

DonorPerfect Release Notes

Updated 1/5/2012

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DonorPerfect 10.55 Release Notes (1/5/2012)

Updates to System Reports

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Running a full update will overwrite ALL reports.

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Reports Overwritten in 10.55

- Giving Potential Report
-

Modifications

Improvements in Version 10.55

- The EFT process now uses the MM/DD/YY date format to check the desired start date for pledges against the processing date. Previously, the start date was only checked against the month and year.
- The **Edit Auto-Entry Fields** option on the **General** tab of the Entry Screen Parameters screen has been removed.
- DP Canada customers are now able to add new constituents using the Scanner module.
- Corrected the order of the **Size** and **Poten** headings in the Giving Potential Report.
- Consolidated receipting no longer leaves temporary files in the installation folder.
- Clicking on the OK button in the Duplicate/Reprint message of Consolidated Receipting 2.0 no longer takes the user out of the receipting process.
- An option has been added to the EFT Transmission screen that allows SafeSave Payments Gateway users to use the Start Date of a pledge to determine whether or not to create an EFT transaction for the pledge. If the current date is before the Start Date of the pledge, the EFT transaction will not be created.

Corrections in Version 10.55

- When a phone number is updated, the **Modified Date** and **Modified By** fields are now updated properly.
- Eliminated an issue that caused Microsoft Word to hang with a “Processing Word Merge. Close Word to Continue” message when generating letter receipts.
- Restoring from a backup that was made in a version of DonorPerfect earlier than 10.54 no longer causes error messages.
- The **SHOWGLINK()** function now returns pledge information correctly when used as part of the letter receipting process, or when exporting data using a gift/pledge export template.
- Validation has been added to the **SHOWGLINK()** function to ensure that matching quotes have been added around field names. This prevents an Error Code 36 from occurring when a mail merge or export is run using **SHOWGLINK()**.
- Adding a display-only logical field from another table to a screen no longer generates an error message.
- The **SHOWLINK2()** function now returns the correct information.

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DonorPerfect 10.54 Release Notes (10/17/2011)

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Reports Overwritten in 10.54

- Membership Status by Counts
- Membership Status by Income
- Events Export to Excel
- Summary Listing
- Contact Listing
- Comprehensive Report
- Balances Due - Historical Pledge Report
- Import Profile Report
- Forecast Report - Actual

Modifications

Improvements in Version 10.54

- The Membership Status reports have been modified to calculate based on 365 days plus a user-defined number of Leeway Days, instead of a fixed number of 450 days.
- An Attendees report has been added to the Event Management module. This report lists all of the attendees for an event in alphabetical order.
- Once the Export to Excel report is used to export details from the Event Management module, a system message will automatically appear asking if you want to open the file in Excel. This is similar to how the other file export options in DonorPerfect already work.

- The **Password Protection** parameter in the General Parameters screen will only appear for multi-user systems. It will no longer be displayed on single-user systems. The text **Password required for Multi-User systems** will no longer appear on the screen.
- The Duplicate Maintenance screen can now merge donor records that do not have phone number records without triggering an error message.
- The Report Info text for the Summary Listing no longer erroneously states that there is a Year-To-Date Total field in the report.
- The **Showglink()** function now works for exporting records as well as mail merge. You must use a selection filter that selects only “S” type records.
- The Contact Listing report now allows you to drill down to a donor’s contact record.
- You can now add a phone number for an individual when creating a new record using the Link Name to Gift screen.
- The Comprehensive Report now includes a column for **Gift Type**, so that soft credits can be more easily identified.
- The **Mailseg Updates Other Info File?** parameter has been removed from the **Mailings and Labels Parameters** tab of the Report and Mailings Parameters screen.
- In Code Maintenance, we now validate **tyletter** codes before adding them to the system or updating them.
- On the **Mailings and Labels Parameters** tab of the Report and Mailings Parameters screen, there is now a **Browse** button for the **Directory to put mail merge files** parameter.
- The “Balances Due – Historical” pledge report now generates results based on the pledge date field, not the payment start date.
- A new field, **DPGGROUP**, has been added to the Other Info table, to be used to track DonorPages Groups.
- The About DonorPerfect screen that is accessible from the Help menu has been updated to list the latest phone numbers for Support, Sales and Training, as well as the current email address for Support.
- A new **Help** menu item has been added that opens the UserVoice web application in a new browser window.

Corrections in Version 10.54

- The Default Settings for the Main Entry Screen now allow different default settings for individuals and organizations.
- The Import Profile report in the Import Module no longer allows long filenames in the **Source File** field to wrap around and overwrite the **Import View** listing.

- The **SHOWLINK()** function no longer generates error messages.
- Eliminated an error when the Duplicate Maintenance function was run after importing DonorPages gifts.
- The Accounting Module will now create output files and name them properly when the file name or path contains spaces.
- Running a report from the Manage Auction Details screen no longer prevents you from being able to edit auction item bundles.
- When running Contact Manager in Calendar mode, changes to a record's transaction status are now seen immediately.
- When a gift is associated with an alternate address in the Event Management module, the gift record will display the correct alternate address in the Gift Entry screen.
- Users can now enter a report heading for the Batch Report (Financial) from the Dashboard interface without triggering errors and generating a duplicate listing for the report in the Dashboard.
- The Event Management module's Export to File report is no longer added to the Quick Report Options list on the Welcome screen, since it cannot be run from there.
- The Quick Report Options tab on the Welcome Screen no longer lists the Giving Range Report twice.
- Eliminated error when running the Giving Range Report from the Welcome Screen.
- Running the "Forecast Report – Actual" with **Run Report By** set to **Quarter** now displays the correct headings on the pages after Page 1.
- Users can now enter a report heading for an Event report from the Dashboard interface without triggering errors and generating a duplicate listing for the report in the Dashboard.
- The **Show Pledges on History List?** parameter no longer affects the Export to File report. Only the History Listing report is affected.
- Spell Check now works on the Narrative fields when Microsoft Office 2010 is installed on the computer.
- A **Cancel** button has been added to the Field Lookup screen in Code Maintenance, so that users can cancel out of adding a code.
- The "Balances Due – Historical" report now sorts properly.
- Eliminated an indexing issue that caused the Moves Management module to generate an error when a new action was associated with a constituent record.
- When exporting a file to a location outside of the DonorPerfect application folder, DonorPerfect is now able to open the file in Excel after the export is completed.

- Eliminated error message when running the Participant Report in the Event Management module.
- Eliminated error when merging two donor records that have 50 or more phone numbers each.
- Mail Merges will now work properly if the file extension is missing from the name of the **tyletter** code in Code Maintenance.
- Editing a payment method no longer causes the account type to be deleted.
- Clicking the **Clear All Tabs** button in the Quick Gift Entry screen, then clicking the **Cancel** button no longer triggers an error message.
- Editing a pledge payment with an Unusual Payment Schedule no longer triggers an error.
- Clicking on a **Comments** entry in the Contact Management Lookup screen no longer triggers an error message.
- Clicking on either of the scroll bar arrows in the **Actions** tab of the Moves Management module before any actions have been entered no longer triggers an error message.

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DonorPerfect 10.53 Release Notes (4/29/2011)

Updates to System Reports

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Reports Overwritten in 10.53

- Comprehensive Donor Analysis Report

Modifications

New Features in Version 10.53

- The User Security Settings screen now contains separate permission settings for Batch Entry and Batch Settings. This allows you to give individual users access to Batch Entry but prevent them from changing settings.
- The Import Module has been upgraded to Version 3.0. Import Module 3.0 includes the following new features:
 - A “Check Imported Records for Duplicates” option has been added to the Import Settings screen (previously Import Options). If checked, Duplicate Maintenance will start automatically at the end of the import process, and will check only the imported records to see if they are duplicates of existing records.
 - The new Close Match import setting will cause the Import Module to use a customized set of matching criteria to look for duplicate records at import time. If duplicate records are found, an interactive On Screen Matching screen will appear that allows you to resolve the duplicate records during the import.
 - The Import module now allows users to save their import profile at any point during the import process.
 - The Import module now gives users the ability to export various categories of records (Processed, Added, Updated, Skipped, or all records) to a **.CSV** file at the end of the import process
 - The matching expression in the Import module can now be reset to the system default matching expression.
 - When users cancel an import in the Import module, they now have the option to re-index their database and perform duplicate maintenance.

Improvements in Version 10.53

- The Custom Report Designer has been updated to use a tabbed interface in the Edit Field screen.
- A sub-menu item has been added for WealthEngine in the **File** Menu, under **Modules (Tasks)**.
- In the Moves Management module, the **Moves Management Action** field has been renamed to **Moves Management Action ID**, and the **Moves Management Plan** field has been renamed to **Moves Management Plan ID**. This is intended to make the Moves Management module less confusing.
- The **.dbf** and **.txt** export options have been added back into the Flexible Information Generator.
- The **ADDBLOCK** field has been expanded from a character type field to a memo type field, to allow for extra-long text such as IIF statements.

- The **Already Thanked** letter type in the Receipts screen has been renamed to **Already Processed** in order to avoid confusion.
- An **All Operators** option was added to the selection filter screen to allow users to select any operator as part of a selection filter.
- The **USERNAME** and **USEMAIN** fields are no longer editable for the primary address record. This prevents users from accidentally overwriting a seasonal address with the primary address that is displayed on the main screen.
- The values in the **SPLITGIFT** and **PLGPMT** fields of the Gift record are no longer editable by users.
- Copying an address to the clipboard using the Copy Address Block function no longer returns users to the Main Entry Screen if they were previously on another screen.
- A Close Match option has been added to the Import module. When activated, this option allows users to identify record matches that are not 100% exact.
- The **Opt Out** field in the Moves Management module has been changed from a list to a check box.
- When you drill down into a donor record from the Review tab of the Moves Management module, phone information is now included with the donor record.
- The formatting of the gift list in our mail merge templates has been improved, so that there is better spacing between columns.
- The **Submit** button on the Insta-Charge form is now disabled after the first click, preventing users from accidentally submitting duplicate transactions to the SafeSave Payment Gateway.
- The **Process Transactions** button on the EFT Transactions screen is now disabled after the first click, preventing users from accidentally submitting the transactions a second time.

Corrections in Version 10.53

- The system now displays the correct Last Backup Date after the backup folder is changed to be outside of the program folder.
- Eliminated errors in the Batch module after data is restored from a backup that did not have the Batch module installed.
- When an email template is created, and used to export data to an Excel file, the ZIP Code data format is no longer incorrectly applied to the field before the actual ZIP code.
- In the Receipts screen, an unprocessed batch of receipts from one user no longer prevents a different user from being able to update their own batch of receipts.
- The Reason field in the Moves Management module now updates correctly when you update a Reason value from the Review screen.

- The Invited column on the Event Management Invitations screen can now be used to sort the list of contacts.
- Users can now combine the **DP** and **DPADD** tables using an **OR** operator when setting up a selection filter for the End of Year Letter mail merge. Only the **DP** and **DPADD** tables may be combined this way for the EOY Letter mail merge.
- The End of Year Letter mail merge gift selection filter works normally again.
- Restored the descriptions for mailing codes to the Moves Management Action tab.
- Solicitation Code can now be selected again when building an export template.
- The Batch Scanning module no longer generates “TDPBGIFT is not found” errors during batch processing.
- The Batch Scanning module no longer creates pledge payment records using the Created By value from the pledge instead of the User ID of the person who made the payment.
- Autocalc fields now calculate correctly when split gift options are in use.
- Eliminated index errors when restoring from an earlier backup.
- Duplicate Maintenance now distinguishes primary address records from alternate address records when searching for duplicates, so that primary address records are not incorrectly checked against alternate address records.
- When a user account’s security settings are modified, the Modified By and Modified Date fields are now properly updated.
- The rarely-used DB file delimiter type has been removed from the Mailings and Labels Parameters screen.
- Double-clicking on a donor in the Event Management Registrants tab now opens the Info Sheet report for that donor immediately, without any spurious prompt to display contact information.
- The Comprehensive Donor Analysis Report no longer includes the gift table in its selection filter builder.
- Eliminated error message when Canadian systems process receipts.
- Exporting mail merge data files now saves the data files in the specified directories, instead of in the **/DPW** subdirectory.
- Editing the backup directory no longer causes an Open Table screen to appear.
- Insta-Charge now passes the Order ID to the Safe Save Payments gateway for donors who lack a vault ID.
- Using an integer field as an Import Matching field no longer triggers an error message during the import process.
- When a constituent record is created from a guest entry in the Event Management module, the constituent name is no longer set to the name of the donor

accompanying the guest. Also, the constituent is automatically set up as being **Invited** to the event, instead of **Paid, Attending**.

- The SafeSave Payments Gateway will no longer treat two separate EFT transactions that were submitted in quick succession for the same payment as duplicate transactions.
- When a Guest in the Event Management Module is converted into a constituent, the new constituent record now appears under their own name in the Registrants tab, as an Invited guest on the Invitation tab, and their status is no longer incorrectly set to **Paid/Attending**.
- DonorPerfect no longer allows you to incorrectly cancel a gift submission by clicking the **Cancel** button after the gift has been processed.

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DonorPerfect 10.52 Release Notes (12/17/2010)

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Reports Overwritten in 10.52

- Cross Tabulation Report
- Giving Range Report
- Balances Due Report
- Event Status Report

Modifications

Improvements in Version 10.52

- A Total Count of donors and a Grand Total amount have been added to the end of the Giving Range Report.

- Sub-totals for guests and registrants at each event have been added to the Event Status report, along with a Total Number of Attendees at the end of the report.
- Corrected spelling of the word “Respondent” in a status message on the Response tab of the Event Management module.
- The name of the export file for the Event Management screen has been changed to **Event_Export** instead of **Auction_export**.
- If the user clears the **Export File Name** field during the Export to File process, a warning message is now displayed, and the focus is returned to that field.
- In the Receipts screen, users can now recreate mail merge data files for letters that have already been processed by selecting the **Already Thanked** option and selecting which records they want to include in the mail merge data file.
- A **Hide Inactive Events** option has been added to the Manage Auction Details screen.
- The **Mailed, Goal, Printing, Other** and **Codedate** fields now appear in the Code Maintenance screen for Campaign codes by default.
- In the Moves Management module, an option group has been added to the Constituent tab that lets users export records for **Assigned Constituents, Unassigned Constituents, or All Constituents**.
- Internet Explorer users can now navigate the SafeSave Payments Gateway Console without having to re-enter their credentials.
- DonorPerfect now validates whether a user has access to the **Mailmerge** and **Backup** folders during startup.
- Corrected spelling of the word Responses in the report information for the Event Status Report.

Corrections in Version 10.52

- Resolved an issue that prevented installation from completing on systems that contain a DPW32 folder, when DonorPerfect is actually being installed to a different folder.
- Eliminated error message when RECTYPE is used as one of the fields in the Cross Tabulation Report.
- When building a selection filter, the screen no longer bypasses the default operator and selects “Equal To” if the user skips Step 3 and does not select an operator.
- The **Edit Template** and **Do** buttons on the Export to File screen no longer become disabled if the user deletes all gift templates and creates a new template via the Reports/Listings screens.
- Clicking the **No** or **Cancel** buttons in the Export to File screen after you click **Do** to export data to an Excel spreadsheet no longer triggers an error message.

- Exporting to an Excel spreadsheet from the Export to File screen no longer triggers an error message when the export file has one or more spaces in the path.
- Exporting to an Excel spreadsheet from the Export to File screen no longer triggers an error when the export file path is set to **C:**.
- The list of invalid characters that the End of Year Letter Mail Merge function displays now properly displays the “|” character.
- Custom reports that use transactional data such as gifts are now displaying the correct data when set to display only the current transaction. Performance issues have also been resolved.
- Eliminated an error message when updating a system from DonorPerfect Version 9 to the current version.
- The Quick Entry screen now handles multiple addresses correctly.
- The Giving Range Report no longer generates spurious orphan record messages.
- The Anonymous Donor/gift functions no longer generate an invalid field message under certain conditions.
- Eliminated error message when the Moves Management fields are on a subscreen of the Contact screen and the user clicks the Done button without opening the subscreen first.
- When the “Treat Pledges as Income” parameter is enabled, Auto-Calculated Fields with a blank Calculated By field no longer trigger error messages.
- The Balances Due report now exports 5 character solicitation codes correctly when the **Export to Excel - Export Data Only** function on the Preview screen is used.
- On the Link Name to Gift screen, the Edit and Delete buttons are no longer active when there are no linked constituent records present.

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DonorPerfect 10.51

This was a maintenance release that came out shortly after the 10.50 release. No new features were added.

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DonorPerfect 10.50 (10/6/2010)

As this was a major release, there was a full release announcement instead of release notes.

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DonorPerfect 10.10 Release Notes (8/2/2010)

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Reports Overwritten in 10.10

- Linear List
- Solicitation Analysis Report
- Delinquent Aging Report

Modifications

Improvements in Version 10.10

- Added a warning message that appears when a user tries to delete a pledge that has payment records. If the user opts to delete the pledge anyway, the payments will remain in the system without a link to the parent record.
- Improvements were made to the Gift Scanning module to eliminate the reappearance of gifts from a deleted batch.
- When a contact record is linked to an event, the Event Status field in the contact record was previously editable, but did not update the status. Now, however, users can click the Status button that was added to the Contact screen, make the change to the Event Status, and then click the Update Status button to update the status in the contact record.
- The Duplicate Maintenance screen now allows the primary address of the deleted record to be saved as an alternate address in the final merged record.
- Updated the help file to remove references to floppy disks in the Backing Up and Restoring Your System section. The Advanced Backup and Restore section was also updated.

- Updated the list of fields in the DP Selection Screen that is used to build selection filters.
- The Delinquent Aging Report has been modified to allow users to specify a future date for the Ending Date. This allows users to enter pledge data for a future month, and then run the report for that month, so that the future record shows up correctly.
- A new “Second Gift” calculation has been added to the Customized Calculation tab of the Calculated Fields screen. It calculates the second-to-last gift within a specified date range. This calculation is automatically updated each time a gift is entered into the system. NOTE: This calculation MUST be used with a selection filter that limits the records to a specific date range; it will generate invalid results otherwise. Add the field to your Main or Bio screen to view the result.

Corrections in Version 10.10

- When linking a contact to an event, if you answer no to “Do you want to mark as attending?” the system no longer cancels the link. In addition, the contact is now given a status of “Waiting to Reply.”
- The Linear List listing now lists linked records.
- Previously, if a user entered a gift, then entered split gifts, and then deleted the original gift record, the split gift records would become orphaned. Now, however, the first split gift will automatically be promoted to be the new parent record, and any remaining split gifts will be linked to it instead. The value of the new parent record will be set to the sum of the original split gifts.
- Printing envelopes at the same time that another user is entering split gifts no longer causes split gift information to be saved to the wrong record.
- When the number of payments for a pledge is used to calculate the billing amount for each payment, the payment amounts are now rounded up instead of down.
- When you delete an event Contact record or delete an entire donor record, the count for the number of invitees for the event is now automatically updated.
- When you change an invitee’s status to Attending from inside the Event Management module, the Response Date for the contact record is now automatically updated.
- When alternate addresses are imported using Import 1.0, the name and address fields are no longer overwritten by the primary name and address.
- Eliminated errors when selecting codes in the Moves Management sub-screen of the Contact Entry screen.
- The User Security Settings screen now prevents users from entering passwords that are longer than the 10-character limit.
- Popup windows in the Receipts screen no longer appear in front of the mouse cursor.

- When sending email using the Send Email button in the Main Entry Screen, the subject line of the email is no longer copied into the body of the email.
- Auto Import of email information from Outlook no longer fails due to case sensitivity issue when matching records.
- Corrected the calculation for Net Per \$Dollar Spent in the Solicitation Analysis Report to subtract total expenses from total income before dividing by total expenses.
- In the Event Management module, the “# Attending” and “# Invited” listed on the Event Detail Screen and the Manage Events Screen are now updated when guest records are deleted from an event using Flexible Info Generator or some other method outside the Event Management module. If the numbers do not refresh automatically, right-clicking on the selected event will allow you to refresh the calculations.

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DonorPerfect 10.09 Release Notes (5/21/2010)

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Reports Overwritten in 10.09

- Campaign Comparison report
- History List
- Info Sheet
- Summary List
- Forecast Report – Actual
- Giving Range Report
- Grant Request Tracking Report (**GRNTRACK.FRX**)

Modifications

Improvements in Version 10.09

- All references to Network Merchants have been replaced with “SafeSave Payments.”
- When adding an alternate address, the ADD2 and ADD3 fields are populated by default with data from the main entry screen.
- EZ-EFT now supports processing recurring pre-authorized payments at a reduced cost in Canada.
- When performing a mail merge, the default file type for Word documents now specifies *.doc and *.doc* in order to include Office 2007 document types.
- **GRNTRACK.FRX** is now listed in the system as the “Grant Request Tracking Report” instead of “Grntrack.”

Corrections in Version 10.09

- Eliminated issue that prevented open pledges from being listed when applying a gift to a pledge.
- Pledge fields are no longer incorrectly duplicated in gift records when EZ-EFT is used to process preauthorized pledge payments.
- Eliminated error when editing the options of the Campaign Comparison report from the Welcome Screen.
- Info Sheet listing now displays correct totals for all donors when selected immediately after the History List.
- Summary List and Info Sheet now correctly display the amount of the first gift.
- Corrected the Filter Selection Screen to restore the previous default button selection.
- Prevented the main window from stealing focus when the user is working in the entry screen tabs.
- Eliminated issue that made bi-monthly, quarterly, and semi-annual pledges show up only once a year when generating pledge payments using EZ-EFT.
- In the Listings and Mailings screen, the selection filter’s name no longer appears on the screen after the filter checkbox has been cleared.
- A new Account Batch Number field has been added to the Accounting Module, and will be used identify each batch of gifts that is posted to the accounting program.
- Memo fields that are set to “show only” are now scrollable.
- When you make a copy of an export template that contains transactional information, the transaction fields are now copied along with the rest of the export template.

- The Required Field message box is no longer incorrectly triggered for fields in the Main Entry screens that already contain information.
- Eliminated error that caused ID numbers to increment by 2 instead of 1 when adding multiple contacts from the Contacts tab of the Main Donor Entry screen.
- Using the “Update Last Contact” option in the Export to File (CSV) listing no longer creates duplicate records.
- Running the Single Printouts function from the Main Donor Entry screen twice in a row and selecting **Merge a Letter** no longer causes the program to default to **.DBF** as the default file type instead of **.DOC**.
- Accent marks are now removed correctly from constituent records, and replaced with the non-accented version of the characters, as the SafeSave Payments Gateway does not accept accent marks in records.
- The Pledge Forecast Report – Actual no longer displays zeros for amounts with seven or more digits.
- Eliminated issues with creating Gift/Pledge export templates when the first export template in the system is based on Contacts.
- Mail merge default path no longer overrides the user-selected path when performing a mail merge.
- Giving Range report no longer truncates the **Prntname()** field.

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DonorPerfect 10.08 Release Notes (3/3/2010)

Updates to System Reports

Each time you run an update, there is a possibility that it will contain an updated version of one or more Financial Reports or Listings. When that is the case, the new report files will entirely overwrite the old ones, ***including any customizations you may have made.*** Running a full update will overwrite ALL reports.

Note that DonorPerfect updates are cumulative. If you skip an update, the updates that follow will overwrite the reports from the update that you skipped. For instance, if you go from DonorPerfect 10.01 to 10.08, all of the reports that were supposed to be overwritten in 10.02-10.07 will be overwritten when you install 10.08. Please review the previous release notes (see below) for details on which reports were overwritten by previous updates.

Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frit**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.08

- Labels report

- Donors who Upgraded report
- Comprehensive Donor Analysis report
- Comprehensive Report of User Settings

Modifications

Improvements in Version 10.08

- The “Not installed or configured” error message for optional modules now directs users to the client website.
- The WealthEngine Connect feature now includes more fields, such as birth date, last gift date, last gift amount, max gift date, and max gift amount.
- The **Clear** button in the Quick Gift Entry screen has been renamed to **Cancel**.
- The **Title** field is now included in the entries in the **Thank You Address** list.
- The print message for the Comprehensive Report of User Settings has been expanded to read as follows:

Print comprehensive report of user settings? (otherwise it will print a list of users and groups).
- The “**Batch Blah Blah**” setting under Report Sub-Menus, a leftover placeholder, has been removed from the Comprehensive Report of User Settings.

Corrections in Version 10.08

- Autocalc fields now include Split Totals.
- Report title field removed from default Label format.
- Currency formatted text fields no longer display asterisks instead of digits when a comma is used as the decimal point, and a period is used as the separator.
- Clicking the **X** in the top right corner while doing a quick gift entry no longer causes an incomplete entry to be created.
- The Donors who Upgraded report now displays “Upgraded Donors – All Types” in the title of the report, instead of “Downgraded Donors.”
- The **VDATE** field is now automatically added to the Other Info screen during the update, if it is not already present.
- The End of Year Letter mail merge now correctly handles fields which get their values from coded pull-down lists.
- The Comprehensive Donor Analysis report now displays the correct retention rate, calculated using the number of active donors in the previous year, instead of the current number of active donors.
- Eliminated Reports Listings error message when selecting a city from a list of coded entries while a selection filter is in place for the **CITY** field.

- The outdated **7VFIELDS** program is automatically deleted by **DPWV.EXE** during startup if it exists.
- The **Export to File (CSV)** function no longer produces a different number of fields when the Email Type option is selected.
- The **Export to File (CSV)** function now correctly exports the descriptions of coded fields instead of the codes themselves.
- When processing thank you letters, custom labels are now available from the list of labels to print.
- Saved filters that contain dates no longer produce incorrect results when running the **Count Records** listing.
- The standard fundraising filter “Reactivated Donors” now prevents first-year donors from being selected by the filter.
- Corrected performance issues when accessing the Pledge List screen.
- Sorting by “Alpha” in the Pre-Authorization Module no longer triggers an error.
- Eliminated issue that prevented the **Created By** and **Create Date** fields in the DPADD and DPPHONE tables from being updated when a donor is added from screens other than the Search/Main Entry Screen.
- When a contact record is created from within the Event Management module, the **Assigned To** field is now filled in with the correct information selected by the user.
- When multiple consecutive soft credits are entered for a gift, the linked name from the first soft credit is no longer erroneously entered for the other soft credits.
- When the Import module updates a constituent record, the system will now correctly identify and update the phone number records.
- When a contact record is created from within the Event Management module, the Event Name for the event is no longer replaced by the code from the contact’s **Assigned To** field.
- Eliminated error when users preview the Comprehensive Report, then exit the preview and run the End of Year Letter mail merge.
- When users click the Link Name to Gift button but attempt to cancel out of the form before selecting a donor to link to, they now receive a warning message that no name has been entered.
- When users use the Entry Screen Parameters screen to add a new field to the list of searchable fields in the Search screen, the table prefix is now automatically entered for the new search field.
- The Event Module now functions correctly with selection filters that use the OR operator to refer to records from two different tables.
- The Event Module now allows users to set certain Event Module fields to be Required Fields.

DonorPerfect 10.07 Release Notes (11/18/2009)

Updates to System Reports

Each time you run an update, there is a possibility that it will contain an updated version of one or more Financial Reports or Listings. When that is the case, the new report files will entirely overwrite the old ones, ***including any customizations you may have made.*** Running a full update will overwrite ALL reports.

Note that DonorPerfect updates are cumulative. If you skip an update, the updates that follow will overwrite the reports from the update that you skipped. For instance, if you go from DonorPerfect 10.01 to 10.08, all of the reports that were supposed to be overwritten in 10.02-10.07 will be overwritten when you install 10.08. Please review the previous release notes (see below) for details on which reports were overwritten by previous updates.

Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frit**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.07

- Deleted Names Report
- Export to File (CSV) Listing
- Giving Potential Report
- Giving Range Report

Modifications

Improvements in Version 10.07

- Phone numbers and email addresses are now passed from the constituent record to the Gateway when an account is created on the Gateway.
- A single confirmation is now displayed prior to deleting a code, instead of the previous method, which displayed two messages.
- The “Potential Size” column of the Giving Potential Report is now labeled “Potential Size (Difference between Actual Size and Potential)” for clarity.
- Added DPDONATE program to run the donate.net import module for those clients that have it.
- When a customer adds a reciprocal link code to the system, the RECP field will now be pre-populated with a list of the available link codes. This allows customers to easily select codes from the list, or add a code to the system.

- When using the **Send to Outlook** button from the Contact screen, **events@donorperfect.com** is no longer automatically entered in the Organizer field.
- The White Pages Lookup button in the main entry screen now automatically passes address info from the donor record to WhitePages.com when clicked.
- When using the Export to File (CSV) function with Contact and Other Info records, the date exported will be the Due Date for contacts, and the Date Worked for Other Info records.
- Updated online help file now contains hyperlinks to related documents and videos in the Document Library of the DonorPerfect Website's Client Area.
- When copying an export template in the Export Templates screen, the copy of the template is automatically opened for editing.
- When the "Add New Template" button in the Export Templates screen is clicked, the template type is automatically set to "Main/Bio."
- If an export template is added or edited from the Listings screen, the Template Type is automatically set to the selected transaction type and cannot be changed.

Corrections in Version 10.07

- Changed the Base Field combo box in the Giving Range Report to a dropdown list to prevent users from entering illegal values.
- When a user clicks the Print Report button, and prints a transaction-based custom report such as the Gift/Pledge Report from the main entry screen, they now receive a message that the report cannot be run from that screen. Previously, the system would run the report with only the most recent transaction for that donor.
- If the user prints a transactional report from the relevant entry screen (running the Gift/Pledge Report from the Gift Entry screen, for instance), the user now receives a message asking if they want to "Print the current transaction only."
- Using the Screen Generator, the user can now set fields on the Linked Gifts and Initial Payment Quick Entry screens to be required fields.
- Eliminated problems with split gift entry on computers with monitor resolution of 800x600 or lower.
- Corrected problem that prevented headers from appearing in exported data files if DP.DONOR2 was the only Main/Bio field selected.
- Eliminated error when a gift is edited immediately after using the Print Report feature.
- Restored user-entered headings in Top Donor Listing report.
- DonorPerfect no longer exports all phone entries when **getphone ("F")** or **getphone("H")** or **getphone("W")** are added to an export template. Now only the indicated phone entry is added to the export data file.

- Corrected the function that creates the 8 character Canadian ABA number in the Insta-Charge/EFT setup screen.
- Improved performance of Export to File (CSV) function.
- Eliminated duplicate events in Event module if SOLICITOR codes are identical to SOL codes.
- Improved performance when processing receipts.
- Improved performance when updating a batch.
- Batch processing no longer includes deleted records in batch history.
- Deleted Names Report now obeys selection filter settings.
- Corrected problem that prevented the EZ-EFT module (SofterWare Gateway version) from automatically updating pledge balances when payments are made.
- Eliminated error that prevented users from previewing or creating gifts using the older version of the EZ-EFT module and DonorPerfect 10.06+.
- Corrected LSO-DT field in Other Info to be based on the Last Vol Date field, not the date on which the entry was made.
- Eliminated error when deleting a payment made through EZ-EFT (SofterWare Gateway version)
- Prevented system from locking out other users in a multi-user system upon completion of the Import process.
- Removing a field from the Scanning Gifts screen now removes it from the Default Values screen as well.
- The Suppress Professional Title option in the Mail Merge screen has been fixed.
- Corrected performance issues when using user-defined fields in the Search Records Look-Up screen.
- Corrected formatting issue with phone numbers on the Insta-Charge form.
- Resolved errors when using a selection filter with the “never equal to” operator with either Export to File (CSV) or QuickExport.
- Corrected error in Other Info VTOT field that doubled the number of hours when the Done button was clicked.
- Corrected problem in Export to File (CSV) screen where a file like **dpexport.txt** would be spontaneously renamed to **dpexport.csv**.
- Eliminated error when user edits a gift record, then uses the **Done** buttons to exit to the main screen.
- Listings and mailings now have the ability to display alternate language description fields, if present.

- Restored the ability to switch between different transaction tables when creating an export template.

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DonorPerfect 10.06 Release Notes (8/24/2009)

Updates to System Reports

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Running a full update will overwrite ALL reports.

Note that DonorPerfect updates are cumulative. If you skip an update, the updates that follow will overwrite the reports from the update that you skipped. For instance, if you go from DonorPerfect 10.01 to 10.08, all of the reports that were supposed to be overwritten in 10.02-10.07 will be overwritten when you install 10.08. Please review the previous release notes (see below) for details on which reports were overwritten by previous updates.

Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frt**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.06

- Cash Flow Projection Report
- Comprehensive Donor Analysis Report
- Counter Report
- Function Key Report
- Gift Listing with Soft Credits
- History List
- Membership Roster

Modifications

Improvements in Version 10.06

- Calendar button added to Contact Management Reports screen, allowing you to access an interactive version of the contact calendar.
- Pledge Total now updates MCAT value.
- Donor ID field added to Cash Flow Projection Report.
- Import Module functionality has been expanded.
 - Import no longer re-indexes the entire system, just the tables that changed.

- Option added to initiate DonorSync after an import.
 - Default values for the checkboxes on the Import Complete screen can now be set from the Specify Import Options screen.
- Added two new attrition statistics to Comprehensive Donor Analysis Report:
 - **Number of Donors Active Last 2 Years** (Count of all donors who gave this year AND last year)
 - **Number of Donors Active Last 3 Years** (Count of all donors who gave this year, last year, and two years ago)
- Counts and totals added to SofterWare Gateway EFT Transaction reports.
- Select All options added to SofterWare Gateway EFT module grids.
- Gift Listing with Soft Credits now sorts by donor name instead of Donor ID.
- When **Emails** is selected in the Report Category of the Listings and Mailings screen, the “Suppress Professional Title” and “Sort Order” options are now disabled.
- The Counter Report now displays the number of codes entered into the system for the chosen field.
- Updated online help file and user manual PDF.

Corrections in Version 10.06

- Corrected column names in pledge forecast report export.
- Eliminated false “No Names Found” error in Legacy Event Reports when reports are re-run.
- Screen Generator now correctly detects if a coded field has been set up as both Multi-Entry and Show Description (not allowed).
- Corrected “Update Last Contact” function in Export to File (CSV) listing.
- Event Management Module now updates Current Count for tables when a donor’s status changes to “Not Attending.”
- Eliminated error in Event Management Module which prevented a guest from automatically being assigned to the same table as the donor they are accompanying.
- Function Key Report now lists functions for SHIFT+F9 and CTRL+F9.
- Barcode Labels report now generates delivery point labels with 5-digit zip codes when a full 9- or 11-digit Zip code is not provided. If no Zip code is provided, barcode labels are not printed.
- In the Code Maintenance screen, the cursor is automatically placed back into the Code field after a code is added or edited.
- Corrected full format export to Excel from the Membership Roster report.

- Eliminated error in Contact Listing when a selection filter containing double quotes is used.
- Eliminated index error when running Board Roster from Custom Report Generator.
- Eliminated “EFT is not found” error when applying a payment to a pledge in a non-EFT system.
- Improved performance of Duplicate Maintenance features.
- Eliminated issues when converting large numbers to scientific notation in financial reports.
- Soft credit fields are no longer assigned incorrect values when a soft credit is linked to an honorarium.
- History List no longer displays incorrect messages when used with a selection filter containing the Never Equal To condition.
- Eliminated error code when adding a field to an export template more than once.
- Resolved issue with clearing the Quick Entry module transaction list for multi-user systems.
- Batch reports no longer suffer from heading mismatch when a data column is completely blank.
- Users with Read-Only access are no longer prevented from viewing pictures in the Main Entry Screen.
- Eliminated errors when running DP-generated reports from the dashboard.
- Eliminated error in Export to File (CSV) when the gift solicitor field (**dpgift.gsolic**) is used to share codes with the Solicitor field in the Main table.
- Most Recent Gift field now recognizes pledge payments as gifts.
- Constant Contact correctly replaces the existing template (if any) when a new Constant Contact export template is created.
- Moves management plan data no longer incorrectly shows up in other plans.
- Corrected error in Export to File when Main/Bio template was selected.
- Comprehensive Donor Analysis Report displays correct number of retained donors.
- Eliminated error message when adding new guests to Event Management Module.
- Export to File no longer triggers error code when using a selection filter that filters against fields from a table other than Main/Bio.

DonorPerfect 10.05 Release Notes (5/22/2009)

Updates to System Reports

Each time you run an update, there is a possibility that it will contain an updated version of one or more Financial Reports or Listings. When that is the case, the new report files will entirely overwrite the old ones, ***including any customizations you may have made.*** Running a full update will overwrite ALL reports.

Note that DonorPerfect updates are cumulative. If you skip an update, the updates that follow will overwrite the reports from the update that you skipped. For instance, if you go from DonorPerfect 10.01 to 10.08, all of the reports that were supposed to be overwritten in 10.02-10.07 will be overwritten when you install 10.08. Please review the previous release notes (see below) for details on which reports were overwritten by previous updates.

Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frt**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.05

- Contact Listing
- Comprehensive Donor Analysis Report
- Deleted Names Report
- Moves Management Campaign Analysis Report
- Moves Management Campaign Comparison Report
- Pledge Link Report
- Solicitation Renewal Report

New Report

- DonorPages Fundraising Listing by Team

Modifications

Improvements in Version 10.05

- An upgraded version of the EZ-EFT Module has entered beta testing. The new EZ-EFT Module uses the SofterWare Gateway for transaction processing. The SofterWare Gateway is a PCI-compliant financial transaction processing gateway that provides a number of new features, including secure storage of account information, and the ability to process ACH transactions that draw funds directly from bank accounts, in addition to credit card accounts.

- Added the ability to link gifts to Soft Credits, Notifications, etc. from the Quick Entry screen.
- Added a new “DonorPages” classification of reports to the Financial Reports screen.
- DonorPages financial report added: “Fundraising Listing by Team.” This report lists individual donations received, grouped by team and team member.
- Contact Listing report now able to include contact records that do not have Due Dates specified.
- The Import Module now allows you to import payment methods from WebLink.
- When exporting data to an **.xls** file, leading zeroes in ZIP codes are no longer dropped.
- The Flex Info screen now allows you to select a table from outside the default DP folder.
- Added “New Donor Retention Rate” and “Revenue per Retained Donor” calculations to Comprehensive Donor Analysis Report.
- Credit card data for existing CheckFree EFT customers is now encrypted.

Corrections in Version 10.05

- Corrected typo in Table/Team Report description.
- Eliminated Error Code 12 when creating a gift after import of DonorPages data.
- Eliminated bug when adding a soft credit to a split gift.
- Users can no longer add a soft credit to or split gift to a gift record that is already linked to another soft credit/notification/matching gift.
- The Import Module can no longer import records with Donor IDs that have already been deleted from the system.
- Changes to split gifts now update modification dates for the records correctly.
- Added validation to Import module to check for address data when inserting new donor records.
- Export to File (CSV) no longer ignores filter criteria based on fields from the **DPPHONE** table.
- Eliminated error when exporting Year-To-Date fields with the Export to File feature, and using a file type other than **.CSV**.
- Global Delete function no longer has issues when operating on non-DP tables.
- Eliminated error code when transferring DP gift records to QuickBooks using Accounting Module.
- Import Module no longer generates an error when the “Codedate” field is imported into the DPCODES table.

- Export templates no longer truncate Boolean fields.
- Flexible Info Generator no longer ignores selection filters when Alpha sort option is selected.
- Last Update field on main data entry screen is now updated correctly when linked gifts are created.
- Corrected issue in Moves Management Financial Reports where gifts linked to the moves management plan triggered an error.
- Export to File using an Email type export template now exports multiple email addresses when present.
- Export to File now accepts filenames that contain spaces.
- Entering a description for a blank code field no longer triggers an error in the Moves Management module.
- Event reports no longer include deleted event codes.
- Corrected problem with the Email icon hyperlink on the main data entry screen.
- Pledge Link Report no longer displays the value from the “Title” field in the “Professional Title” field.
- Corrected issue in Group Email function that caused only the first email recipient in the list to be sent an email.
- Corrected error in Export to File that caused records marked NOMAIL to be exported when inclusive selection filters were used.
- Program automatically removes table name from any field that is added to the main data entry screen.
- Deleted Names report modified to use correct fields.
- EFT fields are no longer cleared when a pledge record is duplicated.
- “Print All” option now works properly with contact reports.
- Eliminated numeric overflow during batch update process.
- The Solicitation Renewal Report no longer contains links to blank pages in the “Counts” column headings.
- Eliminated Invalid Field message when removing a table name from a field in an Export Template.
- Corrected performance issues in Contact Manager.
- Eliminated error in Custom Report Writer.

DonorPerfect 10.04 Release Notes (3/24/2009)

Updates to System Reports

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Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frt**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.04

- Export to File Listing
- Pledge Link Report
- Recency by Frequency Report
- Monthly Solicitation Report
- Contact Manager Report
- Campaign Analysis Report
- Top Donor Listings
- EOY Form
- Comprehensive Donor Report
- Comprehensive Donor Analysis Report

Modifications

Improvements in Version 10.04

- Added Cancel button to Apply Gift to Pledge screen
- DonorSync process automatically launches after import (DonorPages users only)
- Added option to manually initiate DonorSync (DonorPages users only)
- Append 'D' Prefix to Client ID field in the About DonorPerfect screen

- Remove the "Pledges are not counted..." message when Include Pledges is Checked in Comprehensive Donor Report

Corrections in Version 10.04

- Corrected "Include All Addresses" option in Exports to File
- Corrected error in Financial Reports: Pledge Link Report if Pledge Date is outside of Date Range
- Resolved errors in Recency by Frequency Reports
- Eliminated error when printing the Financial Reports Monthly Solicitation Report
- Eliminated error when printing the Contact Manager Report
- Corrected issue with Email Type in Export Templates
- Updated Campaign Analysis Report to use "Campaign", "Goal"
- Corrected error in Financial Reports Top Donor Listings
- Resolved issue when user exits application from Flex Info screen
- Corrected Financial Reports: EOY Form to obey "Address" filters
- Corrected error with Duplicate Maintenance when using the "Combine by Scanning" Option to Merge Records
- Resolved issue with inactive codes appearing in Moves Management screen
- Corrected header descriptions in Comprehensive Donor Analysis Report
- Corrected issue with Link Name to Gift Button
- Resolved issue with renumbering after deleting a field from an Export Template
- Updated Monthly GL Report Description

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DonorPerfect 10.03 Release Notes (1/13/2009)

Updates to System Reports

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Reports Overwritten in 10.03

- End of Year Letter (Merge) Form
- Pledge Billing Report
- Income Analysis Report
- End of Year Letter (Word Merge)
- Consolidated Notification Letter
- Moves Management Report

Modifications

Corrections in Version 10.03

- Corrected error when associating a filter with the Financial Reports EOY Letter (Merge) Form
- Corrected selection filter bug where the **Exclude Non-Gift** box was left unchecked when filtering for **dpgift.rectype = "G"**.
- Corrected error in Pledge Billing Report column headings
- Corrected error in Financial Reports Income Analysis Report when running the report with or without a filter
- Corrected error in End of Year Letter (Word Merge) when filter is based on a coded field from the Main table
- Corrected error in End of Year Letter (Word Merge) that prevented the description for codes from displaying in the merge document
- Corrected errors when associating a filter with the Financial Reports Consolidated Notification Letter
- Export Template functions now save properly
- Switched the "Completed Date" and "Due Date" headings in the Moves Management Report so that they are over the correct columns
- Phone numbers now match the correct donor in the Moves Management Report
- Corrected error in Financial Reports that prevented the Build New Selection Filter screen from showing the gift table
- Corrected errors in Consolidated Receipting/Canadian Receipting

DonorPerfect 10.02 Release Notes (12/29/2008)

Updates to System Reports

Each time you run an update, there is a possibility that it will contain an updated version of one or more Financial Reports or Listings. When that is the case, the new report files will entirely overwrite the old ones, ***including any customizations you may have made.*** Running a full update will overwrite ALL reports.

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Reports Overwritten in 10.02

- Expense Report

Modifications

Improvements in Version 10.02

- Quick Entry- Added ability to edit previous entries
- Added ability to recalculate dpbataud table
- Restored access to v8 Acknowledgment Processing batches
- Added ability to modify standard search fields for Lookup screen
- Added Grand Total for All Expenses to the bottom of the Event Expense Report

Corrections in Version 10.02

- Corrected issues with the General Ledger Reports from Reports/Financial Reports
- Corrected issues with data only export from the Balance Due report
- Corrected bugs in Go to Linked Record Button in the Link Tab
- Deleting a Winning Bid does not update the "Sold" status to "N" in the Event Module
- Billing Amount is no longer updated if Number of Payments is modified

- Corrected bug with Printer Icon in End of Year Report (Gift Select Filter shows wrong fields in list)
- Corrected performance issue in Financial Reports/Comprehensive Report
- Corrected Moves Management filter error
- Removed error when User Selects the GL fieldname in Code Maintenance
- Corrected issue in Export to File(CSV) (the first phone number in the file is repeated for all subsequent donors)
- Corrected issue with Export to File Headers (When a large number of fields are selected, header row wraps)
- Corrected issue in Export to File (csv) – Selection filter was ignored for transaction export options
- Corrected issue in Event Module Guest Detail screen: Guest Name Reverts to Constituent's Name when creating a New Table

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DonorPerfect 10.01 Release Notes (11/24/2008)

Updates to System Reports

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Note that DonorPerfect updates are cumulative. If you skip an update, the updates that follow will overwrite the reports from the update that you skipped. For instance, if you go from DonorPerfect 10.01 to 10.08, all of the reports that were supposed to be overwritten in 10.02-10.07 will be overwritten when you install 10.08. Please review the previous release notes (see below) for details on which reports were overwritten by previous updates.

Your old reports can be retrieved. During the update, any reports that are overwritten are first copied to a sub-folder named **Reports10**. There are usually three files, one each with the extension **.frx**, **.frt**, and **.mem**. Copy them to the main DonorPerfect folder and you can use your old report again.

Reports Overwritten in 10.01

- Contact Listing Report
- Guest Report
- Event Analysis Report
- Historical Comparison Report
- Invitation Aging Report

- Table/Teams Report

New Report

- Pledge Invoice Report

Modifications

Improvements in Version 10.01

- New Report: Pledge Invoice Report
- The Welcome Screen is always visible now when no other screen is open.
- In the Set Defaults screens under Utilities, you can now clear all default setting fields with a single action.
- Double-clicking on a row in the Review tab of the Event Management Add/Edit Event screen checks the checkbox for that row.
- Edit links for each guest have been added to the Event Management Table/Teams screen. Clicking the Edit link opens the guest details screen for that guest.
- In the Event Management Table/Teams screen, exceeding the maximum table size now triggers a warning and turns the field red, but allows the user to add the guests to the table anyway.
- In the Event Management Table/Teams screen, you can now add a table/team captain when viewing all tables.
- The Print Labels setting in the Acknowledgements Processing form can now be set to checked or unchecked by default in the Batch and Report Parameters tab of the Reports and Mailings Parameters screen.
- The Contact Listing Report now has an "Include Completed Items" checkbox that allows you print a listing of completed contacts.
- If Moves Management Plan or Action Titles fields are selected in the Entry Screen grid, they are displayed as the contents of memo fields.
- Added "Seat With" field to Table/Teams Event Report.
- Added Total number of tables/teams to Tables/Teams Event Report.
- Event Guests Report now identified Pledge vs Gift includes # of Invitees column.
- Export to File listing excludes templates with blank names from the selection list.
- Updating a gift record now also updates any related soft gift records.
- Notes added to the Historical and Invitation Aging Event Reports that define the Total Revenue column.
- New calculated fields added to the system, providing totals of pledge payments plus non-pledge payments, pledge payments, and all pledges.

- When a user enters a winning bid on an auction item in the Event Management module, the Gift Type and Thank-you # for the bid are cleared so that the user can select the appropriate values.

Corrections in Version 10.01

- Applying a payment in the Pledge screen now copies fields from the pledge record to all relevant fields in the gift record.
- Adding a soft credit in the Pledge screen now copies fields from the pledge record to all relevant fields in the gift record.
- Fixed disappearing Link to Gift buttons when a subscreen is selected in the Contact screen.
- Users can now create copies of custom reports that were created using the "Designer" option.
- System no longer opens a spurious Open Table screen after a Global Delete.
- Eliminated Numeric Overflow error when running the Event Analysis or Event Historical reports before constituents have been added to an event.
- Eliminated error in Event Management Modify Event Screen when selecting the Make Payment option and clicking the Preview button.
- Eliminated error in Single Printouts form when Custom Report is selected on a system with no custom reports set up, and the Merge Letter option is selected.
- Fixed poor performance using Export to File (CSV) with transactional templates.
- Eliminated problem when reselecting the Activity field in the Contact Entry Screen Grid.
- Fixed missing payment entries when adding split gifts.
- Fixed problem with Export Template Management screen only loading the first field from templates created in Version 9 and previous.
- Event Module no longer ignores the "Do Not Duplicate Invitations" option on the Invitations tab.
- The Filter for All Calculated Fields parameter on the General tab of the Calculated Fields screen is no longer ignored when the "Include Pledges in Financial Reports" parameter is enabled.
- The Consolidated Notification Letter and End of Year Letter templates are no longer omitted.
- The Create Contact function in the Event Module no longer uses the first donor name in the system for all new constituent records.
- The "Pledge + Gift" column on the Gift History screen #2 no longer include Soft Credit and Notification records.

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