Petra 2.2 Release Notes

Partner

New Partner Edit Screen

The Partner Edit screen has been completely revamped to make it much easier to see and edit the information relating to a Partner. It is now possible to see the following information on one screen using a series of tabs:

- Addresses
- Partner Details
- Special Types
- Subscriptions
- Office Specific data
- Notes
- Family members (for PERSON and FAMILY partners). This tab also simplifies the process of moving Partners between families.

Other Partner information is still accessed from the Maintain menu as before, though the intention is to move all of this on to the Partner Edit screen in subsequent patches to 2.2.

Another important feature of this new screen is that it will run much quicker on a remote connection than the old Partner Edit screen, which could be very slow.

Additional Detail Fields

New fields have been added to the details tab (previously the Partner Details screen) for several of the Partner Classes. These include:

Acquisition Code added to New Partner screen

The acquisition code is now entered on the initial New Partner screen rather than on the Partner Details screen as before. This is to make it more likely that people will remember to enter what can be a very important piece of information.

Extensions to Office Specific data

Office Specific Data fields can now be stored at the Partner, Personnel, or Application level (previously it was just at the Personnel level). Partner Office-Specific data is displayed and edited on a separate tab on the Partner Edit screen. Personnel Office-Specific data is still accessed from the Personnel Individual Data Screen. Application Office-Specific data is accessed from a menu-item on the Application Maintenance screen.

The office-specific data is also much more flexible now. It is possible to have different types of office specific field (ie. string, integer, real number, date, true/false, Partner key, and even lookups). Office-specific fields can also be organised into categories which will then affect the way in which they are grouped on the entry screen.

Currently the office-specific fields need to be set up by the Petra team as there are no screens available yet for setting them up. A number of fields have already been set up for the US release. If more are required please contact your local IT staff or petra-support@ict-software.org.

There is a new report available which will allow you to report on these office-specific fields. This is accessible from both the Partner reports menu and the Personnel reports menu.

Foundation Partners

There is now a new type of Partner specifically for Foundations. To create a Foundation Partner you need to create a Partner of Class ORGANISATION and then on the Details tab click the Foundation check-box. At this point an additional tab labelled Foundation Details will appear and information which is specific to Foundations can be entered here.

There is a new Foundation Extract which can be used to create extracts of foundations based on a number of criteria. This is found in the same place as the existing extracts.

Reminders

This is a new feature which allows you to specify a reminder that you would like to be sent to you or someone else by Email. Amongst other things, you can set the text of the reminder, when the reminder will first be sent, the frequency of re-sending of the reminder, the last date that the reminder should be sent and the Email address to which the reminder should be sent. You can deactivate a reminder at any time. The reminder can be associated with either a Partner or a Partner Contact. For example, you might want a reminder to phone a particular donor at a particular time, or you might want a reminder to follow up on a particular contact that you had with somebody.

Reminders can be set up from the Quick Maintain menu on the Partner Find screen, the Maintain menu on the Partner Edit screen or from the Personnel Individual Data Screen (for example if you want a reminder relating to an OMer or applicant).

Areas of Interest

This is a new feature that allows you to specify particular areas of interest for a Partner. This may be used in many different situations. For example, you might want to specify the areas that a donor is particularly interested in supporting, or you might want to indicate which types of work an applicant is interested in, etc. This feature is accessed via the Quick Maintain menu on the Partner Find screen or via the Maintain menu on the Partner Edit screen.

An interest can be entered as a particular country, or a particular field or using an interest code which you can set up. Interests can be organised by category and the level of interest can also be specified. Maintenance of the categories and interest codes is done via the Maintain Tables menus.

There is also a new extract based on the Areas of Interest.

Credit Card Entry

It is now possible to enter the credit card details for a Partner. The Finance Details screen now includes a grid showing the credit cards for the Partner as well as the existing list showing the bank accounts. Adding credit cards is much the same process as adding bank accounts. Credit card numbers are encrypted in the database for security reasons and on the Finance Details screen only the last 4 digits will be displayed. To see the full number you will need to Edit the credit card record and you will only be able to do this if you have been granted the appropriate security access (group BANKENTRY).

Contacts

A few small changes have been made to the Contacts feature:

- Attributes are now included on browse screen
- Attributes hidden as well as notes if contact is restricted (on screen and reports)
- Contact Code filter added to Contact Report
- Contacts can be restricted by either user, group, or module rather than just by module as was the case in Petra 2.1.
- Reminders can now be set for Contacts as described above

Relationships

It is now possible to organize Partner relationships by category. One possible example where this could be useful is if you want to find all Partners that have some kind of family relationship to a person (ie. Mother, sister, brother, etc). Relationship types can be assigned to the appropriate category from the usual Relationship Maintenance screen. It is not mandatory for a Relationship to have a category.

There is a new extract for relationships which enables you to find a set of Partners based on their relationships to other Partners. This extract includes the new category field.

Currently the list of categories is not user-maintainable but will be available in a later patch. Initially Petra will come with two pre-loaded categories, Family & Church. If any additional ones are required please contact your local IT staff or petra-support@ict-software.org.

Extracts

New Extracts added:

- Foundation
- Interest
- Relationship

Also, a Region field has been added to a number of extracts.

Partner Deletion

It is now possible to delete Partners (rather than just de-activating them as before). There are some restrictions on this (eg. If there is finance data associated with a Partner then it cannot be deleted).

Finance

Motivation Short Code

It is now possible to specify a short code for Motivation Details which can then be displayed on receipts instead of the usual code or description.

Tax Deductible flag

There is now a check-box on the gift entry screen that enables you to indicate that the gift is tax-deductible. There are also some new receipt elements that take advantage of this as described below.

New Receipt Elements

The following new receipt elements have been added:

<CUMTOTTXD>	Cumulative total of tax-deductible gifts
<CUMTOTNTXD>	Cumulative total of non-tax-deductible gifts
<GRANDTOTTXD>	Grand total of tax-deductible gifts
<GRANTTOTNTXD>	Grant total of non-tax-deductible gifts
<MOTDETSHORTCODE>	Motivation Detail Short Code
<YTDTOTAL>	Year-to-date gift total
<YTDTOTALTXD>	Year-to-date total of tax-deductible gifts
<YTDTOTALNTXD>	Year-to-date total of non-tax-deductible gifts

Method of Payment

The gift method of payment can now be specified at batch level as well as at gift level. If a method of payment is specified on a batch then it cannot be changed on the individual gifts. This applies to recurring gift batches as well as normal gift batches.

It is also possible to specify a particular bank account that must be used for a particular method of payment. If such a link is set up then the bank account will automatically be set based on the method of payment and it will not be possible to use the wrong bank account for that method of payment. Currently the link between methods of payment and bank accounts cannot be set up by users, so you need to contact your local IT staff or petra-support@ict-software.org if you need to do this.

Recurring Gifts

It is now possible to specify a donation period on recurring gifts. The submission of a batch will fail if the current date is not within the donation period of all the gifts in the batch. If no donation periods are specified then it will just work as before (ie. the submission will work regardless of date).

Reports

The new reports which were originally in a separate tool with Petra 2.1 are now available within Petra under the Extended Reports menu option. These reports offer greater flexibility by allowing full control over what columns are displayed, a wider selection of criteria, and an export to csv option which will open automatically in Excel. It is also possible to produce some reports across multiple ledgers and across multiple periods (ie. one column per period). They also have the advantage that they will run much quicker over a remote connection than the existing Petra reports.

Accounts Payable

Cheques can now contain all that is needed for a Remittance. This allows you to print the Cheque and the Remittance onto the same piece of paper. This involved the addition of the following new form elements, which may also be useful in other contexts: Invoice Number/Code, Invoice Reference, Cheque Number, Payment Reference without cheque number.

Personnel

Office Specific data at Person level and Application level

Office specific data fields can now be entered for Applications as well as for People and they are also much more flexible than before. Please see section on Office Specific Data under Partner above for more details.

Link to Contacts

There is now a link to Partner contacts from the Individual Data Screen.

Applications

The following additions have been made to the Application maintenance screens.

- User can now enter the Partner Key of the applicants reference and a comment for each application form
- The Target Position can now be set.
- One Currency can now be set for all Amounts.
- A Placement Person can be specified for each application

Browse Long-Term Applications (from File menu on Personnel Main screen)

This is a new feature which allows you to see a list of applications based on certain criteria. The criteria which can be specified are Target Field, Placement Person and Application Status. So, for example, this could be used to quickly see all applications which are currently on Hold, or all applications for a specific Field. It is also possible to create an extract directly from this search.

Personal Budgets

Three extra label and value fields added (labels need to be set per Budget record)

Personal Documents

There is now a Category for Document Types (not yet in the UI but hopefully for 2.2)

Commitment Status

Commitment Status values have changed for 2.2 (this was decided by the IPC). The new values are SHORT-TERMER, OMER, LONG-TERMER, STAFF, VOLUNTEER, GUEST. (Short-Term people and Volunteers will not get access to Caleb). Existing status will be automatically updated to the appropriate new status.