

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										
5.2 Released with Below Modifications and Additions										
5	1	103	8/14/07	Problem Correction			Screen	Purge Contacts	While the purge was executed correctly, several errors occurred due to duplicates from using the Contact Search set. The error messages have been eliminated.	Williamsport/Lycoming, PA
5	1	102	8/13/07	Problem Correction			Screen	Payments	The homeowner has the possibility of having a HFH house address as a secondary address. The mortgage receipt wasn't using the chosen mailing address	Athens County, OH
5	1	101	8/7/07	Problem Correction			Report	Development > Fundraising Activities (FRAs) > By	Active FRAs with no donations were not being displayed on reports as they were expected to.	Towns and Union County HFH, GA
5	1	100	8/7/07	Problem Correction			Report	Development > Donations > By Detail/Summary	The totals for Detail By Total, Summary By Month, and Summary By Year were wrong due to Inkind values being included.	Towns and Union County HFH, GA
5	1	99	8/4/07	Problem Correction	*		Report	Finance > (Labels and Export Data > Auditor Mortgage Confirmation) and (Reports For Homeowners > Mortgage Summary)	The Estimated Payoff Date is computed by dividing the outstanding Principal by the current principal payment to determine the outstanding months. If a homeowner's principal payment has been set artificially low for a special payment plan, an error can occur and the Estimated Payoff Date can be wrong by a substantial amount. This calculation has been change such that if the results of the calculation is greater than the mortgage term, the mortgage term is used instead.	Knoxville, TN
5	1	98	8/1/07	New Feature	*		Report	Development > Fundraising Activities > Detail/Summary With Vogs	A new report was created to show donatoin Amounts, Value of Goods and Services (Vogs), and resulting Donations.	Blount County TN
5	1	97	8/1/07	Style			Screen	Contacts Address tab	The address was modified to display two lines	Boise Valley, ID
5	1	96	7/31/07	Style			Screen	Donors Periodic Pledge tab	The payment amount field was widened to accommodate larger payments.	
5	1	95	7/30/07	Problem Correction			Report	Contact Management > E-mails	Some of the Export options were producing duplicate e-mail addresses.	
5	1	94	7/29/07	New Feature	*		Report	Volunteer Coordination > Hours > By Category	A Volunteer Hours By Category Report has been added which is similar to the Donor > Donations > By Category report	
5	1	93	7/26/07	Problem Correction			Screen	Donors/Club Pledges and Periodic Pledges	If money was allocated to a non-specific pledge, when the allocation screen was closed, this entry wouldn't show up on the Donor screen until the donor was closed and reopened.	Saline, AR
5	1	91	7/26/07	Problem Correction			Screen	Donors/Club Pledges and Periodic Pledges	If money was manually moved from a non-specific entry to a specific obligation and the non-specific entry became \$0 but wasn't deleted, the next time an obligation was created duplicates would be created.	Saline, AR
5	1	90	7/26/07	Problem Correction			Screen	Donors/Club Pledges	Donors who paid ahead where not marked for notification of a new house ground breaking or dedication.	Saline, AR
5	1	89	7/24/07	Problem Correction			General	Item #77 and #78	The Exported Data.csv file was being set to Read-Only	
5	1	88	7/18/07	Problem Correction			Screen	Donors Periodic Pledge tab	If the 1st of the month was on a non-business day, the periodic pledges due on that date would not be generated.	Greater Teton Area, WY
5	1	87	7/18/07	Problem Correction			Screen	Select Delinquency Documents	"Invalid Use of Null" error when posting delinquency notices and a homeowner has made no payments.	Bay Area - Houston, TX
5	1	86	7/16/07	Problem Correction			Screen	Volunteer Hours tab	The screen Hours Status default has been set to the Affiliate Setup Hours Status Default	
5	1	85	7/14/07	Problem Correction			Screen	DBPathSetup; and RelinkDatabase	These screen were not closing properly in the Access 2007 environment.	
5	1	84	7/9/07	Style			Report	Finance > Mortgages > Affiliate Mortgages Summary	Three quality checks have been added that produce warning messages when data can potentially result in reporting incorrect information: duplicate Escrow Schedule History dates; duplicate Principal Schedule History dates; and mortgages that are paid off but still marked active.	Knoxville, TN Arkansas Valley, AK Collier County, FL
5	1	83	7/6/07	Problem Correction			Screen	Escrow Analysis	Estimated (month of change) Beginning Balance was incorrect due to using wrong capture date.	Knoxville, TN
5	1	82	7/4/07	Style			Report	General	Several reports had lost the Fax label in the footer of the report.	
5	1	81	7/4/07	Problem Correction			Screen	Reminders and MTD News	Log reminder queries were reworked to improve performance.	
5	1	80	7/3/07	Problem Correction			Screen	Schedule/Post Hours	Modified the qlkpVolunteersAndHomeownersInd2 query to improve performance.	Okaloosa, FL
5	1	79	7/2/07	Style			Screen	Select E-Mails	The width of the count fields in the lower left-hand corner have been increased so they can hold larger numbers.	
5	1	78	7/2/07	Style	*		Screen	Reports	Selecting a Labels and Export Data report and clicking the Export button will now not only export the data to the Exported Data file, but it will also open the Exported Data file.	
5	1	77	7/2/07	Problem Correction	*		Report	General	MS Office 2007 no longer supports the export of a previewed report to Excel. Therefore, Keystone has been modified to export the record source of previewed reports in both the MS Office 2003 and MS Office 2007 environments.	Denton County, TX
5	1	76	7/1/07	Style	*		Screen	Contacts	The Affiliations/Members tab has been made so that it is not visible for organization records that are not the Primary Contact since neither affiliations nor members should be associated with them. And the Members tab is always displayed for organization records which are the Primary Contact.	
5	1	75	6/19/07	Problem Correction			General	ScanDb	Prior to the fix described in Item #56, hours records could be created for volunteers with no address and these could not be read. ScanDb has been modified to delete these records.	
5	1	74	6/18/07	New Feature	*		Report	Development > Donations	A Donations Five Year Summary report has been added.	Greater Souix Falls, SD Columbus, OH Dorchester, SC

5	1	73	6/17/07	New Feature	*	Report	Contact Management > Labels and Export Data	The Labels Count report was modified for use with all the contact label reports and it was renamed to Total Labels Count so it would appear at the bottom of the list. The functionality of the Multiselect Labels Count report was merged into this report and the Multiselect Labels Count report was deleted.	
5	1	72	6/17/07	New Feature	*	Report	Contact Management > Labels and Export Data	A By Affiliation report has been added.	Pensacola, FL
5	1	71	6/16/07	New Feature	*	Report	Contact Management > Affiliation Members	An Addresses report and Addresses and Communications report have been added.	Pensacola, FL
5	1	70	6/16/07	Style	*	General	F1 Key	Changed to context help rather than the help introductory screen.	Tim Tucker
5	1	69	6/16/07	New Feature	*	Report	Contact Management > Quality Management	An Incomplete Names report has been added for quality control.	
5	1	68	6/16/07	New Feature	*	Screen	Contacts	Incomplete Names has been added to the Filter.	
5	1	67	6/15/07	New Feature	*	Report	Development > Labels and Export Data > Donors FRA Summary	The Donor's Category has been added to this export.	North Central MA
5	1	66	6/15/07	Style		Screen	Escrow Grouping	If there was no data to be exported, the export would be done anyway. This has been changed to display a message and then no export is done.	
5	1	65	6/15/07	Problem Correction		Screen	Closing Fees	If the Monthly Payment is \$0 on the Admin tab, a division by 0 error occurred.	Kent County, MI
5	1	64	6/14/07	Problem Correction		Report	Donor Summay	This report was including in-kind donations.	North Central MA
5	1	63	6/14/07	Problem Correction		Screen	Mortgage Payments	If the user marks a mortgage inactive and, without closing and reopening the screen, tries to mark it active again, Keystone wouldn't allow the mortgage to be marked active.	Kent County, MI
5	1	62	6/13/07	New Feature		General	Current User Profile	The path to Keystone Programs is stored in the Current User Profile at startup to make it easier to update the frontend in the future.	
5	1	61	6/13/07	Style		Screen	Escrow Screen	The Amount field was too narrow	
5	1	60	6/13/07	Style		Screen		The Last Modified Date is Before field was too narrow on several screen filters.	
5	1	59	6/11/07	Problem Correction		Screen	Reminders and MTD News	In some cases when a system is started up MTD News causes a Type Mismatch error.	Blount County TN
5	1	58	6/7/07	Problem Correction		Screen	Purge Contacts	The Last Modified Before Selection produced an error and locked up Keystone.	Chebygogan, MI
5	1	57	6/5/07	Problem Correction		Report	Contacts > Labels and Export Data > MultiSelect Categories	The exported salutation was not correct. It was including person names when it shouldn't.	Boise Valley, ID
5	1	56	6/5/07	Problem Correction		Screen	Volunteers and Scheduling	Volunteers with no addresses were not showing up on pick lists for hours. Hours entered for these on the Volunteer or scheduling screen are lost.	Boise Valley, ID
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5	0	55	5/28/07	Problem Correction		Screen	Volunteers	The attribute for No Preferences wasn't being set correctly and therefore some of the volunteers with No Preferences for skills/interests were not showing up on reports correctly. ScanDb was modified to correct past errors and the problem itself was corrected.	Box Butte County NE
5	0	54	5/21/07	Style	*	General	Tools > Reminder Mgmt; Screens: Reminders Mgmt & Reminders and News	Several labels were changed to improve the accessings of MTD News	
5	0	53	5/4/07	Problem Correction		Screen	Donors	Donations were not being sorted correctly.	Teton Area, HFH of the Greater Jackson, WY
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	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	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	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	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	47	4/12/07	Problem Correction	*	General	Pledges	Inactive pledges were being displayed when they shouldn't be.	Blount County TN
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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	30	3/7/07 Problem Correction	General	Compaction	The backend compaction routine was modified to further reduce the possibilities of errors.	
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	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	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	26	2/17/07 Problem Correction	General	Compaction	The backend compaction routine was rewritten to reduce the possibilities of errors.	
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	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 from the plan. Both the Required Balance Detail and the Escrow Affiliate Plan calculation screens can be displayed at the same time.	
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	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 Setup screen.	Nancy; Quad Cities, IN
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 separate Upgrade Program
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	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	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	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	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	15	1/24/07 Problem Correction	Screen	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	14	1/19/07 Problem Correction	Report	Finance > Escrow Management > Disbursements Detail/Summary > Detail	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	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	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	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	10	1/18/07 Problem Correction	Report	Development > Groups > Donations	This report was displaying a Reserved Error message.
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	8	1/10/07 Style	Report	Affiliate Mortgage Summary	Affiliate signature placement was not working.
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	6	1/4/07 Problem Correction	Screen	Closing Fees	Clicking on Date Due and Enter created an error message.
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	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	3	12/22/06 Problem Correction	Screen	Donors	In-kind donations amount was not being set to \$0 under some circumstances.
5	0	2	12/22/06 Problem Correction	Screen	Donors	Estimated acknowledgement letter: This was not working for all combinations.
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.