Keystone 5.0 Modifications And Additions – Part 2

(Changes made between August 10 to December 22, 2006)

Key: * Could affect screenshots for documentation and training material.
** Requires change to preliminary documentation

I. New Features

A. *Screen – Select E-mail Addresses: An option has been added to this screen to allow either the "To" or "Bcc" (Blind Copy) form of distribution. "To" is the default for single e-mail addresses and "Bcc" is the default for multiple e-mail addresses. (8/26/06)

B. Report – Volunteer Actual Hours Detail/Summary: A Total Count has been added to the By Detail and By Total reports to support reporting to Thrivent. (8/26/06)

C. General – Free-form Dates: Free-form dates will now accept month and day separated by a slash; and when enter or tab is pressed it will auto fill the year. (9/11/06)

D. **Reports – Volunteer Coordination/Labels and Export Data: Export Skills And Interests Data report added. Exports contact information, skill/interest information, and availability information. (9/14/06)

E. *Screen/Report – Volunteer Coordination: "Actual Hours" changed to "Hours" and option for getting reports for scheduled hours added. The options By Activity and Detail/Summary were reworked to provide more meaningful reports. (10/2/06)

F. *Reports – Development/Labels And Export Data/Contact Donor Status – Provides ability to get list of contacts who are donors or not donors for any selected contact category.(10/2/06)

G. *Reports – General: If the first word of the Affiliate's Full Name in Affiliate Setup is "Habitat", their Signature Name is placed under the HFHI logo on all reports. If not, it is placed on top. (10/2/06)

H. *Reports – Volunteer Coordination > Labels and Export Data > Export Work Site Waivers: Exports waiver information for volunteers with scheduled hours for selected work sites and a selected period. (10/14/06)

I. Help – Pressing the F1 key opens the Help screen. (12/10/06)

II. Style Changes

A. *Screen – Affiliate Information\Mortgages Tab: Payment Confirmation label has been change from "One Click Entries" to "One-Click Entries" (Fixed 8/22/06)

B. *Screen – Affiliate Information\Contacts Tab: Address Defaults label has been changed from "ZIP" to "Postal Code" (Fixed 8/88/06)

C. *Screen – Administrator Password Required: Width change to accommodate label. Fixed (8/22/06)

D. Screen – Affiliate Setup\Affiliate Tab\Payment Method – "LN – Loan" has been removed as a payment method distributed with the standard product. (8/23/06)

E. Screen – Property Addresses – Entering the House Completion Date was being used to initiate Club Pledge notifications. This has been changed to the Dedication Date. (8/23/06)

F. *Screen – Reminder Management: The labels on the screen have been changed to clarify their meaning. For example “Show all anniversaries within next 30 days and all reminders.” Has been change to “Show all anniversaries within next 30 days and all open reminders that are due or past due.” (8/24/06)

G. *Screen - Closing Fee Coupon Information Selection: Width problem was corrected. (8/24/06)

H. *Screen & Menu - The caption of the Edit ZIP Codes screen has been changed from “Edit ZIP Codes” to “Edit Postal Codes” to accommodate countries other than the US. The menu option Contacts\Edit ZIP Codes has been changed to Contacts\Edit Postal Codes and the Alt Key has been changed from Z to S.(8/26/06)

I. Distribution Package - The Keystone sources are distributed as part of the product and are located in the C:\Program Files\MoreThanData\Keystone\Sources folder. I have zipped this file so that users don’t mistake it to be the executable file for Keystone. This has the side benefit of making it smaller. (8/28/06)

J. *Screen - Mortgage/Payment Information: The Escrow Paid field on the Mortgage\Principal\Escrow\Other Debt tab was not large enough to hold some values. (Fixed 8/29/06)

K. *Screen - Assign Donations to House(s) – The pledge name has been added to the title bar. (8/29/06)

L. *Screen - Donors\Logs tab – Club pledges looks like it is posting duplicate notifications when it is really posting notifications for different houses. The house Address has been added to these postings to clarify this. (8/29/06)

M. *Screen - Assign Donations to Pledge Installments – The pledge name has been added to the title bar. (8/29/06)

N. *Screen - Donors\Logs tab – Periodic pledges looks like it is posting duplicate notifications when it is really posting notifications for different installments. The installment data has been added to these postings to clarify this. (8/29/06)

O. *Screen - Mortgage/Payment Information: Changed label “Date Of First Payment In Habitrak” to “Date Of First Payment In Keystone” (8/31/06)

P. *Screen - Mortgage/Payment Information: When entering a new mortgage, the First Full Payment Date had to be entered in several places. This has been changes so that after the first entry the other entries are provided automatically. (8/31/06)

Q. Screen - Updating Notification – Sized incorrectly when displayed. (Fixed 9/1/06)

R. Report - Mortgage Payments Due By Amount Due: Title date field too narrow. (Fixed 9/1/06)

S. *Screen - Merge Disbursement Payees: Escrow Categories label was too narrow (Fixed 9/5/06)

T. *Screen – Purge Contacts screen was set to automatically resize and was resizing to display only one entry. (Fixed 9/6/06)

U. *Report – Finance/Escrow Management/Effective Dates: Earlier in the development of V5, “Effective Date” was change to “Renewal Date” on the Mortgage/Payments Information screen. However, the names for reports on these dates were not changed.. (Fixed 9/7/06)

V. *Screen – Address -> Homeowner screen: Wasn’t being sized correctly and telephone number fields still had input masks on them. The masks were removed (Fixed 9/7/06)

W. *Screen – Options/Reminder Management tab: Changed options “… reminders …” to “… reminders that are due or past due …” to provide clarification. (Fixed 9/7/06)

X. General – Database Selection: When it made a copy it gave it the name “Copy of Habitat_Data.mdb”. This has been changed to “Copy of Keystone Data.mdb” (9/7/06)

Y. *Screen – System Information: Label changed from “Backup Folder” to “Backup Files Folder” (9/7/06)

Z. *General – QuickBooks posting – Postings in QuickBooks were marked “Hbtk XFR”. This has been changed to “Kyst XFR”. Also, the Post button has been disabled during posting to ensure that it is not clicked twice for the same posting. (9/8/06)

AA. *Screen – Family Partners: Labels “Homeowner 1” an “Homeowner 2” changed to “Partner 1” and “partner 2” respectively. (9/9/06)

BB. *Screen – Reports: A “Labels and Export Data” category was created under Construction and the Export Property Data was placed in this category. (9/9/06)

CC. *Screen – Reports: Some option labels named “ZIP” were renamed to “Postal Code” (9/11/06)

DD. Screen – Edit Postal Code: Some messages still referred to”ZIP”. Renamed “Postal Code” (9/11/06)

EE. *Screen – contact screen Addresses – “ZIP” renamed “Postal Code” (9/11/06)

FF. *Screen – Select E-mails: Name has been change to Select E-mail Addresses (9/13/06)

GG. **Screen – Reports: Volunteer Coordination/Labels and Export Data: “Volunteer Hours Actual” change to “Hours Actual” and “Volunteer Hours Scheduled” changed to “Hours Scheduled” (9/14/06)

HH. **Screen – Reports – The contact id, list of communications, and list of e-mail addresses were added to several exported data sets (Label and Export Data reports) to make them more useful for ad hoc analysis, reporting, and merge letters. (9/17/06)

II. *Screen – Select E-mails: The “Get Mail” button has been changed to the “Send Mail” button. (9/18/06)

JJ. *Screen – Donors/Club Pledge tab: Since Club Pledge notifications can now be done based on the ground Breaking date or the dedication date, “House Cmplt” has been changed to “Ground Breaking” or “Dedication” depending what the user has chosen. (9/18/06)

KK. *Screen – Reports: Development/Donations “Acknowledgement” changed to “Acknowledgement Letters” (9/19/06)

LL. *Screen – Contact Filter: Label changed from “Contact’s With” to “Contact Selection” to be consistent with other filters.(9/22/06)

MM. *Screen – Mortgage/Payment Information: Group Membership tab moved to end since all the other tabs are entry/display tabs and this one is only a display tab. (9/22/06)

NN. *Screen – Escrow Analysis Setup – “Start Date” changed to “Effective Date” for consistency. (9/25/06)

OO. *Report – Volunteer/Labels and Export Data/Export Skills and Interests: Communication and e-mail lists limited to those of the specific contact. (9/28/06)

PP. *Screen – Delinquency Letter Data: “Send?” was changed to “Inc.” to be consistent with other screens; and the Ltr # field was change to a pull-down list with the names of the letters to make it easier to use for users.(9/28/06)

QQ. Screen – Reports Screen: Option label “Fra” was changed to “FRA”.(9/28/06)

RR. *Screen – Start Screen: The affiliate name has been removed from the Start Screen and placed on the Title bar. The Start screen has been reworked but has probably not reached its final format(10/2/06)

SS. *Screen – Add/Delete/Modify contacts: Since contacts who are volunteers must be in the Volunteer/General category in order to be displayed on the Volunteer screen, if a contact is added to a volunteer category and they are not already in the Volunteer/General category, they will be automatically added to Volunteer/General category. (10/15/06)

TT. *Screen – Schedule/Post Hours: The Selection Date has been put inside the Input Default Pane since it is one of these defaults. (10/28/06)

UU. *Screens – Family Partner; Property Address; and Mortgage/ Payment Information: “Ledger #” has been changed to “Ref. #” (10/28/06)

VV. *Screen – Schedule Post Hours: The Selection Date has been moved to the top of the Input Default Pane since it is the first thing selected on the screen. (11/1/06)

WW. *Screen – Covenant Partners/Contributions tab: The Total field has been protected with its background color set to blue. (11/1/06)

XX. Reports - Construction > Property Summary: The option of putting the affiliate signature above or below the HFHI logo was not working. (12/15/06)

YY. Reports – Finaince > Reports for Homeowners > Mortgage Summary: The field for the DLP was too small. (Fixed 12/15/06)

III. Problem Corrections

A. Donations – Club Pledge: Club Pledges can have beginning dates and end dates. When the Groundbreaking Date was added as an option for initiating notifications, and the user has selected this option, this date was not being used to qualify the initiating of notifications. (Fixed 8/23/06)

B. Donations – Club Pledge: A new Club Pledge member notification letter was introduced with 5.0 for members who were paid up but should be invited to the Club Pledge Event (Ground Breaking or Dedication). This was not restricted to future dates, which resulted in the possibility of letters being generated for past events. (Fixed 8/23/06)

C. Salutation – A salutation query had a syntax error which was affecting merge letters. (Fixed 8/24/06)

D. Report – Contact Management\Profiles: Had the error "Enter Parameter value DNDonation". (Fixed 8/24/06)

E. Report – Contact Management\Labels and Export Data\No Mailings: Labels report: Had the error "Enter Parameter Value CntcZIP". (Fixed 8/24/06)

F. Report – Contact Management\Labels and Export\Label Count: Had the error "Syntax error in GROUP BY clause" (Fixed 8/24/06) [Note: In the process of doing quality control on Keystone before the beta was release, the string function "Left" was incorrectly modified. This introduced errors in several areas that have been fixed.]

G. Screen – Reports: Users could edit the text on the selection tree view. This did not change the underlying report name, and when the Report screen was reopened the modified text would be reset. However, a user should not be able to change this text. (Fixed 8/24/06

H. Screen – Affiliate Setup: When a number of months greater than 255 was used for the Affiliate Default Mortgage Term it would produce an error. (Fixed 8/25/06)

I. Screen – Contact: When the Word button on the Contact screen was click on the Contact screen it would produce and error. (Fixed 8/25/06)

J. *Screen – Select E-mail Addresses: This screen was supposed to open up with multiple lines for e-mails but was not doing so. (Fixed 8/26/06)

K. *Screen – Edit ZIP Codes: A working field that was supposed to be hidden was not (Fixed 8/26/06)

L. Report – FRA Detail/ Summary: When the Summary report is run, if the All Types, All Statuses and All FRAs options are selected, totals for Non-Fra Donations and Grand Totals are displayed. These totals were being computed incorrectly. (Fixed 8/26/06)

M. Screens – Property Acquisition: The Filter button was not being initialized and so was not working correctly. (Fixed: 8/27/06)

N. Distribution Package: The workgroup file, System.mdw, has been added to the distribution package and the shortcuts have been modified to use this file. (Fixed 8/28/06)

O. Screen – Escrow Analysis Setup: When the Initialize Escrow Analysis button is clicked, some of the homeowners get the error "Object variable or with block variable not set". (Fixed 8/29/06)

P. Screen – Donors/Club Pledges tab and Periodic Pledges tab: If a donor has both active and inactive Pledges, Keystone was opening these pledges alphabetically, independent of their Active Status. This caused the wrong pledges to be displayed and when Assignment to of donations was done, the wrong pledge for the assignment. The Pledge pull-down list was also showing the pledges in the wrong order and included a "No Active Club Pledge" or "No Active Periodic Pledge" as an entry in the list when other pledges were in the list. (Fixed: 8/29/06)

Q. Reports – Club Pledges\Detail; Club Pledges\Pledges VS Donations; Periodic Pledges\Detail; Periodic Pledges\Pledges Vs Donations: When a donation was made that was split across several pledges, each pledge on this report was being given the full value of the donation, thereby overstating the pledge total donation amount. (Fixed 8/29/06)

R. Report – Family Services\Delinquencies\Delinquency Management – The report was not wide enough to display some of the fields. (Fixed 8/30/06)

S. Screen – Contacts: The Last Modified field was not protected and could be modified by a user. (Fixed 8/30/60)

T. Menu – Tools\View Users: Attempts to use this functionality were producing an error. (Fixed 8/31/06)

U. Report – Volunteer Coordination\Labels and Export Data\Volunteer Hours Actual: If John Smith and Mary Smith both worked the same day at different houses and you selected labels for the house John worked at, you would get labels for both John and Mary. (Fixed 8/31/06)

V. General – Right clicking on any field in Keystone was supposed to display a small popup menu with Cut, Copy, and Paste options. This was not working. (Fixed: 9/1/06)

W. Reports – The HFHI Logo was previewing alright, was printing from the preview alright but wasn't printing when the Print button on the Report screen was clicked (Fixed: 9/3/06)

X. Report – Family Services\Sweat Equity\Detail_Summary options By Month and By Year: When Family Partners name was selected, their name wasn't appearing in the title; and hours ByHO For Others wasn't being shown. (Fixed: 9/3/06)

Y. General – ScanDb: ScanDb was using some old Habitrak constants to set to location of some templates. (Fixed 9/5/06)

Z. General – QuickBooks: Posting was resulting in the error "Amount in invalid format". (Fixed 9/7/06)

AA. Report- Labels and Export Data\Volunteer Hour Scheduled – Export was producing an error. (Fixed 9/9/06)

BB. Distribution CD – Templates: "Templates/Homeowners" folder was being referred to as "Templates/Homeowner" folder (without the "s") by Keystone Programs so that homeowner receipts were not accessible. (Fixed 9/11/06)

CC. Templates – Donor Receipts miss-spelling: "too" changed to "to" (Fixed 9/11/06)

DD. Reports – Family Services/Sweat Equity/Detail_Summary: This report was supposed to allow Detail reports to be selected for individual homeowners but not for the << All Homeowners >> selection. It wasn't allowing Detail to be selected for any homeowner selection. (Fixed 9/12/06)

EE. Screen – ScanDb: When viewing and printing the Error report, The wrong close button could be pressed and Keystone could be accidentally closed. Fixed (9/14/06)

FF. General – A user could do a Tools/Relink while a form was open, which could damage the data. (Fixed 9/14/06)

GG. General – Security: When the system was set to User-Level Security, and a user given only Read-Only access to all the functional areas, on a "new" "empty" database there were several errors. (Fixed 9/16/06)

HH. General – Backup: The Default Backup process was not working properly. It was storing files in the wrong location due to having old Habitrak constants. (Fixed 9/18/06)

II. General; - Many of the pull-down lists were not behaving if a null value was entered. These were reviewed and many of them were modified to improve this situation. (9/28/06)

JJ. Report - Contact Management>Communication list and Audit Trail>Donations reports: Too wide. (Fixed 9/28/06)

KK. Report - Homeowners Excluded from Delinquency List: This report was listing homeowners that were no longer in the program. (Fixed 9/28/06)

LL. Reports - FRA reports were not listing FRAs with no donations and in some cases were producing an error. (Fixed 9/30/06)

MM. Report - Volunteer/Profile report: Too wide. (Fixed 10/02/06)

NN. Report – Volunteer Coordination > Labels and Export Data > Hours Scheduled: Export was not exporting all of the necessary data. (Fixed 10/13/06)

OO. Screen - Donor/Recurrent Pledges: If a donor has more than a single pledge and some are inactive, the pledge tab would sometimes open on an inactive pledge rather than an active pledge. (Fixed 10/15/06)

PP. Reports - Periodic Pledge/Detail: The period goal was being computed incorrectly, which also made the balance incorrect. (Fixed 10/15/06)

QQ. *Screen – Escrow Analysis: Earlier in V5 development a change was made to fix what was thought to be a problem. It turns out that what was thought to be a problem was not and the changed introduced the problem of the cushion being counted twice. (Fixed 10/28/06)

RR. Screen – Contact: The Undefined record was being displayed in Selection By Contact/Organization when it shouldn't be. (Fixed 10/28/06)

SS. Reports - Labels and Export Data - Volunteer Hours Scheduled and Family Partner Sweat Equity: Missing Time Scheduled values were causing report errors. (Fixed 11/1/06)

TT. Reports – Labels and Export Data – Family Partner Sweat Equity: The Schema used for exporting was incorrect. (Fixed 11/1/06)

UU. Reports – Labels and Export Data – Finance/Auditor Mortgage Confirmation: A value of 0 for a monthly payment was causing a divide by zero overflow. (Fixed 11/1/06)

VV. Screen – Closing Fees: When the closing fee was posted, the entry created on the Closing Fee screen didn't include an NS; and the posted value wasn't being added to the Escrow Paid To Date and the Escrow Balance fields on the Mortgage/Payment Information screen. (Fixed 11/1/06)

WW. Screen – Donation/Club Pledge Tab: The date for notifying Club members was changed to be optionally the ground breaking data or the dedication date, but the value entered in this field didn't reflect this change.(Fixed 11/1/06)

XX. Screen – Mortgage/Payment information: When setting up a new database with mortgages already in progress, the first late fee calculation was incorrect. (Fixed 11/4/06)

YY. Screen – Payment: A message about the payment not covering late fees was being displayed on nonstandard payments when it shouldn't have been. (Fixed 11/8/06)

ZZ. Screen – Contact/Purge field: the purge field should not be allowed to be checked if the contact is a volunteer who has contributed hours to family partners' sweat equity. (Fixed 11/8/06)

AAA. General – Keystone has been modified to accommodate a new Help File system. The location of the Help file in Affiliates Setup has been changed to browse to a Help Files folder rather than a .chm file; context IDs have been added; and calling code modified. (Fixed 11/8/06)

BBB. Menu – Help > Change Request was causing an error (Fixed 11/10/06)

CCC. Screen – Escrow Grouping: When a recurrent payee with unequal payment dates had reached the last date in their payment schedule, Posting would produce the wrong Next Payment Date. (Fixed 11/11/06)

DDD. Report – Family Services > Family Partner > Logs > Reminders > List by Date: Dates where not in ascending order. (Fixed 11/13/06)

EEE. Recurrent Pledges – The handling of multiple active pledges was not being done correctly and was producing an error. (Fixed 11/16/06)

FFF. Screen – Purging: Several problems were fixed. The Purge screen was resizing too small so the Close button couldn't be seen. Protection with notification was added to contacts that shouldn't be deleted; the Undefined record, History records, Escrow Payees being used in disbursements, Property Sellers associated with properties; and Volunteers who contributed hours to sweat equity. The process was also made faster, which allows the progress status to be displayed correctly. (Fixed 11/19/06)

GGG. Recurrent Pledges – Pledge Dates were not being sorted correctly, Reminder templates were not supporting the option of having the Affiliate signature above or below the HFHI Logo, and Club Pledge reports and Reminders were not supporting the option of using either the groundbreaking or dedication date to determine the pledge due date. (Fixed 12/03/06)

HHH. Security – Using user-level security and changing some of the setting to Read-Only caused several major errors to appear. (Fixed 12/10/06)

III. Screen – Reports: An error would appear occasionally when the Report screen was opened. I fixed a bug which may have been causing this problem. (Fixed 12/10/06)

JJJ. Reports – Volunteer Coordination > Interest/Skills > E-mail List: This report was causing an error and deleting the Exported Data file. (Fixed 12/15/06)