



Church Helpmate™ 2008

What's New

Helpmate Technology Solutions, LLC
PO Box 619, Union, KY 41091 www.helpmate.com
sales 888.858.3247
support 859.488.0764

The 2008 upgrade brings you...

Better ways to communicate and keep in contact with your people

- We've added a new "Quick Label" feature enabling you to quickly generate a single mailing label for a Household, Individual, or Contact record. This feature is available from both the Explorer and Detail forms.
- We've redesigned the "Quick Letter" feature to provide more flexibility and to make it simpler to build templates. This redesign now allows you to create and maintain an unlimited number of "Quick Letter" MS Word templates (instead of being limited to just 3 templates). These template files can be placed in any folder or network share (previously, templates had to exist locally on each computer's hard-drive - which was cumbersome for multi-user network installations). We've also redesigned the process inserting merge fields into the MS Word template files by eliminating the previous version's usage of MS Word "bookmarks" (which are a somewhat seldom used feature of MS Word). Now, you can insert merge fields by simply surrounding the merge field name with brackets (for example, "[FormalLabelName]"). The redesigned Quick Letter feature now allows you to quickly choose from an unlimited number of pre-made letters to send to a Household, Individual, or Contact.
- More and more email providers are placing a limit on the number of email addresses that can be included in an email message. For example, some churches are not able to have more than 100 email addresses in single email message. We've enhanced the bulk email feature by providing a new "Max # of email addresses per email message" setting. This feature allows you to circumvent any such limitation by automatically splitting your email message into multiple email messages as necessary. This feature is also helpful in reducing the chances of your email messages being flagged as spam.
- We've enhanced the bulk email feature by utilizing a verification process before emails are generated to check for invalid email addresses. If any invalid email addresses are detected, the process will be cancelled and a report will be shown with details about the invalid email address so that they can be identified and fixed.

The 2008 upgrade brings you...

Better tools to track and analyze contributions and produce more insightful reports and statements

- We've enhanced the Contribution Statement Configurator by adding a new "Detailed Statement Condensed 2-Column" statement layout option. This layout option lists each contribution made during the specified date range, but hides the "Payment Type", "Reference", and "Comment" fields to allow for a more condensed 2-column presentation of the data.
- We've enhanced the Contribution Report Configurator to provide an option to group by Contributor (name or env#) when running a summarized report. This option allows you to easily generate a report that will show each contributor with their total giving amount and breakdown for each fund.
- We've added a new "Contributor Amount Range Distribution" report under the Contribution Statistics Report Configurator. This report allows you to define a series of \$ ranges (ie. \$0.01-\$25, \$25.01-\$50, etc.) and the report will identify the number of contributors that have given amounts within each of these ranges. This type of report is often required by banks when requesting loans.
- We've added the ability for you to store a graphic of a signature to be automatically inserted and displayed on contribution statements. If your church includes an authorized church representative's signature on your statements, this feature will save you significant time and effort.
- We've added a new Contribution import option so that you can import data from external MS Excel files.
- We've enhanced the Batch Deposit Slip report by providing an option to hide contributors' names.



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The 2008 upgrade brings you...

Improved tools to better know and shepherd your congregation

- We've added 2 new summary report options to the Individual Meeting Attendance Report Configurator - "Summary - Monthly Attendance Count for Year" and "Summary - Weekly Attendance Count for Qtr". These new reports enable you to get a nice condensed overview of members' weekly or monthly attendance in order to identify patterns of absenteeism or attendance.
- The Household Detail, Individual Detail, and Contact Detail Forms have been redesigned to implement photos directly within these Detail Form. Previously a separate Photo Form had to be opened to view photos. This redesign incorporates people's photos directly into their Detail Form - enabling you to more easily match names with faces.
- We've enhanced the Individual Milestone Output Configurator by providing an option to include photos of the people shown on the milestone reports. Now you can create photo birthday, anniversary, baptism, etc. reports.

The 2008 upgrade brings you...

Improved data protection and security

- We've added a "recycle bin" to Church Helpmate. Records that are deleted from Detail Forms are sent to this recycle bin - as opposed to being permanently removed from the database. Deleted records can then be restored from this recycle bin as necessary. The recycle bin includes the option to permanently delete any records currently in the recycle bin. With this new Recycle Bin, Households, Individuals, and Contacts can be deleted (sent to the recycle bin) without removing their contributions records from existing batches. Therefore, sending these records to the Recycle Bin will not impact any contribution batches. Never worry about accidentally deleting a record again!
- The Church Helpmate security system has been significantly enhanced by providing you with more granularity of control for each user's permissions (so you'll have much more control over what each user can see and do in the database). The previous "read", "write", and "delete" permission settings have been replaced with more flexible and easier to understand terms including "create new records", "modify existing records", "delete records", "create outputs", "view data on-screen", etc. Included in this enhancement is a permission setting to allow users to enter contribution records, but not be able to see the Contributions Explorer or run contribution reports (preventing them from seeing a contributor's history).
- The Church Helpmate Backup feature has been enhanced so that the .zip backup files created by this utility are encrypted with a password to ensure added security. This is important when sending & receiving backup files using unsecure methods such as email.
- We've added an "auto backup" feature that automatically creates periodic copies of your data file to ensure a recent backup exists without any user interaction. You'll never be left without a backup again!

The 2008 upgrade brings you...

Full Windows "Vista" Compatibility

- If you are not yet running the Vista version of Windows, you know it's only a matter of time. We've totally redesigned the product's installation package making Church Helpmate now completely compatible with the new Windows Vista operating system. This includes compatibility with Vista's User Access Control (UAC), which enables a "standard" user account in Vista to run Church Helpmate.



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The 2008 upgrade brings you...

A better overall user experience with fewer steps, less frustration, greater efficiency, and a boost in the “fun factor”

GENERAL

- We've implemented a major cosmetic "overhaul" to the Church Helpmate program providing a nice, clean modern look and feel. You'll notice the change immediately - though you'll easily adapt as the overall navigational structure remains intact from previous versions.
- We've introduced a new "Color Themes" feature. With this feature, you can now customize the color usage throughout the program from over 30 different themes such as "Coffee", "Chocolate", "The Vineyards", "The 70's", "Radioactive", and many more. You are sure to find a theme that matches your style and mood. Try a different theme each week - and add some color to your day!
- We've redesigned the Navigation Menu along the left-hand side of the screen to provide you with quicker and more intuitive access to the most common menu items.
- We've enhanced the sorting capabilities of the Explorer Views for date, numerical, and currency data fields so that when the column headers of these fields are clicked the data is sorted as expected in chronological or numerical order - rather than by alphabetical sort as was the case in previous versions.
- We've enhanced the Postal Code Lookup feature by allowing you to add entries to this table directly from the Household Detail Form and the Contact Detail Form. We've also modified it to support zip+4 values (for example 41091-9148) so that it keys off of only the first 5 digits.
- The mapping feature in Church Helpmate has been modified to integrate with Google Maps in order to provide better functionality and International capability.
- We've enhanced the "Lookup" buttons on all Detail Forms so that, when clicked, they automatically scroll to show the currently displayed record in the list - instead of always opening to the top of the list.
- We've enhanced the Outputs Explorer so that you can click on the icons for the various available output types (shown in the right-hand section of the Outputs Explorer) to actually open the output configurator and show the appropriate tab for the desired output type (i.e. report, mailing labels, form letters, etc.).

GROUPS

- In order to enhance the overall user experience and reduce confusion, we've implemented a name change in the Groups module. "Parent Level Groups" have been renamed to "Group Folders". In addition, "Child Level Groups" are now simply named "Groups". So, the 3-tier Group structure now consists of "Group Category | Group Folder | Group".
- We've enhanced the Groups Explorer so that when you select a "Group Folder" (previously known as a "Parent Level Group"), the right-hand portion of the Explorer displays full details on each person (instead of only their name). If a person has multiple Group Memberships under the Group Folder, they will have a listing for each Group.

VISITATIONS / CONNECTIONS

- For clarity and to give users a more accurate understanding of this module, the "Visitations" module has been renamed the "Connections" module.
- We've enhanced the Connections Detail Form (formerly the "Visitations Detail Form") by adding a "Lookup" button to the top toolbar area of the form. This "Lookup" button provides you with a listing of Connection records in the database and can be used to quickly navigate to the desired Connection record. Previously only the arrow navigation buttons were available to move from record to record in the Connection (Visitation) Detail Form.



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A better overall user experience with fewer steps, less frustration, more efficiency, and a boost in the “fun factor” (...CONTINUED)

CONTRIBUTIONS & PLEDGES

- We've enhanced the Pledge Detail Form by adding a "Lookup" button to the top toolbar area of the form. This "Lookup" button provides you with a listing of pledge records in the database and can be used to quickly navigate to the desired Pledge record. Previously only the arrow navigation buttons were available to move from record to record in the Pledge Detail Form.
- We've added new preference options for Contribution data entry that enables you to determine whether or not the "Payment Type" and "Reference" data fields are included in the tab sequence. This option will reduce the number of keystrokes required for each contribution if these data fields are not typically used.
- We've enhanced the Contribution Batch Detail Form so that the values for "Payment Type" and "Fund" are not cleared out when a contribution entry is completed. That is, they keep their value while the Contribution Batch Detail Form is open until you select a different value from the corresponding pull-down list.
- We've enhanced the Contributions Explorer and Pledges Explorer when displaying "By Contributor" to combine the left-hand side of the Explorer View into a single listing of contributors (not separated by Households, Individuals, and Contacts). This enables you to more quickly find a desired contributor without having to know whether it is a Household, Individual, or Contact record.
- We've added the ability to generate a contribution or pledge statement for a Household, Individual, or Contact directly from their corresponding Detail Form (Household Detail, Individual Detail, Contact Detail) by adding these options to the Detail Form's toolbar.

REMINDERS

- We've enhanced the Reminders Explorer by adding a new control to show reminders for only the currently selected user (defaults to the current logged in user). This allows each user to automatically show only the reminders that pertain to him or her.



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- We've enhanced the Meeting Roll Call Report Configurator to provide an option to hide address/phone data when generating Quarterly roll call reports. In addition, report logo and header option controls have been added to this report configurator to enable you to include your desired logo and header to your roll call reports.
- We've added a new display options to the Individual Milestone Output Configurator's "Reports" tab allowing the user to show or hide Phone#'s and Address data.
- We've added the household-based user-defined fields as selectable fields for Group Membership based custom filters and for the Custom Report Generator (for group membership based reports).
- We've added the "Active Address" field (which determines whether a household is currently using their Primary or Secondary address) as an available field for Custom Filters and for the Custom Report Generator.
- We've enhanced the export options in 5 of the output configurators by adding 2 additional output formats: basic address & phone in regular TitleCase (not ALL CAPS), and basic address & phone in HTML file format
- We've added a "Last 6 months" option as a new date range value for output configurators and custom filters using dynamic date ranges.
- We've added the "Pledge Month" and "Pledge Year" fields to contribution-based outputs in the Custom Report Generator and to the listing of displayable fields in the Contributions Explorer.
- We've added the "Payment Summary" field as a selected field in the Pledges Explorer and in the Custom Report Generator (for pledge-based reports).

