

Keystone 7.2 - New Features and Improvements

General Overview

We made many small improvements and corrections to the general software, and some of those improvements are detailed in the following sections.

- Added a Monthly Mortgage Statement as an alternative to using our Mortgage Coupons. The Mortgage Statement may be printed, a PDF copy may be stored automatically in the Family Partner's Keystone Document folder, and a log entry is made indicating the Statement was printed. Designed the statement to use a #9 two-window envelope for easy mailing.
- Made a major improvement in the process for closing out a Mortgage in Keystone. Created a prompted process to lead you through the multiple steps when you close out a Mortgage, including a 'Hold' status for KeyCredit users, which helps you complete the closeout of KeyCredit first before the Mortgage is closed in Keystone.
- Extended click-through technology to the reminder management process, which allows Keystone to be used as a workflow processor. One person may set a reminder for another person to perform some activity, and the click-through brings that person to the correct Keystone screen automatically.
- Our extensive Help system returns and is better than ever. Security changes by Microsoft blocked our Help system, so the Help now runs from the new MTD website. Access to the context-sensitive help via the F1 key also returns. Please check it out.
- Added an internal check of the Keystone database's integrity that will run once each day when the first person opens Keystone. This may take a minute or longer, but it is an important process to keep your Keystone database performing correctly. This integrity check will analyze the Keystone database and will report data structure problems. This is a major step to ensuring quality assurance in your data collection and reporting. The new and improved data integrity will be worth the minor wait each day.
- During the upgrade from 7.1 to 7.2, the upgrade program checks for incorrectly deleted FRAs in the Keystone database, and if any are found, the program will recover them and identify these FRAs as recovered. In order to preserve the Keystone donations history, Keystone will not allow FRAs to be deleted. If you want to reduce the number of FRAs you have created, they may be merged.

Contact Management

- Added a feature to the duplicate address report to exclude duplicate addresses where a relationship is defined. This will make this report more effective in managing duplicate contacts.
- The merge contacts process was corrected to allow donations from each person being merged to stay with that person.
- The Filter button on Contacts now allows you to filter words in the Address Notes field. This will aid in doing cleanup work from KeyAddress.

Document Management

- The folder management process was modified to facilitate the use of sub-folders within the Document Managed folders.

Finance

- Added the option to run the Disbursements Detail/Summary report by Mortgage Groups as well as Escrow Categories.
- On the Payment Due/Schedule tab, for the Expanded Prior Payment History note, to indicate if the cursor is hovered over a number, a date for that number is displayed; and, if the number is double-clicked, the payment on that date is displayed.
- Added the Ledger/Reference number to 15 reports to allow cross-referencing to internal control processes.

Escrow Analysis

- Double-clicking in the highlighted affiliate plan fields now opens the Escrow Calculator. Also, moved the highlight to Communication To Homeowner fields and added custom positioning to the Escrow Affiliate Plan. Custom positioning allows you to drag a form to another place on your screen and click on the @ so that screen will open in that position in the future. Hint: Look for that @ on other forms.
- The name of the distribution in the upper right-hand corner was changed from 'Status Distribution' to 'Keystone Status Distribution'.

Subscription Information

- The Subscription Renewal button on the Affiliate Setup tab has been renamed to Contact Information/Keystone Annual Licensing and highlighted to indicate that you can now both renew your Keystone subscription and update your Affiliate contact information using this button.

Affiliate Setup

- Our new website has a customers-only section that allows you to get products and services from a single sign-on. The Email of Record for your Affiliate is now displayed prominently at the bottom of the Affiliate Setup tab. If you need to change this Email Address you will need to do it through the new Contact Information/Keystone Annual Licensing button described above.
- Modified the delete process for skills and interests on the Volunteer Skills and Interests tab in Affiliate Setup.