8.2A Release

To get the latest version, go to the File menu in your program and click **C heck for Program Update**. Or, just click **Download Now**.   Download Now

We recommend updating to Formation Office 8.2A, which offers the following enhancements.

Quick Links
 • New Features • Improved Features • Corrections

New Features

Notify and Dismiss Other Program Users ♀You Voted ♀You Voted ♀You Voted ♀You Voted ♀You Voted

✓ With the right permissions, you can send a message to other program users. This displays to those currently using the program and to those who open the program once you send the message. You can also force users to exit if you need exclusive access to, for example, run a process that alters data.
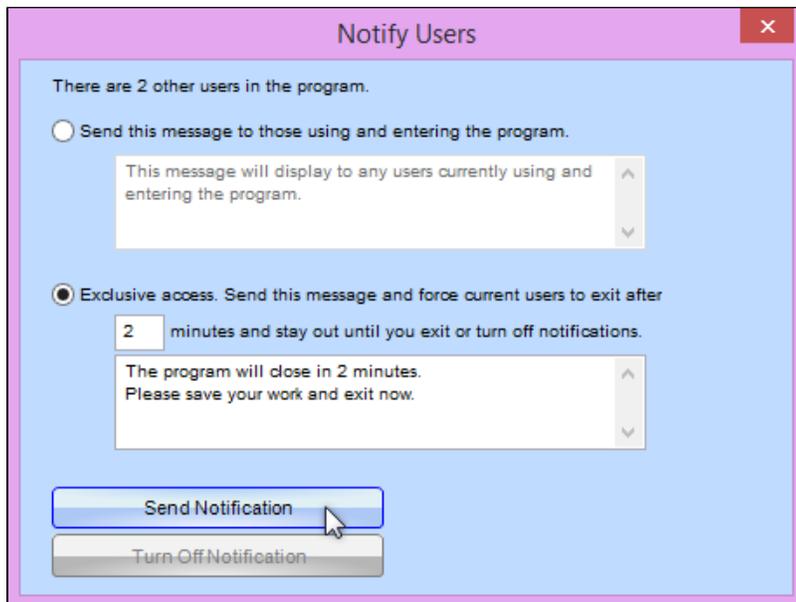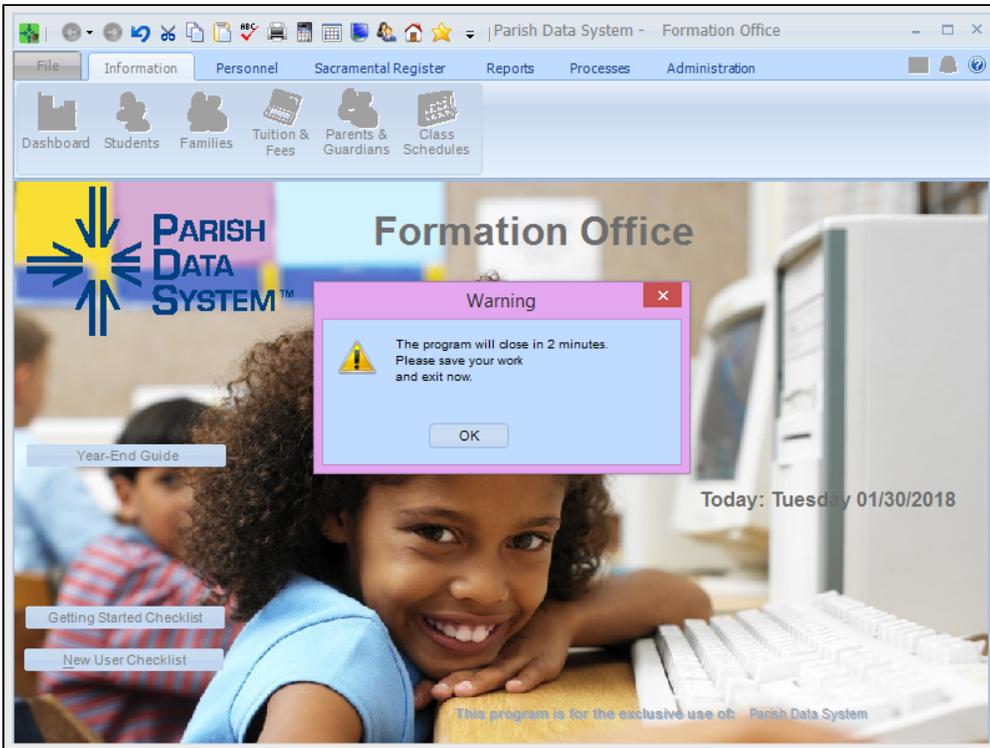
✓ For details on setting and using this feature, see View User Activity.

New Student Attendance Totals Report

✓ We added a report that lists students by grade with the totals for each attendance category.

Parish Data System
Attendance List for Class: 1st Grade Formation

Catechist:	Mrs. Mullins			Room:	30		Date Range: 10/01/2016 - 06/30/2017		
	Mrs. Adler								
	Mrs. Wylie								

Student Name	ID Number	Absent	Excused	Unexcused	Half Day Absent	Half Day Excused	Half Day Unexcused	Tardy
Cochrane, Seth	147	1	0	0	0	0	0	0
Diaz, Martha *	102	0	0	0	0	0	0	0
Flores, Reuben	34	1	0	0	0	0	0	0
Lynch, Elizabeth (Lizzy)	68	1	0	0	0	0	0	0
McCain, Laura	175	1	0	0	0	0	0	0
Owens, Rebecca (Becky)	188	1	0	0	0	0	0	0
Pace, Sam	132	1	0	0	0	0	0	0

View and Modify Batches You Voted You Voted You Voted

✓ We added an area where you can view all financial batches including those posted during Payment /Donation Entry, Fee Entry, Terms/Rates Entry, Pledge Card Entry, as well as those imported from EFT companies.

Move Fund Entries
Move posted fund entries from one date to another.

Delete Batch
Delete an entire batch of fund entries at once,
including fund history, rate, and EFT information.

New Year Fund Setup
Set up new fund periods for existing funds.

Carry Forward Balances and Prepayments
Carry forward balances and prepayments into a new
fund period.

View Batches
Easily view Batches, make changes, and reprint batch reports.

✓ With the right permissions, you can modify transactions in a batch, add a new transaction, or delete a transaction. You can also delete the batch, if needed.

✓ Once you save your changes, you can leave an audit trail. If you click Yes, the original transaction is retained but the check number is changed to "Mistake". This works like EFT-Error and excludes the amount from financial totals. Then, a second transaction is added with your changes. If you click No, the original transaction is changed or deleted. You can see a note about the change in the Comments field of the transaction. The change is also noted in the User Log.

✓ On the Tuition & Fees window, click **Processes** > **View Batches**. For details and steps, see View and Modify Batches.

New Option to Match Vanco Report

✓ We added a report option in the eGiving quick posting. Entries are sorted by date and account type to better match the reports you get from Vanco.

Parish Data System
eGiving Posting of Payments/Donations - Batch Number:

Sorted by: Account Type and Date
Date: 01/31/2014 Checking/Savings Transactions

ID/Env	Family Member Name	Fund	Date	Activity	Amount	Type	Acct
96	Campbell,Robert(Esther),Mr. &	4-10	01/31/2014	Pledge Payment	$100.00	Checking	**7123
199	Jeffords,Jimmy(Joan),Mr. & Mrs	4-10	01/31/2014	Pledge Payment	$50.00	Checking	**9123
284	Wilson,David(Cathye),Mr. & Mrs	4-10	01/31/2014	Pledge Payment	$50.00	Savings	**2359

Number of Entries Posted: 3   Payments/Donations Total: $200.00

Sorted by: Account Type and Date
Date: 01/31/2014 Credit Card Transactions

ID/Env	Family Member Name	Fund	Date	Activity	Amount	Type	Acct
19	Alvarez,Alfred(Linda),Lt.Mrs.	4-10	01/31/2014	Pledge Payment	$100.00	Credit	
160	Felder,Jimmie(Victoria),Mr. &	4-10	01/31/2014	Pledge Payment	$50.00	Credit	

Number of Entries Posted: 2   Payments/Donations Total: $150.00

Sorted by: Account Type and Date
Date: 02/07/2014 Credit Card Transactions

ID/Env	Family Member Name	Fund	Date	Activity	Amount	Type	Acct
108	Allen,Scott,Mr.	4-10	02/07/2014	Pledge Payment	$100.00	Credit	

Number of Entries Posted: 1   Payments/Donations Total: $100.00

Fund		Number of Payments/Donations	Total Paid
4-10	Pledge Drive		
	Payments/Donations:		
	Pledge Payment	136	$14,983.32
		------	----------
	Pmt. Average: $110.17	136	$14,983.32

Grand Total All Funds: $14,983.32
========

Summary of Account Type:

|		==== Checking ====		===== Savings =====		===== Credit Cards =====	
Fund		Number	Total Paid	Number	Total Paid	Number	Total Paid
4	Pledge Drive	30	$3,650.00	27	$3,683.32	79	$7,650.00
		-----	----------	-----	----------	-----	----------
	Total:	30	$3,650.00	27	$3,683.32	79	$7,650.00

Number of Entries Printed: 1

Log Reasons for System Processes

✓ Now, you can log a reason for change when you run a system process from the File menu.

✓ This reason displays on all affected records. Go to the record, and click **Reasons for Changes** on the left.
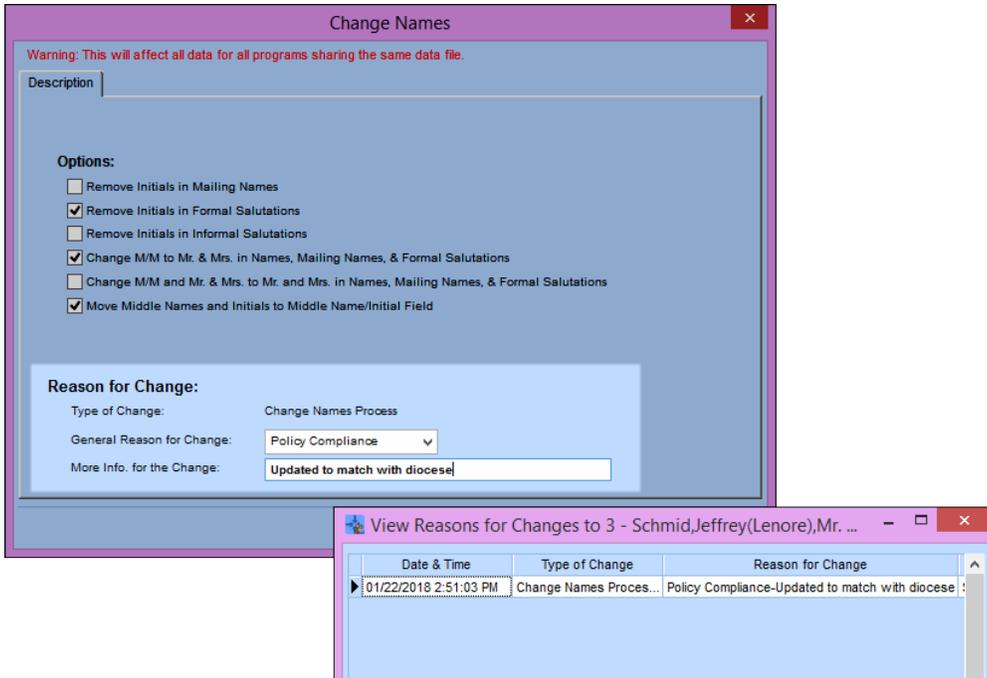
Export to QuickBooks Online ⚲You Voted

✓ We added an option so you can export your totals to QuickBooks Online. Select the **Online** checkbox, and the format changes to match the required 3 column format.
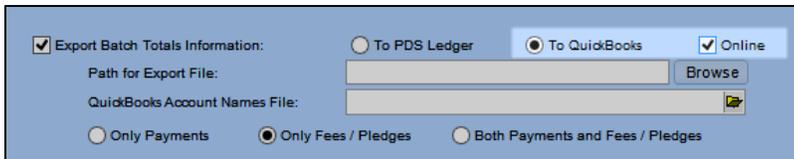
List Student Attendance in Letters ⚲You Voted

✓ We added a new list that can be used in reports to display student attendance.
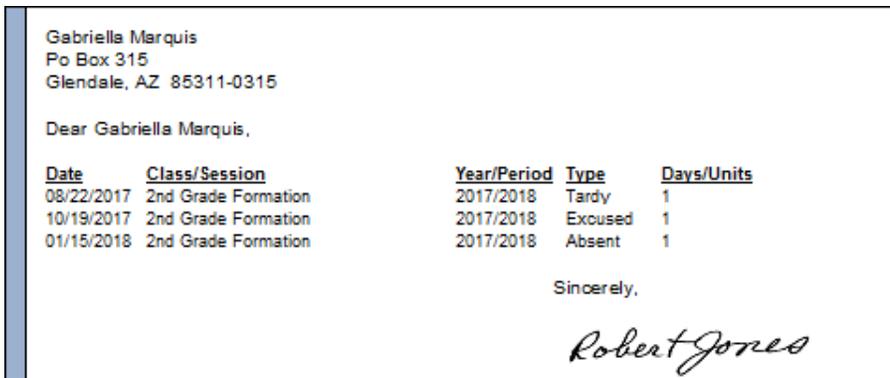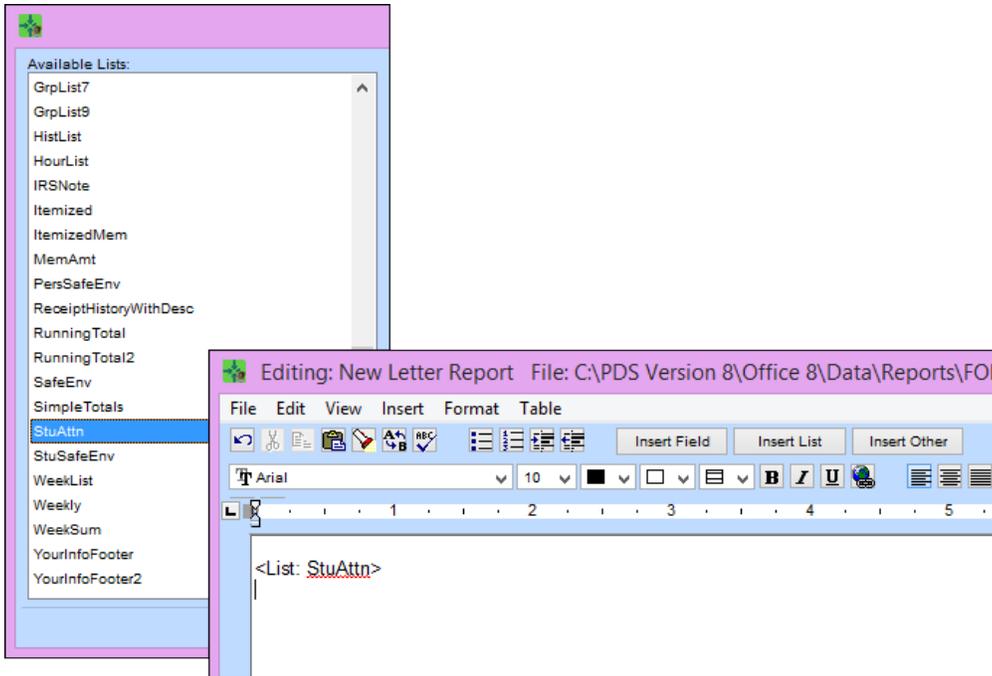
New Shortcut Key for 'Find'

✓ Now you can use the Ctrl+F shortcut key to open the Search dialog box. In any window where you can search for records, hold down the **Ctrl** key then press **F**.

✓ You can also use this to open the Find dialog box in Reports.

Warning when Deleting a Family with Funds

✓ If you try to delete a family who currently has funds, now you'll see a warning that lists their fund periods. That way, you can make any necessary changes before deleting the family.

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Improved Features

Search Saved Selections and Additional Selection Fields 🎗You Voted

✓ We added a Find button in the list of saved selections. This works just like the Find feature in the Reports list.
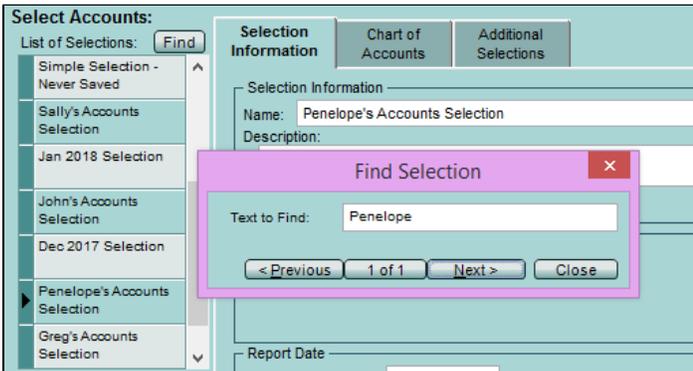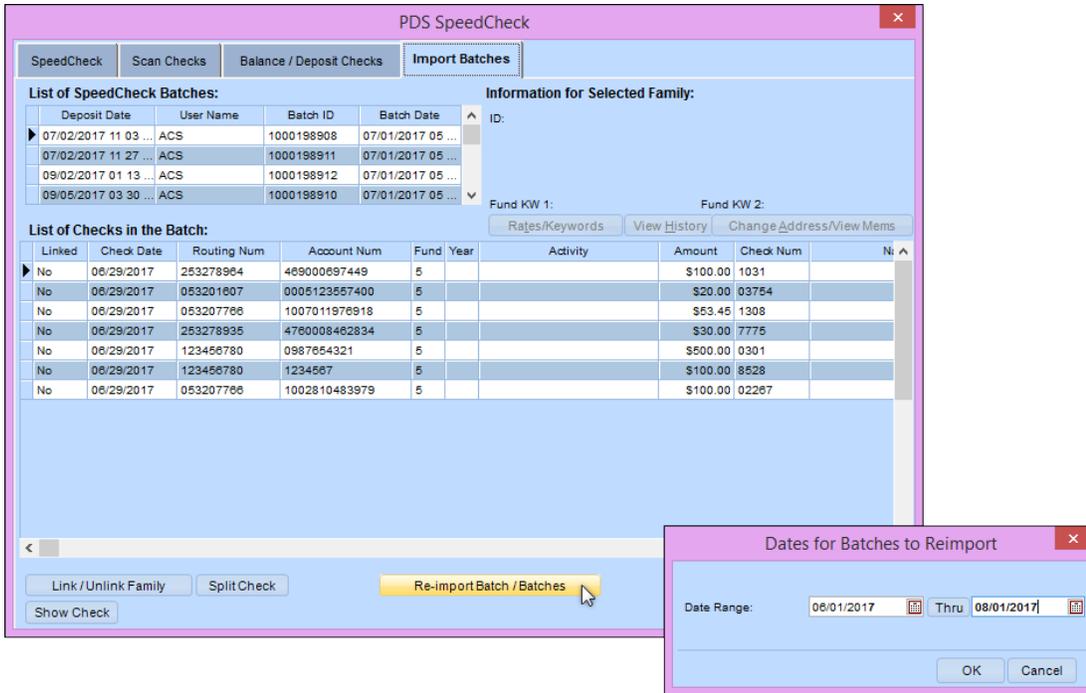

✓ You can also search in the list of additional selection field names. On the Additional Selections tab, click to add a new condition. Then hold down the **Shift** key and press **?** to open the Find dialog box.
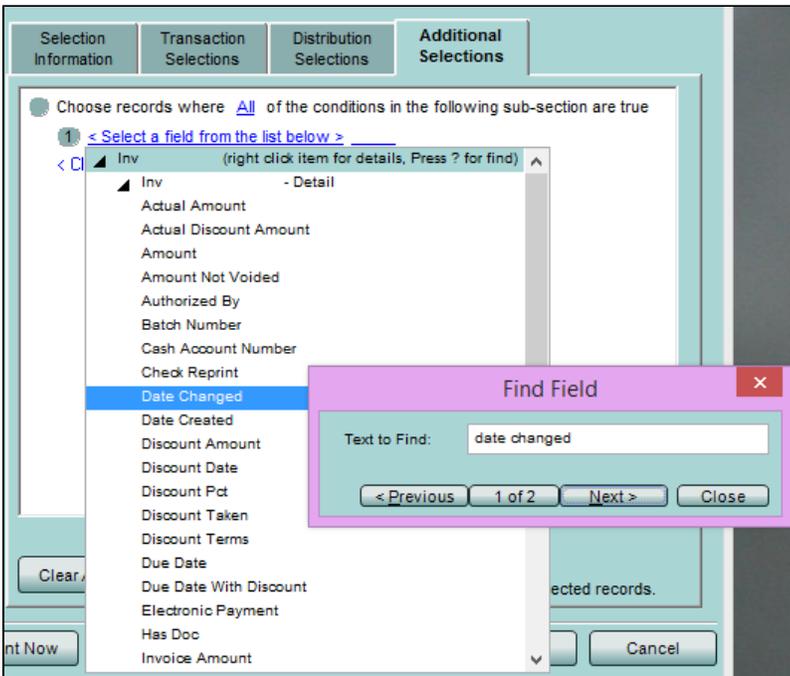
Re-import SpeedCheck Batches

✓ If needed, you can re-import batches within a certain date range into SpeedCheck.

Print Member Name on Confirmation Certificates

✓ We added options on confirmation certificates to print the confirmation name or the member name as it displays on their record.

Tutorial Videos

✓ Now, the video icon [▶] displays in the top-right corner of every window (beside the notification bell and help icons). Click it to go to the PDS Training Library on the Client Portal. From there, you can select and view video tutorials for your program.

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Corrections

We fixed the following issues that affected some of our clients.

- The list of Classes/Sessions drop-down list now shows in alphabetical order within the current year /period. You Voted
- We changed the postage statement format from bitmap to jpg so they print a little clearer.
- When uploading catechists and class information, the attendance reasons were not posting to the students.
- If you disabled all of your additional selections, reports displayed blank.
- When printing from the Sacramental Register, the notification of marriage displayed "Married To: <Sac Marriage Spouse Name>" instead of the spouse's name.
- The postage statement was not calculating the Net Postage Due when you entered a value for Postage Affixed.
- An error displayed if you used Alt+Q to search for a family that was not part of a filtered list (for example, an inactive family in a filtered list of active families).
- Using the Sacramental Register, the confirmation notification was printing baptism information.
- When adding a new family or member phone number, if you moved the mouse out of the grid, the new line disappeared.
- If your church hosts multiple sets of sacramental registers, and you added a record for another church in the register, the host church was displaying as the place of baptism instead of the selected church when the church links the member record.

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