



# Church Helpmate™ 2010

## 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 2010 upgrade brings you...

#### A better overall user experience with fewer steps, greater efficiency, and less frustration

- We've added a convenient "Quick Search" feature to the main menubar allowing you to find Household, Individual, and Contact records more quickly.

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**BENEFIT:** Saves you time when searching for existing records in the system and helps prevent duplicate records from being entered (eliminating time-consuming re-work)

- We've added a new check reader/scanner option to the Contribution Batch Detail Form for faster contribution entry.

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**BENEFIT:** Significantly reduces your data entry time for check contributions and ensures accuracy

- We've added barcode printing capability to the Roll Call Reports and corresponding barcode scanning capability to the Meeting Detail Form to automate attendance entry.

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**BENEFIT:** Significantly saves you time when entering attendance (typical users will be able to enter attendance with the scanner in about a third of the time it took previously)

- We've added a new feature to the Household Detail Form that allows you to schedule a start and end date for a household's Secondary Address set. Church Helpmate will then automatically switch the household's active address set between the Primary and Secondary address set based on these dates.

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**BENEFIT:** Reduces your admin time by eliminating your need to manually switch between address sets for households that utilize 2 addresses and it ensures that mailings are always sent to the correct address set

- We've added an "I want to..." submenu under the "Outputs" Menu. This "I want to..." menu provides intuitive links to produce various popular output functions – for example, "I want to send an email to members of a group", "I want to create a directory of households", "I want to create form letters for contributors", etc.

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**BENEFIT:** Provides an intuitive method of generating many of the popular outputs and greatly reduces the learning curve for new users

- We've added a new convenient "Auto Update" feature to the "Membership" tab of the Group Detail form. This new feature allows you to automatically manage the membership to a Group based on the results of a Custom Filter (a defined set of criteria). You can select a Custom Filter to be stored with the Group record and can choose to have Individuals automatically given membership to the Group and/or removed from the Group depending on whether or not they meet the Custom Filter's criteria (using the new "Auto Update" button on the Group Detail Form). We have also provided a global update option that will run the Auto Update process on all Group records that have been configured with an Auto Update custom filter (instead of having to open each Group individually to run the Auto Update process) – available from the "Tools | Database Utilities" menu.

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**BENEFIT:** Eliminates the time and effort required to manually add & remove individuals from Groups when a filter can define who should be in (and not in) the Group

- We've enhanced the user-definable fields by allowing the user to specify which of these fields are to be enabled – preventing the unused fields from cluttering up the interface. User-defined fields that are not enabled will be hidden in the Detail Forms and other areas of the program (Explorer Views, Custom Report Generator, etc.).

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**BENEFIT:** Simplifies and streamlines the data entry screens by hiding unused fields

- We've added a new "Lookup" button to the Contribution Batch Detail Form to provide an easy way to view & open a specific Batch.

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**BENEFIT:** Saves you time by allowing you to choose a specific Batch to open right from the Contribution Batch Detail form – without having to use the Contributions Explorer



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#### A better overall user experience with fewer steps, greater efficiency, and less frustration (continued...)

- We've added window re-size capability to the Contribution Batch Detail and Meeting Detail forms  
**BENEFIT:** Allows you to take advantage of larger computer monitors and means less scrolling through long lists of data
- We've enhanced the Explorer Views so that if you open a record in one of the Detail View Forms to make an edit, when you return to the Explorer View screen, it will remember where you were in the list and return you to that position (rather than returning you to the top of the Explorer View list).  
**BENEFIT:** Saves you time and frustration
- We've added the ability to sort records in the Recycle Bin by Record Type, Record Description and Date Deleted (ascending or descending.)  
**BENEFIT:** Enables you to locate specific deleted records much quicker
- We've made it easier to identify and differentiate deceased individuals in the Explorer and Detail View forms.  
**BENEFIT:** Ensures that deceased individuals are easily differentiated
- We've enhanced the duplicate name check feature of the Individual Detail Form so that the check occurs immediately following the name entry - instead of being delayed until after the remaining data is entered and the Save button is clicked.  
**BENEFIT:** Saves you time during data entry and eliminates re-work
- We've added a new optional feature that can automatically remove Individuals from Groups when changing their Membership Status value from an active to inactive value.  
**BENEFIT:** Saves you time by not having to manually remove them from their Groups
- We've enhanced the Explorer Views when using the Zip Code filtering function so that only the first 5 digits of the zip code value are included when displaying the list of zip codes (instead of showing all the unique 5+4 zip code values).  
**BENEFIT:** Makes the "Zip Code" filter feature of the Explorer Views much more useable and meaningful
- We've enhanced the Individual, Household Contacts and Groups Explorers to allow the "private" check box fields for phone numbers to be displayed in the Explorer view if desired (so that you can tell directly from the Explorer View which phone#'s are to be held private).  
**BENEFIT:** Saves you time by eliminating the need to open the Detail View form to see if the phone# is "private" and prevents you from accidentally sharing private phone#'s
- We've enhanced the Contribution Batch Detail Form to provide an optional check for duplicate contributions as they're being entered into the database.  
**BENEFIT:** Eliminates the inefficiencies and hassle of fixing duplicate contribution entries
- We've enhanced the Contribution Batch Detail Form by adding a Lookup button next to the contributor's name that can be used to quickly view the selected Contributor's giving history.  
**BENEFIT:** Provides quicker access to selected contributor's historical data



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### The 2010 upgrade brings you...

#### A better overall user experience with fewer steps, greater efficiency, and less frustration (continued...)

- We've enhanced the Contribution Batch Detail Form by adding a "Sort by" control pull-down list for the contribution details listing at the bottom of the form.  
**BENEFIT:** Provides easier method for locating specific contributions within a Batch

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- We've enhanced the Splits Wizard to key off of the Payment Date in the Contribution Batch Detail form, not the Batch Date.  
**BENEFIT:** One less step to worry about during contribution data entry

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- We've enhanced the Postal Code Lookup Table form by adding a "Load all US Zip Codes" button to automatically populate the table with all the current US zip code, city, and State values.  
**BENEFIT:** For churches in the United States this is a great way to ensure that you have all the cities, States, and zip codes in the database for quicker and more accurate data entry

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- We've created a new Preference setting to allow you to disable the Postal Code Lookup Table functionality when entering address data if desired.  
**BENEFIT:** For churches outside the United States, this option can speed up the address data entry process

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- We've enhanced the Groups Explorer by allowing you to display both Individual and Household User-Defined fields in the Groups Explorer.  
**BENEFIT:** Adds convenience by eliminating the need to open the Individual Detail Form or Household Detail Form to view this information

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- We've enhanced the Contributions Explorer by including the Contributors' names when using the "By Env#" display option.  
**BENEFIT:** Adds clarity to the information presented, especially for contributors with no env# assigned

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- We've added a "Generate Statement for Contributor" to the right-click menu of the Contributions Explorer.  
**BENEFIT:** Adds convenience and eliminates extra steps when generating statement for a particular contributor

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- We've made a change when displaying age values so that the program will no longer calculate and display ages for individuals who have been marked as deceased.  
**BENEFIT:** Provides more accurate display of data



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### The 2010 upgrade brings you...

#### Better insight to managing & shepherding your congregation

- We've added a new configurable "Dashboard" summary screen that can present important information such as upcoming birthdays & wedding anniversaries, new members added, new households entered, upcoming scheduled connections, contribution summary data, etc. The Dashboard is customizable to suit your preferences and can be displayed automatically on program start-up if desired. Printing capability directly from this Dashboard tool is also provided.

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**BENEFIT:** Notifies you of time-sensitive information that is important to you and displays it on program start-up - so you don't have to worry about forgetting to check on this data

- We've added a new "Map" tab to several of the Output Configurators that will display an interactive geographical map of the addresses included in the output. This mapping feature is driven by Google Maps. Pushpins will be displayed at each address location. When a pushpin is clicked, a pop-up window will display the name and address info for that location.

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**BENEFIT:** Provides you with a powerful demographics tool for visualizing the locations of the people that interact with your church...allowing you to quickly see the address locations for members, visitors, contributors, group members, and other sub-sets of your database

- We've moved the Household, Individual, and Contact based "statistics" reports to their corresponding main output configurator. For example, the previous "Household Statistics Report Configurator" has now been implemented into the Household Output Configurator (with a new "Statistical Reports" tab).

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**BENEFIT:** You can now apply filter criteria to limit what records are included in these reports - making them much more useful.

### The 2010 upgrade brings you...

#### Better ways of communicating & staying in contact with your people

- We've totally revamped the way Church Helpmate processes bulk Emails. We've built into Church Helpmate a complete SMTP email processing system – which means that all email processing occurs right from within Church Helpmate – without having to run another email program such as Outlook, Eudora, etc....or having to use a third-party email service.

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**BENEFIT:** Allows a much simpler setup process and ensures that the emailing capabilities of Church Helpmate will work no matter what programs you might have installed (or not installed) on your computer

- We've enhanced the bulk email capabilities by allowing you to build and design HTML formatted emails right from within Church Helpmate – great for emailing newsletters and announcements. We've also increased the number of files you can attach to an email from 1 to 3 files.

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**BENEFIT:** You are no longer confined to boring "plain text" emails from Church Helpmate! Add color and graphics to your emails! Eliminates the need to use expensive 3<sup>rd</sup>-party email services.

- We've added a new "Name & Email Address" export file type to several of the output configurators.

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**BENEFIT:** Allows you to more easily interface with third-party email services if desired



### The 2010 upgrade brings you...

#### Better & more flexible reporting capabilities

- We've enhanced the "Labels & Envelopes" tab of the Individual Output Configurator and the Group Membership Output Configurator by providing the option to configure and print name badges.  

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**BENEFIT:** Allows you to print name badges for events and meetings right from within Church Helpmate – no need to create these manually or deal with complex export and mail merge procedures.
- We've enhanced the Roll Call Reports by allowing you to add Emergency Contact Information for each individual on the report.  

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**BENEFIT:** Allows teachers and leaders to have important contact information needed for emergency situations
- We've enhanced the Individual, Household, and Contact Profile Reports so they are presented in a much more condensed fashion by removing blank spaces and unused data fields. Additionally, if contribution data is included on the profile report, it will be shown in a summarized fashion rather than showing each contribution record individually.  

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**BENEFIT:** Significantly reduces the number of pages required for each record's profile report - saving you paper and improving the readability of the information presented
- We've enhanced the Individual, Household and Group Membership directory feature by allowing you to include any of the User-Defined fields.  

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**BENEFIT:** Increases the program's ability to generate directories and other reports with the information and format that you need - eliminating the time, hassle, and complexity of building custom reports outside of the program or building reports manually in other programs such as Microsoft Word
- We've enhanced directory reports available from the Individual Output Configurator and the Group Membership Output Configurator by providing a new display option to include Milestone data for each Individual.  

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**BENEFIT:** same as above
- We've enhanced the directory capabilities of the Household Output Configurator by providing new display options to display phone#'s and/or emails addresses of the household's main contact individuals without having to choose a directory layout that includes "with member details."  

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**BENEFIT:** same as above
- We've added the option to show record count totals on Household, Individual, Contact and Group Membership Directories.  

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**BENEFIT:** same as above
- We've enhanced the Individual Milestone Report to display Cell Phone numbers when the "Display Phone#'s" option is selected.  

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**BENEFIT:** same as above
- We've added a new option when generating directories from the Group Membership Output Configurator to display the names of the Groups that each Individual is a member of.  

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**BENEFIT:** same as above
- We've added 2 new reports to the Pledges Utility Report Configurator – a "Contributors with No Active Pledge" report to show a list of Contributors who do not have an active Pledge in the System and a "Contributors with Active Pledge" report to show a list of Contributors that *do* have an active Pledge in the system.  

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**BENEFIT:** Allows you to easily see which contributors have active pledges in the system and which do not



### The 2010 upgrade brings you...

#### Better & more flexible reporting capabilities (continued...)

- We've enhanced the Contributor Output Configurator to allow you to add your church's logo to contribution statements.  
**BENEFIT:** Adds a nice professional touch to your statements – it's also been reported that during an audit the IRS prefers to see the church's logo on the statement for credibility reasons
- We've added a new "Contributions Summary – Pledged vs Non-Pledged" report to the Contributions Utility Report Configurator. This report displays and compares total contributions given during a specified date range that are associated with a pledge and those that are not.  
**BENEFIT:** Allows you to easily see which contributions have come from contributors that have made a pledge – versus contributions that have come from non-pledging contributors. Previously this information was not able to be generated and presented in a single report.
- We've added more options when displaying pledge status information on contribution statements and pledge statements by allowing you to choose exactly which pledge fields (i.e. "Amount Ahead/Behind", "Total Payments Remaining", etc.) are to be shown (or hidden) on the statement.  
**BENEFIT:** Allows you to decide exactly what data should be shown to your people – eliminating confusion and improving clarity
- We've enhanced the "Contributors with No Contributions" report from the Contributions Utility Report Configurator by adding historical contribution information for each contributor and membership status info on the report.  
**BENEFIT:** Gives you important insight and history on these contributors in a single concise report
- We've enhanced the Roll Call Report Configurator by having it remember the settings last used.  
**BENEFIT:** Eliminates the need for you to remember what options you last used – thus eliminating the frustration and wasted paper caused by incorrect settings
- We've enhanced the Meeting Roll Call Report to provide optional spaces to write in Visitor names and Manual Count totals.  
**BENEFIT:** Provides a convenient way to have leaders and teachers capture the names of guests as well as record the "head count" and other statistical data figures
- We've enhanced the Connection Detail Report and the Connections Report Configurator to allow you the option of displaying Connection Start and End Times.  
**BENEFIT:** Provides a more accurate and useful report

### The 2010 upgrade brings you...

#### "Windows 7" Compatibility

- We've ensured that Church Helpmate 2010 will be fully compatible with the new "Windows 7" version of Microsoft Windows. Of course it still works great with older versions of Windows all the way back to Win98!  
**BENEFIT:** Provides assurance that you won't run into any surprises when purchasing new computers loaded with Windows 7 or when upgrading existing computers to this operating system