

## Summit Central - Update Information

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**From 4.11.04 - 4.12.01 (Released March 11, 2008)**

### ***New Features/Modifications***

- Modified Join and Renew forms for improved display of long membership types.
- Added Default Address Tab on People form as a Personal Options setting.
- Enhanced sorting of People within Groups in People in Groups reports.
- Added "No Show" tracking of Summit Event Manager events. A no show is someone who was meant to participate, but did not. On import from Summit Event file, no shows can be identified. No shows can be recorded in event history and retrieved via the Reporter. No show status has also been added to the various event attendance reports.
- Added Special Diet, Primary Accompanying Person details, and Primary Accompanying Person Special Diet as columns that can be chosen on Reporter Name Plus... listings.
- Added diet and primary accompanying person information to Reporter exports.
- Cleaned up appearance of payment allocation screen.
- Simplified entry of corporate associated members when there is no limit to the number of associated members. (Corporate members form no longer needs to be closed between the addition of each new associated member).
- When sending extended information to an event file, the following additional fields are now also sent: Nationality, PassportNumber, PassportExpiryDate, CountryOfIssue, APGender, APAsianName, APNationality, APPassportNumber, APPassportExpiryDate, APCountryOfIssue.
- New macro to recalculate total amount outstanding for all records.
- Made first expiry date pull-down list on Membership Types form longer for easier selection.
- Added display of Microsoft Access environment to "Where Am I" help function.
- Modified course export to only show one line per person.
- Modified send to event and import from event functions to now include: Special Diet, Date of Birth, Gender, Smoker Flag, Accompanying Person Title, Accompanying Person Given Name, Accompanying Person Surname/Family Name, Accompanying Person Badge Name, Accompanying Person Salutation, Accompanying Person Special Diet, Accompanying Person Gender, Accompanying Person Asian Name Flag, Accompanying Person Smoker Flag, Passport Number, Passport Expiry Date, Nationality, Country Of Issue, Accompanying Person Passport Number, Accompanying Person Passport Expiry Date, Accompanying Person Nationality, Accompanying Person Country Of Issue).
- Modified display of Correspondence for better previewing under Access 2007.

### ***Fixes***

- Corrected an error where Mail Type could not be set to e-mail with a home e-mail address only.
- Corrected an error where, on completion of an import, some profiles were incorrectly cleared for existing records.
- Corrected an error where remittance advice could not be hidden on e-mailed correspondence.

### **From 4.11.03 - 4.11.04 (Released January 31, 2008)**

#### ***New Features/Modifications***

- Enhanced import process so that embedded nicknames can be separately extracted from the main name and optionally stored in a nominated user defined field.
- Modified import process for better comparison of addresses for matching purposes.
- Modified spacing of some reporter prompts for better readability.
- When displaying possible duplicates while importing records, if user selects Update Address Details, user defined fields and profiles are now also updated if they have values in the record being imported.
- Added web access user name and password to fields exported by a Reporter export.
- Newly imported people with no membership history can now have their Membership Type changed using the Change Membership Type button on the Membership screen.
- Added Renewal Amount Due as a column for Name Plus... Reporter Listings.
- New function to export course history.

#### ***Fixes***

- Corrected an error where export to Demographics interchange table did not function correctly on Reporter.
- Corrected an error where page headers and footers did not hide correctly on all e-mailed correspondence.

### **From 4.11.02 - 4.11.03 (Released December 21, 2007)**

#### ***New Features/Modifications***

- Web access user names and passwords can now be assigned or removed using the Reporter Action function.
- Web access user names and passwords are now also displayed on the Personal Information form so that web access can be given to non-members.
- Added web access user name and password to renewal request letters.

#### ***Fixes***

- Corrected a problem where dynamically generated report headings and fields did not display correctly in Office 2007.
- Corrected an error when importing Renewals with payment via Internet Assistant.

### **From 4.11.01 - 4.11.02 (Released December 10, 2007)**

#### ***New Features/Modifications***

- Software can now automatically check on-line for software updates at a user specified interval.
- New report showing combined professional development credits for both external event session attendance and short course attendance for a nominated date range.
- Event Attendance by Person report can now be filtered for a date range.
- Added credit points earned to Event Attendance by Person report.
- New reports: Membership totals by membership type and membership totals by chapter.
- Added Pass/Fail indicator to Course Attendance by Person and Course Attendance by Organization reports.
- When sending people to an event file, if extended details are selected, date of birth, gender and web address are now also sent.
- Added date of birth as selection criteria on the Reporter.

### **From 4.10.02 - 4.11.01 (Released November 9, 2007)**

#### ***New Features/Modifications***

- Added Internet Assistant processing of on-line User Name/Password Changes and Membership Renewals.
- Web file created by Internet Assistant now includes Course Attendance table. This is to enable calculation of credit points earned by an on-line process.
- Cosmetic change to database options screen.

#### ***Fixes***

- Corrected an error where some reference file pointer numeric fields (such as Referral Source) were not handled correctly when updating a field using the Bulk Updater.
- Corrected an error where a person's sales and donations did not display under Access 2007.
- Corrected an error where corporate associated members could also be selected as non-members on the Reporter.

### **From 4.10.01 - 4.10.02 (Released July 16, 2007)**

#### ***New Features/Modifications***

- Modified check for unregistered software opening large data files so that user is given the chance to register software immediately.
- Modified software packaging initialization routine to empty out all temporary Internet Assistant tables.
- Modified Install Custom Update process so that update files are no longer restricted to being named 'sclu.cdb'. They can now be any name beginning with 'sclu' and ending with '.cdb', for example scluclientName14July2007.cdb. This is to make it easier for clients with multiple custom updates to identify and archive separate updates more effectively.
- Export from Reporter now includes membership type and chapter name.
- When user selects Check for Free Software Updates from the Web Resources menu the web page now displays their current software version and advises which update file to download.
- Rewrote multi-group "OR" selection on Reporter so that it is now 7-10 times faster than previously.
- Modified mde file so that progress bar displays fully when opening a data file.
- Changed all standard membership reports by chapter, branch and regions to only show current members.
- New processes so that all corporate associate members have the same chapters and membership expiry dates as their corporate primary member.
- Added the ability to explicitly include or exclude records marked as 'Not Renewing' to the Reporter.
- New Exception Report listing people who have a Membership Type but do not have an expiry date.
- When checking e-mail, the Internet Assistant now marks each Summit related e-mail as Read when it loads the details into the temporary tables.
- New macros to globally change all form and report currency controls to a generic format that uses the currency format defined in Regional and Language Options in the Windows Control Panel.
- Modified form caption
- Modify software packaging initialization routine to blank out from e-mail address for blast e-mails.

#### ***Fixes***

- Corrected an error where historical details of an incomplete event file import remained
- Corrected an error where the Preview button on the Letterhead Design screen did not function correctly.

### **From 4.09.02 - 4.10.01 (Released 28 June 2007)**

#### ***New Features/Modifications***

- Modified create refund process to take into account overpaid donations.
- New process to check all donations and match the donation amount paid to the total of receipt lines referencing that donation. Called from Run Macro on main menu.
- New macros to globally change all form and report currency controls to a generic format that uses the currency format defined in Regional and Language Options in the Windows Control Panel.
- New Exception Report listing people who have a Membership Type but do not have an expiry date.
- Added the ability to explicitly include or exclude records marked as 'Not Renewing' to the Reporter.
- Changed all standard membership reports by chapter, branch and regions to only show current members.
- New Exception Report listing people who have a Membership Number but do not have a Membership Type.
- Modified mde file so that progress bar displays fully when opening a data file.
- Fixes
- Corrected an error on tax invoice/adjustment note display.
- Corrected an error where the Preview button on the Letterhead Design screen did not function correctly.