DonorPerfect Online
2012 Release Notes

Version 2012.008 Release Notes (August 20, 2012)

Improvements

- In the User Settings Parameters screen, under **Favorite Selection Filter Fields**, the table is now listed in parentheses after the field name, so that users can distinguish between fields from different tables that have the same name.

- Dashboard reports now obey the Security Filters on the User Security Settings screen. If a user's Security Filter settings would prevent them from viewing a record, that record will not be included in that user's dashboard reports.

- Updated the calendar icons throughout the application.

- Notifications generated as part of Consolidated Receipting 2.0 now obey the anonymous donor/gift flags.

- The Send Email function of the Main Entry Screen no longer freezes when an apostrophe is present in the Email Subject field.

- NCOA Updating and CASS Certification are now being handled in-house by SofterWare, Inc.

- On the Mail Merge screen, the Update Contact Manager option now has a field that allows the user to specify the Completed Date for the contact record generated as part of the mail merge.

Corrections

- Entering an inventory management item description containing apostrophes no longer triggers an error message.

- Eliminated an invalid email address alert for Safari browser users on Macintosh computers.

- Users are no longer prompted for their User ID and Password when connecting to WebLink using the **WebLink** option from the **App Links** menu.

- The Nightly Database Sync for the Constant Contact Email module no longer fails to run for some systems.

- Gifts no longer disappear from Batch Entry 2.0 batches during Save and Close on some systems.

- Batch Entry 2.0 posts no longer time out on some systems.

- Eliminated timeout errors when generating receipts on some systems.

- Restored the ability to export to Excel from the Summary List, Linear List, Info Sheet, History List, Linear List with Addresses, and Relationships/Links List on some systems.

- Eliminated an error message when the Recalculate Gift Totals function is used while a selection filter is entered into the **Filter for All System-defined Calculated Fields** field on the Calculated Fields Parameters screen.

- Displaying gift records that have been imported with the **Gift Date** set to NULL no longer triggers an error message.

- The totals on the GL Code Analysis report now match the totals on the drill-down views for each code on all systems.

Screen Designer Beta

Improvements

- The list of tributes associated with a gift now appears in a separate **Tribute Details** section on the Gift Entry screen.

- The ZIP Code Lookup feature now operates normally under the new Screen Designer.

- Required Fields are now clearly marked using an asterisk.

- System backups created using the previous version of Screen Designer can be restored using the new version of Screen Designer.

- In a multi-select field, selected codes are displayed first in alphabetical order, followed by the unselected codes in alphabetical order.

- Users can now save default values for currency fields.

- SmartActions no longer contain values for date/time stamps. Date/time values are now determined when the SmartAction is triggered.

Corrections

- Restored popup warning when a user attempts to use the Schedule Payment function and the Frequency is not set to "Unusual Payments."

- Corrected broken **Pledge Total** column on the "Link Contact to Gift/Pledge" screen.

- Restored the lower **Save** button on all of the data entry screens.

- The Donor ID number now appears correctly next to the constituent's last name in the Bio screen.

- The default value settings for the Other Addresses screen are now being saved properly.

- The **Receipting Preference** and **Receipt Delivery** fields have been restored to the Main Entry Screen.

- When a user clicks on the **Insta-Charge** link in the Gift Entry screen, the gift amount is now copied to the Amount field on the Insta-Charge screen.

- Clicking the **Save** button on the Other Address Entry screen no longer triggers an error message.

- The **Send Email** link at the top of the main entry screen works properly again.

- New addresses are no longer mislabeled as old addresses when the **Track address change history** parameter on the Entry Screen Parameters screen is checked.

- The **Receipting Preference** on the Gift Entry Screen is now saved properly.

- Checking the **Select** column header on the Screen Designer Fields screen no longer checks options outside the **Select** column.

- Clicking on a **Due Date** link in the **Open Contacts** section of the Dashboard now takes you to the correct record.

- Saving a contact record no longer generates an error on some systems.

- Data entered into user-defined fields on the Address screen is now saved properly.

- Restored function to the navigation arrow buttons at the top of the Main Entry Screen.

- The fields for the Constant Contact Email module now appear on the Main Entry Screen again.

- The Email Information section for the Constant Contact Email module now appears on the Main Entry Screen again.

- SmartAction email messages no longer add extra zeroes to gift amounts.

- Solicitation Codes are now validated correctly when the **Validate Solicitation Code** parameter is checked.

- Eliminated error message when recalculating gift totals.

- Accessing Screen Designer no longer triggers an error message for some systems.

- NOZA customers can once again access NOZA from the Main Entry Screen.

- Restored the Optional Line field to the Main Entry Screen on all systems.

- Fields that were set to display on both the Gift and Pledge entry screens in the old version of Screen Designer now appear on both screens under the new Screen Designer.

- The Textbox Length setting from the previous version of Screen Designer has now been mapped to the Display Width setting in the new Screen Designer.

- Restored access to WeathEngine from the Main Entry Screen.

- The default values for the Main Entry Screen and the Gift Entry Screen can now be saved properly.

- ZIP code values are now passed properly to WealthEngine

Version 2012.007 Release Notes (July 23, 2012)

New Features

- A new **Notifications** tab has been added to the Receipting 2.0 screen. This tab allows you to export mail merge data files for donors who have made donations to one or more tributes. The data files can then be used to generate notification letters.

Improvements

- In the View Giving History and Summary screen, the labels in the **Totals** area have been updated to distinguish between calendar year totals and fiscal year totals.

- The confirmation message when deleting a gift from the Gift List screen has been enhanced to include the date and amount of the gift.

- The full name of the user now appears at the top of the screen under the **Logout** link, instead of just the User ID.

- The outdated link to the DPO User Manual PDF has been removed from the Downloads screen in the Help menu. The contents of the PDF manual are now stored in the SofterWare Knowledgebase.

- The "Click here for detailed End of Year Tax Merge Letter instructions" link on the Mail Merge Templates screen has been updated to point to the relevant article in the SofterWare Knowledgebase.

Corrections

- Importing a text file containing UNICODE characters no longer generates an error message.

- Creating NCOA fields on some systems no longer triggers error messages.

- Eliminated an extra Close button on the Auto-Calculation Filter pop-up screen.

- Restored the ability to add split gifts to some systems.

- Eliminated error message when clicking on the **No Code** link in the Sub-Solicitation and Sub-Solicitation Analysis reports.

- The Code Lookup and Description fields now display correctly on the Code Lookup screen for some systems.

- Decimal places now display correctly for currency/money fields in SmartAction popup messages.

- Donor IDs entered into the **Keyword** field on the Search Screen are no longer copied to the **Last Name/Org/ID #** field once the lookup button is clicked.

- The User Settings screen once again displays a "Please Enter a Valid Email Address" message when an invalid email address is entered.

- Attempting to send email from the Main Entry Screen using Outlook 20002/2007 no longer displays security warnings and additional Outlook message windows with incorrect information in the header fields.

- Creating a new moves management action from the Contact Entry screen no longer triggers an error message.

- Eliminated system error when attempting to export invalid records to CSV as part of the Import process.

- Running the printable version of the Gift Listing report no longer generates error messages.

- Eliminated error messages when generating email receipts on some systems.

- Eliminated extra Close buttons in numerous Help pop-up screens.

- Safari browser users are now able to enter email addresses in the Main Entry Screen without the "Please Enter Valid Email Address" warning going off every time.

- Financial reports now include orders correctly when the **Include Orders in Financial Reports** option is selected.

- The columns in the Daily Activity Log are now sorted correctly.

- Tribute amounts are once again filled in automatically in Batch Entry 2.0.

- Error messages are no longer generated when attempting to apply a refund to a gift on some systems.

- Resolved an issue that prevented the user name from appearing underneath the **Logout** link at the top of the screen.

- Eliminated error messages on some systems when deleting codes in Code Maintenance.

- **Hidden** settings in Batch 2.0 templates no longer fail to be saved on some systems.

- Accounting transactions now include the correct CLASS data.

- Drilling down on the Total Revenue column in the Solicitation Analysis report no longer triggers an error message on some systems.

- Running the Annual Statement Report while filtering on **Donor Type** and **State** no longer triggers an error message on some systems.

Version 2012.006 Release Notes (June 18, 2012)

Improvements

- The navigation controls in the Main Entry Screen now obey the user security filters. If a user attempts to navigate to a record that is prohibited by the user security filters, the record will be skipped.

- When a user adds a compound filter to a specific filter folder and then edits the filter later on, that specific filter folder will still be selected when the edit screen appears.

- The Info Sheet and History List reports can now filter by gift dates when the **Use Gift Filter** report option is selected. Simply select **Use Gift Filter** and then create a selection filter that selects the desired range of **Gift Date** values.

- User-defined numeric fields now display and update correctly on all systems.

- The disused **Update Recent Mailings with Mail Code** option has been removed from the Mail Merge screen.

Corrections

- Recently Viewed Donor Records on the Search screen are now properly left-justified.

- If an alternate address is selected when creating a soft credit, the alternate address will now be included in the soft credit record.

- Running the Solicitation Analysis Report with zero-dollar segments included while filtering on the solicitation code no longer produces an error message.

- Running the Sub-Solicitation Analysis Report with zero-dollar segments included while filtering on the solicitation code no longer produces an error message.

- Eliminated error message when combining duplicate records on some systems.

- Running the Counter Report on the **Main/Bio CREATED_BY** field with a donor-based filter no longer triggers an error message.

- Generating the printable version of the GL Code Analysis report no longer triggers an error message on some systems.

- The Count Records report no longer incorrectly displays the Use Donor Filter/Use Gift Filter report option on some systems.

- Removing duplicate records using the Advanced Combine option no longer generates an error message on some systems.

- Corrected the formatting of email template date fields on some systems.

- Changes made to the Import module validation settings are now put into effect correctly on all systems when an import is re-validated.

- Resolved an issue that caused records imported from a merge purge data file to have fields with null values on some systems.

- Eliminated error message on some systems when searching for constituent records using the **Donor ID** field on the Search screen.

Version 2012.005 Release Notes (May 21, 2012)

Improvements

- Performance has been improved for the Constant Contact Email module's Nightly Database Sync.

- The options in the Export Templates Add/Edit screen have been redesigned for better clarity.

- The Info Sheet report now contains options to include additional information such as gifts and pledges, contacts, links and other addresses.

- The History Listing report now allows users to select whether they want the selection filter to be applied against donor records (Donor Filter) or gift records (Gift Filter).

- The Main Entry Screen now allows users to navigate to the previous and next record without returning to the Search screen.

- The Pledge Listing Report now accounts for open-ended pledges when totaling payments and balances.

- Users can now create a SmartAction that creates a Contact or Other Info record whenever another SmartAction deletes a gift or pledge record.

- The Accounting Interface **Filename** parameter has been renamed **Export File Name**.

- The **View Chart of Accounts** link on the Accounting Interface Parameters screen has been renamed **View Chart of Accounts (GL Codes)**.

- The following changes have been made to the Calculated Fields Parameters screen:

  - A popup help screen has been added to the **Include Gifts in Calculated Fields** parameter, saying that **Linked Gifts include Soft Credits, Notifications, Matching Gifts**.

  - A popup help screen has been added to the Auto-calculation Filter heading, saying that **The Autocalc fields provide the total amount of each donor's**

gift transactions as qualified by the calculated fields parameters and filters.

- ◉ The **Filter for all Calculated Fields** field has been renamed **Filter for all System-defined Calculated Fields**.

- The **Received** calculation in the Pledge Listing Report is now calculated as the sum of all payments for a pledge, rather than the total minus the balance and write-off amount. This calculation works properly for open-ended pledges.

- The Info Sheet Report now allows users to add up to 9 fields in the **Contacts** and **Addresses** categories. Each category will be listed as its own grid of fields in the report.

Corrections

- Eliminated error when importing contacts on some systems.

- User-defined fields are now being backed up and restored properly on all systems.

- The defunct QuickBooks Auto-Transfer Install Program has been removed from the Downloads screen.

- Calculated fields now correctly treat the first gift entered for a record as the initial gift, and its date becomes the Initial Date for that record. If a second record is added that same day, the second record becomes the Most Recent record, and its date becomes the Last Contribution Date. Calculated fields no longer treat both records as the Initial Date record.

- The **Associated Address** field is now copied over properly from the pledge record to the pledge payment record following EFT processing.

- Eliminated an issue that prevented some systems from being able to create dynamic lists in the Constant Contact Email module.

- Corrected Constant Contact Email module sync issues on some systems.

- Resolved issues that prevented the Constant Contact Email module's Nightly Database Sync from running overnight on some systems.

- Eliminated error message during manual sync of the Constant Contact Email module on some systems.

- Access the List Management screen in the Constant Contact Email module no longer triggers an error on some systems.

- Solved a problem that prevented dynamic lists from being populated with constituents on some systems.

- Resolved an issue that prevented users from creating manual lists in the Contstant Contact Email module on some systems.

- Increased the timeout threshold in Inventory Management to prevent timeouts while downloading orders.

- The **Solicitation Code** field now appears on the Code Properties screen when creating a new Sub-Solicitation Code.

- Eliminated an issue that caused users on some systems to see a Security Certificate warning after login.

- Running the GL Code Analysis Report no longer displays an error message when both user- and gift-level security filters are in use.

- Also eliminated a separate ODBC Driver error when running the GL Code Analysis Report.

- Accounting data can now be downloaded from Receipting without generating an error message.

- Running a Direct Mail Plan no longer triggers an error message on some systems.

- Applying a split from a Split Gift to a pledge payment now updates the pledge balance properly.

- Running the Gift Listing Report no longer displays an error message when security filters are in use.

- Eliminated error message when performing Keyword searches from the Search screen on some systems.

Version 2012.004 Release Notes (April 30, 2012)

Improvements

- A User Daily Activity Report has been added to the User Security Settings screen. This report lists the number of constituent and gift records added and modified on the current day. The report can be viewed within the normal DonorPerfect Online UI, or generated in a print-friendly format that is devoid of menus, etc. The User Daily Activity Report can also be set to automatically display at logout.

- The **Web Accessibility** option in the User Settings Parameters screen has been renamed to **High Visibility Navigation Bar**. If this option is checked, the text in the navigation bar will remain black when highlighted, as an aid to the visually impaired.

- Each sub-solicitation code can now be associated with a solicitation code in Code Maintenance. If this has been done, selecting the sub-solicitation code in the Gift Entry screen will automatically select the solicitation code as well.

- Improvements have been made to the **Export to File** listing. Performance with the **Include Flags in Mail Merge** option selected is dramatically improved.

- The AFP Survey prompt no longer appears after users log into DonorPerfect Online.

- Improvements have been made to the Solicitation Analysis and Sub-Solicitation Analysis reports:
  - The **Response #** column has been renamed **# of Gifts**.
  - The **Response %** column has been renamed **% of Gifts**.
  - A **# of Responses** column has been added to the right of **# Mailing**. It lists the number of donors who responded to the solicitation or sub-solicitation.
  - A **% of Responses** column has been added to the right of **# of Responses**. It lists the percentage of constituents who donated a gift based on the solicitation, out of the total number of constituents who received the solicitation.
  - Formatting of the reports has been improved.
  - The **Total Income to Goal** and **% Total Income to Goal** columns are now listed as **$** and **%** under the heading **Variance (Total Income to Goal)**.
- If the NOZA features are not enabled for a user, the **Access NOZA** link in the Main Entry Screen will not be displayed.
- The following reports have received performance optimizations:
  - Gift Listing
  - Annual Statement
  - Solicitation Analysis
  - Sub-Solicitation Analysis
  - GL Analysis
  - Statistical Tabulation
  - Daily Log
  - Cross Tabulation Report
  - Linked Gift Report
  - Pledge Listing
- The Search screen now displays an **Add New Gift** link next to each constituent in the Search Results section of the screen. Clicking this link takes the user directly to the Gift Entry screen for that constituent.
- An **Add Gift** link has been added to the Main Entry Screen. Clicking this link takes the user directly to the Gift Entry screen for that constituent.
- The Search screen now ignores accent marks within a constituent's name, resulting in improved search results.

Corrections

- Eliminated a WealthEngine error message when the # symbol exists in an address field.

- Keyword search now searches alternate addresses correctly.

- Users are no longer able to exceed the storage limit on hosted file storage.

- The Gift Range Report now displays pledge data correctly when the **Include Pledges in Calculated Fields** parameter is enabled.

- The **Add to Batch Templates** option in Screen Designer is no longer displayed when the **Other**, **Contact** or **Address** screens are selected.

- New entries added to coded fields are no longer added to the wrong field.

- The **Preview** function in Screen Designer no longer ignores recent changes to screens.

- The **Send Email** link in the Main Entry Screen now launches Outlook Express correctly.

- The alert message for tributes that exceed the Gift amount now displays properly under Internet Explorer 8.

- The Gift Entry screen no longer displays a comma instead of the decimal point in the **Amount** field.

- The **Amount** field in the Gift Entry screen now displays commas correctly.

- The Main Entry Screen tabs now render correctly in Internet Explorer 8.

- The pop-up calendar now displays next to the date picker icon on the Payment screen in Event Management.

- Eliminated error message when clicking on the Split Gift button on the Gift Entry screen.

- Saving a gift no longer triggers an error message on some systems.

- Eliminated error message on the Gift List screen on some systems.

- Using the Instant Merge function on the Gift Entry screen no longer triggers an error message.

- When the **Link Gift** function at the top of the Gift Entry screen is used, the **Gift Narrative** parameter on the Entry Screen Parameters screen will determine whether information should be copied from the **Narrative** field in the gift record to the **Memo** field in the link record.

- Tabs in the Main Entry Screen no longer remain boldfaced if the records they contain are all deleted.

- When an Other Info record is edited and saved, the information in the **Birthdate** field is now retained.

- The **Plan Action** field in the Contacts Entry screen now displays the correct list of actions.

- When a user runs a financial report, then uses the **Back** button in their browser, the Report Options screen now displays the settings that were selected when the last report was run, instead of the default settings.

- The date range is now displayed correctly for international users of the Lapsed Member membership report.

- When the Counter Report is exported to a file using the Export to CSV function, the selection filter for the report will be applied to the contents of the export file. This make the contents of the export data file identical to the contents of the report.

- The **Receipt Delivery Pref.** and **Receipting Preference** fields now appear on the Main Entry Screen for all systems.

- Flag data is now saved properly for all systems.

- On all systems, the "View Narrative" button on the Main Entry Screen now correctly displays the contents of the Narrative field in the popup screen that appears, and allows you to append text to the narrative.

- The dates in the **Narrative** field entries now use international date formats when the system is set up for international users.

- The date range is now displayed correctly for international users of the Linked Donor report.

- Clicking on the **Bio** tab in the Main Entry Screen no longer triggers an error message on some systems.

- Saving a new pledge no longer triggers an error message on some systems.

- The Moves Management Campaign Analysis and Campaign Comparison reports no longer fail to complete on some systems.

- The Solicitation Analysis report now displays results in the User Local Currency selected in User Security Settings.

- The headings of the Solicitation Analysis and Sub-Solicitation Analysis reports are now centered properly for Internet Explorer 8 users.

- Eliminated error message after Step 1 of Custom Report Writer on some systems.

- Clicking the **Set Selection Filter** option on the Custom Report Writer screen no longer takes users to the login screen on some systems.

- If the **All addresses set to receive specific mailing type(s) option** on the Mail Merge screen is selected, and the system has only one mailing type defined, the mailing type will remain selectable instead of being disabled.

- The **Send One Mailing Per Household** option on the Mail Merge screen is behaving correctly for all systems.

- The Transaction Listing report can now be sorted correctly using the values in the **Amount** column.

- Downloading accounting data from the Receipting screen no longer triggers an error when the **CLASS** field contains an apostrophe.

- The Export to File listing no longer sorts values in the **Amount** column in alphanumeric order (1, 10, 1100, 20) rather than numeric order.

- The **DPGIFT.RCPT_NUM** field is no longer incorrectly treated as a numeric field when building a selection filter (it is a varchar field).

- Eliminated error message when accessing the User Settings Parameters screen on some systems.

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DonorPerfect Mobile 2.2 Release Notes (April 17, 2012)

Improvements

- A **DPO Mobile App** option has been added to the **App Links** section of the User Security Settings screen. This setting determines whether the user can log into DPO Mobile using their DPO User ID and password.

- The Donor Search screen now features a **City/State** search field in addition to the donor's name field to make searching clearer.

- If a user does not have access privileges for the Gifts screen in DonorPerfect Online, they will not be able to access the Gifts screen in DonorPerfect Mobile either.

- If a user does not have access privileges for the Contacts screen in DonorPerfect Online, they will not be able to access the View Contacts screen in DonorPerfect Mobile either.

- If a user does not have access privileges to edit contacts in DonorPerfect Online, they will not be able to edit contact details in DonorPerfect Mobile.

- If the **Show Descriptions** option for contact activity codes is disabled in DonorPerfect Online, code descriptions will display in the selection list in DonorPerfect Mobile, but the code will display in the contact itself.

- The Upcoming Contacts report now displays a message if no upcoming contacts are assigned to the current user.

- The Loading indicator now appears when the Contact List report is run.

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Version 2012.003 Release Notes (March 19, 2012)

New Features

- The **YYYY-MM-DD** date format has been added to the system ("2012-03-14"). It can be selected as the **System Date Format** in the User Settings Parameters screen. You can also use this date format in Import 2.0 data files.

Improvements

- A **DPO Mobile App** option has been added to the **App Links** section of the User Security Settings screen. This setting determines whether the user can log into DPO Mobile using their DPO User ID and password.

- A new **Export all data files as ASCII** parameter has been added to the General Parameters screen. If enabled, this parameter causes exported data files to be in **ASCII** format instead of **UTF-8**.

- A new **Default Import Date Format** setting has been added to the User Settings Parameters screen. This sets the default date format for records imported using Import 2.0. This setting may be different from the **System Date Format** if desired.

- A new help icon has been added to the Import Options screen of Import 2.0. Located next to the **Select Import File Date Format** list, it provides guidance on selecting the default import date format in the User Settings Parameters screen.

- A new **Web Accessibility** parameter has been added to the User Settings Parameters screen. When enabled, this setting causes the text in the navigation bar menus to remain black when highlighted, to aid the visually impaired.

Corrections

- Corrected the **Documentation** link on the Events screen of the Event Management module. The link now opens the help topic inside the full WebHelp environment instead of as a standalone file.

- Corrected the **Documentation** link on the Receipt Options screen for Receipting 2.0. The link now opens the help topic inside the full WebHelp environment instead of as a standalone file.

- Switching from "All" rows per page back to 10 rows per page on the Create Invites tab of the Event Management module no longer triggers an error message.

- Eliminated an issue that prevented records from being updated following a full sync of the Constant Contact Email module.

- When a Security Filter has been deleted from the system, a warning message now appears on the Search screen to notify users.

- Running the **Export to File** listing with the **Gift/Pledge Summary** export type no longer triggers an error message on some systems.

- The **State** field in the Main Entry Screen now displays Canadian provinces where appropriate for all systems.

- The Info Sheet report now displays solicitation code descriptions on all systems.

- Membership information is now updated correctly after a batch entry is posted using Batch Entry 2.0.

- The count on the Email Receipts preview screen is no longer incorrect for Mac users.

- The Email Templates screen no longer inserts erroneous text into email templates for Mac users.

- Eliminated error message when users drill down into the Recency By Frequency report while the currency symbol on the General Parameters screen is set to **$**.

Version 2012.002 Release Notes (February 20, 2012)

New Features

- A new **Send One Mailing Per Household** option has been added to the Mail Merge screen. When this option is selected, DonorPerfect searches for constituent records which have the same address, and sends one letter to all of the constituents at that address based on the most recently updated record.

- A new **Default for Keyword Search** parameter has been added to the User Settings screen. This parameter selects whether the **Keyword** field appears at the top or bottom of the screen, or not at all.

Improvements

- Financial report settings are now retained when a user runs a report and then clicks their browser's Back button.

- Improved the formatting of the Email Templates screen.

- In the Gift Entry screen, the **Description** field for Tributes has been removed, and a grid for tributes has been added that allows for multiple tributes with multiple descriptions.

- Users can now enter the Donor ID into the **Keyword** field on the Search screen.

- The **Keyword** field on the Search screen now performs a "contains" search, instead of a "begins with" search.

- Added a link to the online AFP Survey that displays in a pop-up screen when users log into DPO.

Corrections

- Users who do not have access privileges for Global Batch Update are no longer able to view all transactions or use the Update Batch button.

- When a selection filter is selected on the Search screen, it will now go into effect on the initial Lookup action.

- The linked name for a tribute notification no longer appears with an "11" appended onto the end.

- When the **All addresses set to receive specific mailing type(s)** option on the Mail Merge screen is not selected, the mailing type sub-options are disabled.

- The word **Mailmerge** has been corrected to read **Mail Merge** on the Export Templates screen.

- Eliminated duplicate fields that appeared on Step 5 of the Custom Report Writer Wizard for some customers.

- Selection filters for Gift/Pledge custom reports are now applied directly to the Gift/Pledge records, instead of to Main records.

- The Gift Aid report now includes a page break for 2012.

- Greek characters now display correctly on systems with UNICODE support.

- Receipt delivery fields are now updated properly when using Batch 2.0.

- Eliminated error when accessing the Manage Responses tab of the Events Management module on some systems.

- Batch Entry 2.0 no longer fails to save the Campaign codes for some gifts.

Version 2012.001 Release Notes (January 23, 2012)

New Features

- A new **Keyword** field has been added to the Search screen. The Search function will now compare the terms entered into this field against the contents of the **First Name**, **Last Name**, **Middle Name**, **Spouse** and **Optional Line** fields when searching for constituent records. You can use the **Keyword** field in conjunction with any of the existing fields on the Search screen.

Improvements

- The message at the top of the Receipting 1.0 screen has been updated to provide more information on how to enable Receipting 2.0.

- The Custom Report Writer can now display and export the descriptions for coded fields.

- Global Update now has the ability to clear selections in multi-select fields.

Corrections

- Custom Report Writer users can now click on the **Back** button to revisit previous screens without losing their field selections in the later screens.

- **Constant Contact Email Status** and **Opt Out Reason** settings are no longer deleted from the Main Entry Screen after the **Save** button is clicked.

- Resolved an issue that caused the **City** field to be populated with an incorrect city when entering a ZIP code on the Add Donor/Gift screen.

- Configuring default settings for a different user account no longer changes the default settings for the current user account.

- Selecting a donor name in Batch Entry 2.0 no longer causes the screen to go blank on some systems.

- The formatting for QuickBooks export files has been reset to ANSI instead of UTF-8, avoiding import errors for some versions of QuickBooks.

- The link between a pledge and an event is no longer deleted when the pledge is edited.

- Eliminated error message when adding a new field value to a "Create Transactions" SmartAction.

- Eliminated error message when the **Build New Filter** button on the Filters screen is clicked.

- Duplicate gifts are no longer created when the **Validate Solicitation Code** parameter on the Entry Screen Parameters screen is checked.

- The **Total Donors** label on the Amount drill-down screen of the Income Analysis with Gift Splits report has been changed to **Total Gifts**.

- The **Name** column on the Transaction Listing report has been renamed to **Primary Name**.