SB Solutions Version Log-2012/2013

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Any assistance required in adding new fields is included for clients with annual support, contact us at BAACsupport@comcast.net or call us at 800-457-9326 for this assistance.

Version/Date	Change Description	New Fields
4/22/2103	Added new ability to use the Bill for Services when selecting a payment type of invoice in Networking Events. Prior Versions required manually creating an invoice where as now it is created automatically. Also tied in the relationship to open/closed invoices when either receiving payments, deleting payments for deleting the entire invoice	
	Added New Bill For Services Button on General Tab of Contact Detail. Will auto create an invoice for billing of non dues services. Option to print invoice or receipt if paid	New Services table
	Added Command Buttons on the log on form to click and set the "Trusted Location" for either Access 2007 or Access 2010, once set, command buttons no longer appear.	TrustYes field in the organization table
11/30/12	Added 2 Reports on the View Paid Invoices Form, one for include partial payments, one for full payments only. The reports added now group the payments by Month for the request date range	
10/22/12	Added ability from Viewing Invoice Payments to View the invoice and set any invoice item related to a major event. This being in the event rather than using Major Events, an invoice was created. This income will then appear in the Event Net Calculation of Reports A	
10/9/12	Added new Insurance company / policy number tracking along with ability to record related actions for each policy	
	Modified Net Event Calculation Report in Reports A to allow selecting all past events. Prior to this, the option were for only current active events.	
10/2/12	Added Booth/Badge number on view participants for Major Events for easier entry if doing this after some/all are registered.	
	Modified Create Invoice on Client Add form to stop if Business or Individual Name was not entered	
	Added a check for a critical MS Access reference when opening the program. Program execution will halt if the references are missing for any reason or have changed physical location.	
	Modified the Client Growth/Retention report in reports A to now be based on Fiscal year set in the organization infor/setup. This has been asked for by several organizations as the report has gained popularity.	
	Added a View Deposit slip when viewing Registers for Grouped Deposits. This in the event the user forgets this before completing the deposit in "Make Deposits" form.	
	Added Capability to Pay Payroll Liabilities from any Register	
	Built in "Export" Command Buttons for most Report A-Membership Reports. This primarily due to Access 2007 and greater. Prior versions of Access allowed an Export from the preview reports screen which is no longer available in later versions. Next update will work on exports for the financial reports in Reports A.	
	Minor Improvements to the Prospect/Client Follow-up tracking database. User can now assign reps, next call date, etc. from the summary list.	

6/30/12	Modified Enter Bill to allow for a negative total that will not be logged to the register. This then allows entry of a bill that may have a total net credit such as a credit card bill where a refund issued exceeded other charges that need to be recorded.	
	Corrected change password routine, previous changes did not account for the effect on this process.	
	Re-arranged the Data Utilities Menu that put the “RESTORE NOW” button at the bottom and not next to “BACKUP NOW”. This helps to prevent accidentally Restoring older data if done before the Backup. Restore Now should only be done when directed by BAAC.	
5/23/12	Removed auto fill price for one when editing an invoice item	
4/30/12	Corrected Issue when adding a Non Member Individual	
4/24/12	Improvement to Net Event Attendee adds and Receipts	
4/9/12	Added New Field for entering credits for sales tax in the event a state has credit allowances, also added a note field to add when viewing sales tax liabilities to pay and record.	Non, used existing non used fields
	Modified Sales Tax Report when paying sales tax to not include the sales tax paid for Gross Sales. No issues with data, just a formula change on the report.	
	When printing checks, added the account information in section 2/3 of voucher checks, added capability to also include paychecks when printing checks in a batch.	
	Added a memo when auto billing “Repeat” invoices to alert the user that the invoice listed came from a completed invoice that is scheduled to repeat.	
	Corrected Issue with Auto Billing, the include date range of membership on the invoice option did not work, it included dates regardless of the setting	
3/28/12	Corrected View Payments for Major Event Billing Statement. In the unlikely event 2 payments for the same amount from the same person , same payment type and on the same day was received, it would only show one, not both.	
	Hidden form was appearing when closing a Network Event	
3/9/12	Correct General Journal Entry when moving from an expense account to an income account, it applied negatives for both credits and debits in the P & L report.	
3/4/12	Corrected Issue of Copy Major Event, needed to modify this procedure as a result of linking Calendar of Events with Major Events	
2/27/12	Corrected make deposits when one or more where checked for deposit, and then one was voided. This caused the deposit to not be properly grouped in the related register.	
	Fixed Event Eval Summary Total Outstanding Calculation	
2/15/12	New Reports/Exports on Closed Invoices form. Improved Budget/Actual Monthly Forms/Reports/Export	
2/14/12	Added new report All Payment History for Members only	
	1099 Prompt to view summary or detail was not updated.	
2/9/12	Added total count numbers for open/paid invoice reports	
	Added another 1099 Report showing the detail of the source for the amounts.	
	Improved the 1099 Reporting by adding a 1009 checkbox to Chart of Accounts to augment the Contact 1099 Required. This will allow the user to only denote certain accounts as applying to the 1099.	
1/17/12	Added a new “View Less Detail” for Calendar of Events. Added an Expanded Memo field for Invoice Items.	

1/5/12	Added New 1099 Report, contact now has a checkbox if they should receive a 1099, report then displays a sum of all monies paid by date range.	
1/4/12	Added Major Event Summary form to view a snapshot of all Events	3 new fields in tblActivities
	Added Major Event Evaluation Templates and Feedback Recording. Now ask your participants how you did so you can constantly improve your performance	2 new tables
	Added Integration of Major Events to Calendar of Events, now easily update your calendar from the event detail page.	
	Resolved the issue with Auto Billing for Other Annual Fees. The issue being when the member was an individual with Billing to Others being a business, the amount was not being added to the correct contact. This had no impact with regular auto dues invoicing.	
	Added a new error check with Auto Billing to include possible setup errors for Pay Plan Members (more than 1/yr) for Annuity Billing	
	Modified Main Menu to better serve the user with most used options	