

Major Release #	Update #	Item #	Date Of Change	Type	Doc.	BEC	Major Area	Minor Area	Change Definition	Request From
Key: Doc = * indicates the change affects documentation; BEC = * indicates a backend change										
5	0	1	12/22/06	Problem Correction			Screen	Donors	Filter/Unacknowledged Donations: The donor's "has unacknowledged donations" variable was not being set correctly so this filter was not working correctly. Workaround: Do ScanDb prior to using Filter/Unacknowledged Donations.	
5	0	2	12/22/06	Problem Correction			Screen	Donors	Estimated acknowledgement letter: This was not working for all combinations.	
5	0	3	12/22/06	Problem Correction			Screen	Donors	In-kind donations amount was not being set to \$0 under some circumstances.	
5	0	4	12/28/06	Problem Correction			Screen	Mortgage Payments	If a homeowner makes a partial payment early in the month and then later in the month makes another partial payment, when the Date Due field is clicked the initial allocation is incorrect (however, when the total amount of the payment is entered, the allocation corrects itself).	
5	0	5	12/28/06	Problem Correction			Screen	Initialize Database	There is a minor problem in annual calculations done in Keystone 5.0. The new Donor History calculation routine, which is automatically executed when the date changes to a new year, closes the Initialize Database screen. Calculations that are performed during the initialize database process display the names of the processes being performed on the Initialize Database screen. Since the Initialize Database screen is closed, this displays an error message for each of these processes. (Fixed 1/3/07)	
5	0	6	1/4/07	Problem Correction			Screen	Closing Fees	Clicking on Date Due and Enter created an error message.	
5	0	7	1/4/07	Problem Correction			Report	Development > Donations > InKind	This report was not showing Inkind donations where the Message field, used to define the inkind product or service, was blank.	
5	0	8	1/10/07	Style			Report	Affiliate Mortgage Summary	Affiliate signature placement was not working.	
5	0	9	1/18/07	Problem Correction			Report	Development > Groups > Development	This report was too wide and was overflowing to a second page.	
5	0	10	1/18/07	Problem Correction			Report	Development > Groups > Donations	This report was displaying a Reserved Error message.	
5	0	11	1/18/07	Problem Correction			Screen	Family Partners	If the closing fee Monthly Payment on the Family Partners tab of the Affiliate Setup Screen and/or the Administration tab of the Closing Fees screen is blank, it will create an error in the Payment Status field of the Family Partners screen.	
5	0	12	1/19/07	Style			Screen	Affiliate Setup	When browsing for the Help Files location, the title in the Title bar of the browsing window was Select The Keystone Templates Folder. (Changed to Select the Help Files folder)	
5	0	13	1/19/07	Style			Screen	Affiliate Setup	When "C:" is used as the drive location of the Help Files or Templates folder, an informational message is displayed that the folder will not be a shared folder and a copy must be on each computer.	
5	0	14	1/19/07	Problem Correction			Report	Finance > Escrow Management > Disbursements	If two identical payments (Payee, Category and Amount) were made for a homeowner on the same day, only one of these payments was showing up on the report.	
5	0	15	1/24/07	Problem Correction			Screen	Detail/Summarv > Detail Affiliate Setup	Clicking Cancel when browsing for the Help and Templates folder or the template files returned a blank as the path to the location. This has been modified to retain the original value.	
5	0	16	1/24/07	Problem Correction			Screen	Donors, Volunteers, and Covenant Partners	Attempting to open any of these forms when no contacts had been defined for the associated category would display a "No data" message and then close Keystone. This has been modified so that Keystone isn't closed.	
5	0	17	2/4/07	Problem Correction			Screen	Donors, Club Pledge Tab	If a homeowner address has not been assigned to a homeowner when the club pledge event date is entered, the address wasn't showing up on club pledges.	
5	0	18	2/4/07	Problem Correction			Screen	Assignment of Donations to Pledge	This Payment field could be set to an amount that would exceed pledge.	
5	0	19	2/7/07	Problem Correction			Screen	Escrow Analysis	New escrow payment option fields on Affiliate Plan tab could be set to blank which would create an export error. Modified so that blanks are automatically set to \$0.	
5	0	20	2/10/07	New Feature	*		Screen	Required Balance Detail and Escrow Affiliate Plan calculation screens	Hovering over a monthly disbursement will display the escrow payees that make up that disbursement.	
5	0	21	2/10/07	New Feature			General	Backend Database	Keystone has been modified so that when it is started it checks to see what the version of the backend data structure is and, if it is not current, to update the backend and change the version to the current version.	Comment: Deleted and moved to a serarate Upgrade Program
5	0	22	2/10/07	New Feature	*	*	Screen	Escrow Analysis Setup	Another tab has been added that allows the user to select all homeowners for initialization or just a few. This required adding a field to the backend database, which required that Keystone be modified to test the version of the backend database at startup and if it is not current, incrementally modify it. The set of "All Homeowners" depends on the value of the pull-down list Select Homeowners Including on the Escrow Analysis screen. If Select Homeowners Including is set to All Payees then all homeowners will be included on the Escrow Analysis Setup screen. If, for example, Select Homeowners Including is set to State Farm and there are only 20 Homeowners who have State Farm as a Payee, only these 20 will be listed in the selection list on the Escrow Analysis Setuo screen.	Nancy; Quad Cities, IN
5	0	23	2/10/07	Problem Correction			Screen	Escrow Analysis	The Affiliate Plan was incorrect when a cushion was used. The cushion was being doubled in the plan.	
5	0	24	2/10/07	New Feature	*		Screen	Escrow Analysis	When you double click on any of the options in the Affiliate Plan pane, an Escrow Affiliate Plan screen is displayed that shows the monthly payment, disbursements and balance that result form the plan. Both the Required Balance Detail and the Escrow Affiliate Plan calculation screens can be displayed at the same time.	

5	0	25	2/11/07 Problem Correction	Screen	Contacts	An error was produced when trying to add a new set of titles on the fly. (Fixed)	
5	0	26	2/17/07 Problem Correction	General	Compaction	The backend compaction routine was rewritten to reduce the possibilities of errors.	
5	0	27	2/18/07 New Feature	Report	Finance > Reports For Homeowners >Mortgage Payment History	A period selection option has been added to this report.	HFH Selma AL
5	0	28	2/19/07 New Feature	Screen	System Information	A button has been placed to the right of each location field. Clicking this button will take the user to the folder containing the item identified in this field.	Nancy
5	0	29	2/27/07 Problem Correction	Report	Family Services > Family Partnership > Overview	This report was wider than a page and was overflowing to a second page.	HFH of Elkhart County, IN
5	0	30	3/7/07 Problem Correction	General	Compaction	The backend compaction routine was modified to further reduce the possibilities of errors.	
5	0	31	3/9/07 Style *	Screen	Donors	This screen has been modified to allow \$0 Amounts for FRAs, such as United Way, that provide the total donation and the list of donors without providing the amount that each donor has contributed.	HFH of Quad Cities, IA; HFH of Missoula, MT
5	0	32	3/9/07 New Feature	Report	Development > Fundraising Activities > Detail/Summary	The Values comparison options has been added to the Summary option.	Nancy
5	0	33	3/9/07 Problem Correction	Screen	Assignment of Donations to Pledge	After the assignment, if the pledge is complete, and there is no Notification Date, the Notification Not Applicable field is set to true. Also, the current payment that can be assigned to an Unspecified Installment has been modified so that it can be more than a single payment.	
5	0	34	3/14/07 Style	Report	Finance > Mortgages > Payments Due By Amount Due	A note has been added to the bottom of this report that indicates the number of mortgages in bankruptcy or in foreclosure that have been marked for non-inclusion in delinquency lists. This has been done to clarify the confusion about the difference in the delinquency count on this report and the Finance > Mortgages > Affiliate Mortgages Summary, which includes all mortgages.	Martin County FL; Knoxville TN
5	0	35	3/14/07 New Feature *	Report	Finance > Mortgages > Homeowners In Bankruptcy	The name of this report has been changed to Finance > Mortgages > In Bankruptcy or Foreclosure and foreclosures have been added to the report.	Martin County FL; Knoxville TN
5	0	36	3/23/07 Problem Correction	Report	Finance > Electronic Funds Transfer > Candidates	This report was including homeowners who no longer had an active mortgage.	Marquette County, MI
5	0	37	3/23/07 Problem Correction	* General	Pledges	The upgrade program had a bug in it that scrambled the IDs of the fundraising types. As a result new club and periodic pledges could not be assigned.	
5	0	38	3/23/07 Problem Correction	Screen	Escrow Required Balance Detail and Escrow Affiliate Plan	The fields were made larger to hold larger negative numbers.	Kent County, MI
5	0	39	3/29/07 Problem Correction	General	File Organization	Keystone would not provide report headers on a system without a C drive such as a Citrix system being used for terminal services.	Buffalo, NY
5	0	40	4/3/07 Problem Correction	Screen	Donors	If the donor is an organization that has person names associated with it, it was supposed to give the user the option of including the persons on the receipt. If the donor is a person(s) and has an organization associated with it, it was supposed to give the user the option of including the organization name on the receipt.	
5	0	41	4/3/07 Problem Correction	General	Club Pledges	If the groundbreaking date is designated as the event to use for notifications and this date is null; or if the dedication date is designated as the event to use for notifications and this date is null, this would cause an error message and keep notifications from being created.	
5	0	42	4/5/07 Problem Correction	Screen	Donors	If the reference for a donor category was set, for example, to Person1 and a donation was entered for that person; and then the decision was made to change the category reference to "Both" to include Person2, the donation reference could not be modified.	North Central MA
5	0	43	4/5/07 Problem Correction	Report	Development > Donations > By Category	This report was not picking up all the categories in which the donor was participating.	North Central MA
5	0	44	4/6/07 Problem Correction	Screen	Property Addresses	If the property address was assigned to a family partner in the XUD (Undefined) family partnership level, the family partner's name would not appear at the top of this screen.	Knoxville, TN
5	0	45	4/7/07 New Feature *	* General	MTD News Service	A news service has been added to Keystone that makes news on the MTD web site available to users.	
5	0	46	4/11/07 Problem Correction	General	Pledges	The "donor has club pledge" and "donor has periodic pledge" indicators were being set to true only if the donor had an active pledge. This was corrected and ScanDb was modified to correct those that had been incorrectly set in the past.	Blount County TN
5	0	47	4/12/07 Problem Correction	* General	Pledges	Inactive pledges were being displayed when they shouldn't be.	Blount County TN
5	0	48	4/13/07 Problem Correction	General	Pledges	If a pledge had a limiting goal, when that goal was reached, the pledge wasn't automatically being set to inactive. Periodic Pledges fixed here. Club pledges deferred for other changes.	Blount County TN
5	0	49	4/18/07 Problem Correction	Screen	Periodic Pledges	If a payment was split across several pledges, the Paid To Date value was incorrect.	
5	0	50	4/20/07 Style	Screen	Contacts	If a contact name is being used as the contact for a category, attempts to delete the contact name will be blocked with the warning message that the contact name cannot be deleted until the category contact is modified or the category is deleted.	
5	0	51	4/26/07 Style	General	ShowWindowsInTaskbar	The default in Access is to show all the windows open in the Access application as an entry on the taskbar. Keystone doesn't use this. So Keystone has been modified to store the user's current setting, set this option to off, and then restore the user's option upon exiting Keystone.	
5	0	52	4/28/07 New Feature	General	Current User Profile	Keystone has been modified so that when it is started it checks to see if the version of the backend data structure has changed and if it has it stores this value in the user's Current Users Profile to make Keystone easier to update.	
5	1	53	5/4/07 Problem Correction	Screen	Donors	Donations were not being sorted correctly.	Teton Area, HFH of the Greater Jackson, WY