Spiritual Solutions Version Log-2011/2012

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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
4/24/12	Improvement to Net Event Attendee adds and Receipts	
4/9/12	Program would not delete a logged offering from the Make Deposits window, this has now been corrected.	
	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.	
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	
2/28/12	With the Directory now being a custom module, added capability to set the family contacts to visible yes/no in the directory and to set the sort order for member family/contacts.	Dir yes/no Dir Sort Order
2/27/12	For Publishing the Directory in Reports B, added all contacts for each member with relationship and email address. Made the Directory a Custom Module for Clients with Support	
	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.	
2/21/12	Added Capability for Program Setup to set the format of Individual contacts names to either First and Last or Last, First.	
	Fixed Event Eval Summary Total Outstanding Calculation	
2/16/12	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	Auto Invoicing did not work for Direct Deposit contacts, be they members or not. This has now been corrected.	
	Many improvements to the Log Pledges Routine that include a new progress field, along with a link to both create an invoice to allow payment receipt and view an already created invoice to continually receive future payments.	New Field in tblPledges
	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 Evaluation Templates and Feedback Recording. Now ask your participants how you did so you can constantly improve your performance	2 new tables
	Added Major Event Summary form to view a snapshot of all Events	3 new fields in tblActivities
	Added Integration of Major Events to Calendar of Events, now easily update your calendar from the event detail page.	
11/04/11	2 new Reports, Reports A-Deposits by Payment Type and Date Range. Reports B-Invoices Past Due >30 days	
10/10/11	Modified Reports to view a net negative deposit in the rare occasion where a refund is given for a credit card transaction that results in a total net negative on credit card receipts for the day. Also needed to modify reconcile actions to view any net negative deposits.	
9/6/11	Modified Copy Major Event to carry over Zero values for net income and expense, these values should not be copied for the next event.	
	Modified View Splits for a Bill Payment, incorrectly showed Major Event if applicable for the entire bill, Major Event if applicable is assigned to the Bill Item.	
8/8/11	Modified Prospect/Member follow-up application so that when running prospect or member follow-up reports by date range that you have an option to either show only the logged notes for the requested date range OR all notes for that contact last contacted in the requested date range.	
	Added Payment Type of PayPal, goes to Make Deposits form since users with PayPal accounts can download multiple payments at once for grouping.	
	Improved Voiding a Deposit from the Make Deposits form for Major Events. There was an issue when multiple payments were made for the same event/payee.	
	Added Contact Type to communication logs, user can now indicate whether the contact made was phone, email, visit or any type the user desires.	

8/8/11	In Reports A, Added new Invoice Paid reports, current report only shows paid in full, new report includes partial payments and options for by date, by name or by account	
	Added new capability to Backup and Restore Data that will alert the user if the program is in use. If the program is in use the backup appears to have been successful but in fact the backup never occurs if the data file is in use.	
	Corrected Void credit card transaction in the register, it was not updating the invoice item paid amount which in turn would result in an error when receiving the payment later.	
	Added a new change log record anytime a new contact is added or an existing non member is updated to member status.	
	No longer allow editing a prospect/member follow up record if the contact has an e-Chamber ID. These records must be updated in e-Chamber and will then update the prospect/member follow up database	
	Modified Member/Prospect Follow up report for calls made with notes by date range. Now shows all notes and eliminated a false record when a Prospect ID not in e-Chamber matched an e-Chamber existing ID.	
6/15/11	Add missing merchandise sale modules, could not receive the payment.	
	Copy Budget process to Reports A, Finance Reports, allows running these reports with P/L	
	Add Paid Date when paying liabilities	
	Copy chart of account reports to Reports A, Finance Reports	
	Link to Paycheck Detail from Income Register	
5/26/11	Prepared the program for new Social Networking Links for Facebook, Twitter, LinkedIn and Blog url's. Planned directory listing programming scheduled for Mid June 2011. User will have the ability to turn off this link should it be desired to apply a fee to members to post. The planned programming will have an icon for each to the right of the "Click Here for Website"	8 new fields for the 4 url's
	Added totals for Payroll Liabilities on the Payroll summary report by date range.	
	Corrected the contact person for members by billing address to be the Billing Attn. It was the primary that is not correct for billing address labels.	
5/16/11	Correct double listings on some financial reports when Major Event Billings were paid by Credit Card	
	Adjusted Auto Billing for Monthly Payment Plan Members Pledges when Anniversary Date fell on the $29^{th}/30^{th}/31^{st}$. This caused a problem when Feb billings cam due.	
5/9/11	Add new form to view Referral Sources from Contact Detail Sponsor/Honor Tab, also provides reports and exports for a single selected source or all source.	

5/3/11	For a general search it now also looks at phone and fax number	
	Corrected report for members not attending network events, if the business they represented was not in the database, it assumed they did not attend which is incorrect.	
	Added Maintain Member Interests to the Administration Menu.	
	On add new business, if no primary name was entered it would create an empty individual record, this has been corrected.	
4/27/11	Added an Activity Report on the Financial History tab that provides a snapshot report of all the records on the History tab.	
	Modified the “Set Billing to Mailing” function on Contact detail, it was not putting a dash after the area code for phone/fax.	
	Added an Alert message when Canceling a membership or setting Active or Member Checkboxes to off, the alert provides a message IF any contact is assigned to a group, board or committee and to remove if required.	
	Reset To Pay checkboxes for payroll liabilities if in fact they were not paid when opening “Pay Liabilities”.	
3/18/11	Due to a modification in December to improve payroll reporting, logging of detail by account for hourly personnel was omitted. This has now been corrected. Any payroll created since 12/1/10 will need to be updated, contact BAAC, Inc. for assistance.	
	Inventory Improvements. Modified Inv detail Sale Item box for Account Selection and Include Tax rounding calculation. Inventory Location Selection was not the correct field. Keyword fields on Master list now selection boxes. Fixed Inventory Audit Report.	
	Equipment List Improvements. Modified Equipment Audit Report to include equipment with no keyword assignments. Made Keyword selectable on Equipment Master List.	
	Master Contact List, Corrected default contact type for Individuals for new quick entry records, was business which made the user also select this as individual.	

2/18/11	Added a new function in Reports B, Contacts with emails to include viewing new emails and changed emails. When opening the email change form, the records are sorted by date modified or added in descending order. The ability then exists to filter this form by date range, members only and/or newsletter only. Export is then available. The intent is to provide information on new/modified email addresses for easier update of email marketing programs like constant contact.	
	Added Scroll bars to event descriptions in both calendar of events and member happenings	
	Change date for an archived network event did not work and is now operational.	
	Modified Reports A, Financial Reports, Overdue Invoices All and Overdue Invoices Member Renewals. The detail was not taking into account sales tax amounts in the total billed amount.	
2/1/11	Add 2 reports for General Journal Entries, Debit Accounts by Date Range and Credit Accounts by Date Range	
01/22/11	Corrected Deposits by Date Range report IF partial payments included both credit card and checks/cash.	
01/17/11	Modified Contribution Statement to include up to 5 different income accounts, not just a general offering account. Modified the report to group the details for the offering by these accounts	
	Modified Source for Member Contribution Statements to use only first 5 digits for ZIP code, differences with Grouping families would produce duplicate contributions	
01/02/11	Improved Account Totals by Date by indicating for Journal Entries what account it came from or went to.	
	Fixed issue of Journal entries appearing in the Debits by Date Range Report	
	Created a new Separate Report in Reports A, Contact Reports named “Member Contribution Statements”	