such as "Yesterday", "Last Weekend", "Last Month", etc. which ensure that filters like these that depend on date fields are always up-to-date…without any involvement from the user. Less work, less steps to remember….now that's good news!

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# *More Enhancements:*

## General

- Enhanced bulk email processing to bypass the security prompt displayed by MS Outlook 2003 which required that each email message generated by CH be verified by the user. The previous version of CH could bypass this security validation prompt for MS Outlook 2002, but not for MS Outlook 2003.
- Added built-in import & export functions to facilitate the CASS certification process. The export process allows the user to easily create a text file of Household & Contact addresses to be processed. Once processed, the import function allows the user to bring in the updated address information performed by the CASS certification process - automatically updating the Household & Contact records with the CASS certified address information. The actual CASS certification process is available from Helpmate Technology Solutions for a small fee, or it can be performed by any number of third-party CASS certification processors.
- Enhanced many of the program's main detail forms (for example, Household Detail Form, Individual Detail Form, etc.) to remember the window's position when it was last closed, and then re-open in that same location on the screen. This is helpful (especially when running with computers at a high screen resolution) to spread out the windows so that they are not always hiding each other – helping the user to better see which forms are open, and making it easier to switch between forms.
- In several of the report configurators having an "Export" tab, enhanced the "Basic Address" export option to be a "Basic Address & Phone#" option - adding the Home Phone field to the data included in the export.
- Designed the screens of the program to be based on a minimum 1024x768 screen resolution. This provides a larger screen area for forms and provides the ability to present more information per form page resulting in an overall better user experience.
- Added the "HouseLastVisit" (Date of the Household's last visitation) field to individual-based custom filters and to the Custom Report Generator.
- Enhanced the Import Utility to include ability to import Group records.
- Enhanced the "File | Open Data File" function by having the program store up to 5 recently opened data files. This allows the user to quickly switch between CH data files without having to use the Browse button to locate the desired data file.
- Added feature which allows the user to select a bitmap image to be displayed in the program's background screen area. The desired image file can be selected under "Setup & Preferences" on the "General" tab.
- Converted back-end data file from MS Access 2000 format to MS Access 2002 format for increased reliability and stability.

## Households, Individuals, and Contacts

- Enhanced the Membership Status field for Individual and Household records to allow the user to indicate how each status value is to be treated in the program. Under Individuals Setup, for each membership status value, the user can indicate which values are to be considered "Active" status values and which are to be considered "Active Attenders". It also allows the user to specify which status values represent individuals who should not be included in their household's automatic label name and greeting fields, and which values should be "ghosted" (grayed-out) in Explorer Views.
- Added new "Security ID", "Allergies", and "Special Needs" fields for Individual records. These new fields can be included in directory reports and in Meeting Roll-Call reports.
- Replaced the previous version's "Main Contact" and "Guardian" checkboxes (found on the "Household" tab of the Individual Detail Form) with a single "Household Position" pull-down control. This new control simplifies the designation of CH individuals by providing the following classifications: "Adult Main Contact (Primary)", "Adult Main Contact (Secondary)", "Adult Other", "Child Main Contact", and "Child". This single "Household Position" field then defines whether the individual is an adult or a child, and which individuals are the "Main Contacts" for the household. All Main Contact individuals (primary and secondary) will be included in their household's automatic label name and greeting fields (with the primary main contact's name appearing first). This single field will simplify data entry for the user and eliminate the sometimes confusing "Guardian" and "Main Contact" checkboxes found in earlier versions.
- Added new WhitePages.com reverse phone# lookup buttons next to each phone# field on the Household, Individual, and Contact detail forms. This button can be used to look up the name and address information for the displayed phone#. This can aide in address & phone# verification and accuracy.

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## *More Enhancements (continued):*

### Households, Individuals, and Contacts (continued)

- Added an enhancement to the Household Detail Form that triggers a dialog box when the user modifies the last name of a household. The prompt asks the user if they'd like for this Last Name change to be also reflected in each of the Individuals in the household. This eliminates the need for the user to modify each individual record in the household with the name change.
- Enhanced the "Simple Filter" controls of many of the report configurators to include the user-defined checkbox fields (previously the user-defined pull-down, text, and date fields were available from the "Simple Filter" section, but not the user-defined checkbox fields). This allows users to specify filter criteria based on user-defined checkbox fields without having to create a custom filter.
- Provided new Preference option to have the photo form automatically open when opening the Household, Individual, or Contact detail forms.
- Added new checkbox associated with each stored email address which allows the user to indicate whether or not the email should be excluded from bulk emails (from any of the report configurators with an "Email" tab). This is helpful when a particular Household, Individual, or Contact has indicated to you that they don't want to receive "bulk" type email messages from you (the church), but you still want to record their email address in case you need to send them a single personal email message.
- Enhanced the "Last Name" field in the Household Detail Form so that it can accurately store non-standard capitalization in certain names - for example those that begin with "van" or "de la".
- Added new options to the Contacts Directory Configurator's "Labels & Envelopes" tab for configuring how the Contact's name and Organization name might both be shown on labels. Previously Contact labels could be addressed to the name of the Contact or the Contact's "Organization" field, but could not include both the name and the organization name. This new feature allows both to be displayed on the labels.

### Groups & Group Membership

- Enhanced the Individual Milestone Report Configurator to allow the user to limit the output to only those that are members of a specific Group (Parent-level or Child-level). So, for example, this would allow the user to create a July birthday report limited to those members belonging to a certain Group.
- Enhanced the Group Detail Form by providing a new "Purposes" section. This new section provides several checkbox fields allowing to indicate the various purposes for the Group (fellowship, teaching, worship, evangelism, etc.). There is also a "Purpose/Mission Statement" field which can be utilized where appropriate. The Groups Explorer has been enhanced to allow Groups to be browsed based on their purposes.
- Enhanced the Group Detail Form by providing a new "Group Type" pull-down control. This control defines the "type" of the group such as "Worship Service", "Small Group", "Sunday School Class", "Ministry Team", "SHAPE Tracking", etc.). The Groups Explorer has been enhanced to allow Groups to be browsed based on the Group Type. This field is used by the new Health & Statistics module to categorize the various groups as to which are related to "Worship Servces", "Small Groups", "Sunday School Classes", and "Ministry Teams".
- Enhanced the Group Membership Add form (opened from the "Membership" tab of the Group Detail Form) so that after the user selects an individual from the "Quick Find" pull-down control, the cursor moves back to the Quick Find pull-down control allowing the user to immediately select another name - without having to use the mouse to click in the Quick Find control.
- Enhanced the "Groups" tab of the Individual Detail Form by allowing the user to open any Group listed by right-clicking on the Group and selecting "Open Group" without having to have the Individual Detail Form in Edit mode.

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## *More Enhancements (continued):*

### Contributions & Pledges

- Enhanced the Contribution Batch Detail Form by adding a new "Create new contributor record" button - allowing the user to begin the entry of a new Household, Individual, or Contact record right from the contribution data entry screen. Also added a new "open contributor" button which can be used to open the Detail Form for the selected contributor (household, individual, or contact) during contribution data entry.
- Enhanced the QuickBooks IIF and Peachtree CSV interfacing by allowing the user (in Funds Setup) to specify a specific Bank account for each fund. Previously a single Bank account was assumed for all Church Helpmate funds. This is very helpful for cases where different Bank accounts are utilized for different funds when making deposits.
- Implemented the recent Revenue Canada requirements that require Canadian churches to include the Canada Revenue Agency's name and website address on all contribution statements.
- Enhanced the Contribution Statement Configurator by adding the following filtering options:
  - specific fund or funds
  - contributor type (household-based, individual-based, etc.)
  - specific membership status (for household and individual based contributors)
  - contributors who have at least 1 contribution over a certain $ amount
- Provided a "Print" button on the Funds Setup screen to allow the user to generate a quick printout of the Fund information.
- Added a new "Envelope# Listing" report that displays information on all envelope number assignments. This report is available from the new "Contributions Utility Report Configurator".
- Enhanced the Contribution Transfer Wizard tool by having it check for pledges after completing the contribution transfer. It provides the user with the option of transferring any pledges that might exist for the contributor as well.
- Enhanced the Contribution Batch Report Configurator to remember the user's last settings when opening.
- Enhanced the Batch Detail Report to include a summary $ breakdown of the Payment Types (ie. Cash, Check, Credit Card, etc.).
- Created a new "Contributors with No Contributions" report that identifies Households, Individuals, and Contact who have been marked as Contributor types, but who have not given any contributions during a specified date range. This report is available from the new "Contributions Utility Report Configurator".
- Added a new Preference setting named "Normal Contributor Identifier" to indicate whether during contribution data entry the user typically identifies the contributor by selecting their name or by selecting their Env#. This setting controls which field (the Contributor Name or Contributor Env#) the cursor returns to after completing a contribution entry - allowing the user to begin entry for a new contribution as quickly as possible.
- Added a new "Default Payment Frequency" Preference setting allowing the user specify the default payment frequency for new pledge records.
- Added a new "Contributions applied to pledge through today's date" currency display field to the Pledge Detail Form. This new field shows the user right from the Pledge Detail Form how much the contributor has given towards the pledge (without having to run any reports to see this info).
- Improved clarity of the pledge information shown on Contribution Statements and Pledge Statements by modifying the "Total Ahead (Behind)" column header to read "Total Payments Remaining". The "Behind" wording used in previous versions was misleading to some contributors - since at first glance it might appear that they were behind in making their pledge payments - even though this was reflecting how much was left to pay for the total pledge.

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# *More Enhancements (continued):*

## Meetings & Attendance

- Enhanced the Group Membership "Position" tracking so that the user can specify for each Position value whether the value indicates an active or inactive role in the group. For example, Positions such as "Participant", "Leader", "Student", etc. can be indicated as "Active" Positions - while Positions such as "Prospect", "Former Participant", etc. can be categorized as "Inactive" Positions. In this way, the user can define which of the Group Membership Position values indicate "Active" group members, and which indicate "Inactive" group members. When Meetings are created for Groups, attendance records will only be created for those individuals with "Active" Position values.
- Enhanced the Roll-Call reports by allowing the user (under Groups Setup) to specify which Group Membership Position values should be included in roll-call reports. For example, the user can specify that certain Positions such as "Participant", "Student", etc. should be included in roll-call reports, while others such as "Former Student", "Prospect", etc. are not included.
- Enhanced the Meeting Detail Form by adding a new "Update list with current active Group Members" button. This button will affect the current Meeting's attendance records in 1 of 2 ways:
  - For any individuals who are currently an active member of the Meeting's Group, but who do not have an attendance record for the Meeting, a new attendance record will be created. This is very helpful if the user has added individuals to the Meeting's Group after the Meeting record was created.
  - For any individuals who are no longer active members of the Meeting's Group, but who have an attendance record for the Meeting, the attendance record will be deleted. This is helpful if the user has removed individuals from a Group or set their group membership position to an inactive value after the Meeting was created.
- Enhanced the Meeting Absentee Report Configurator by allowing the user to include several optional information to the report. These optional elements include such things as Household notes, driving directions, meeting attendance history, and household member names.
- Enhanced Roll-Call reports by displaying the names of the Group leaders at the top of the report.
- Enhanced the Meeting Summary Report Configurator to remember the user's last settings when opening.
- Enhanced Quarterly Roll-call report to include a section in the report's footer to record summary totals.
- Enhanced the Roll-call reports so that they do not show any addresses or phone#'s that have been marked as Private.

## Visitations

- Enhanced the Visitation Report Configurator to provide option to force page break after each report group value (based on the "Group By" parameter). For example, if the "Group By" parameter was set to "By", this option would force a new page break between the different values of "By". This is helpful, for example, when you want to use this report to hand out to those individuals who are performing the visitations. This option provides a clean page break between the various "By" individuals so that each individual can be given information on only the visitations that apply to them.
- Enhanced the Visitation Report Configurator to provide display options for the Household's address and phone#, and also the names of the individuals in the household being visited.
- Enhanced the Visitation Detail Report Configurator to display driving directions for visitations that have a status of "Open" or "Scheduled". Also added the Directions field as an available for the Custom Report Generator (for Visitation-based reports).