

Quarter 4, 2021

Ascendance Improvements

Alumni/Development

- The "Relation Directory" Report has an added column for the Class Year of the students in the preview and exported report

Relation Directory

January 5, 2022 10:06 AM Page: 2

All Constituents All Relationships Sorted by Name, Class Year

| CONSTITUENT NAME | Class Yr | ADDRESS | WORK ADDRESS |
|----------------------|-----------------|---|----------------------|
| Luci Alvarado | 2016 | 111 West 125th Street, #100 New York, NY 10028 (212) 875-8800 | |
| <u>Relation Name</u> | <u>Class Yr</u> | <u>Grade</u> | <u>Relationship</u> |
| Luci Alvarado | 2010 | | Brother |
| ADD Alvarado | 2011 | | Brother |
| Ann Alvarado | | | Mother |
| David Alvarado | | | Father |
| | | | <u>Student Group</u> |
| | | | Graduate |
| | | | Graduate |

- These two Giving Summary Reports now have an option to include the students' names in the preview and export of the report. In order to view the info, you must select the option below:
 - Parent Giving Analysis by Class Report
 - Parent Giving Analysis by Grade Report

Query List

Select Constituents to display: (All)

Select Relations to display: (All)

Select Giving to display: (All)

Sorting conditions: (Default Sort)

Report Title: All Constituents All Relationships All Gifts Sorted by Currer

General | Address | Giving | Report Columns | Output

Name

Format: As Saved

Select: Combined Addressee

Include Maiden Name

Include: Class Yr

Report Options

Standard Mode

Household Mode

Other Options

Include Lost Constituents

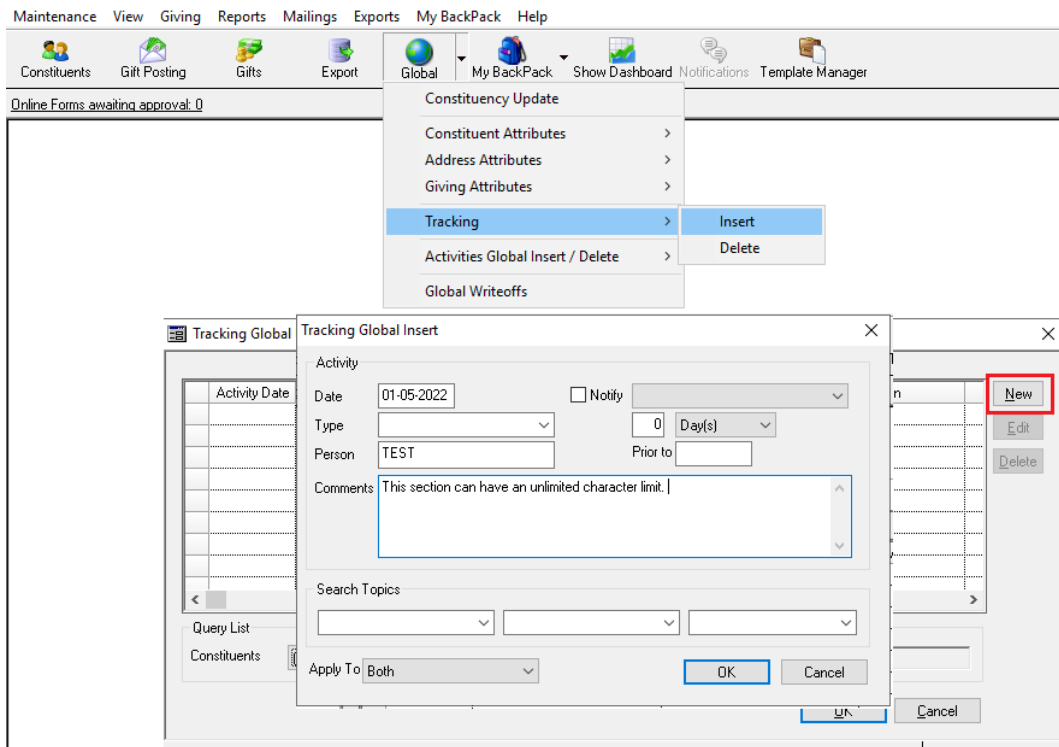
Include Deceased Constituents

Include Inactive Constituents

Include Student Names

Preview Print Export Cancel

- Removed the character limit in the Comments section when inserting new Tracking information



My BackPack

- Added a "Non-Binary" option within the student's profile when N is used from the code maintenance table in the Registrar.

| Student | Family | Schedule | Attendance | Grades | Daily Assignments and Comments | Academic History | Documents (1) |
|------------------------|--------|------------|------------|---------------------------|--------------------------------|-------------------|---------------|
| ID: | | | | Grade: | 11 | Gender: | Non-Binary |
| D.O.B.: | | 03/19/2005 | | SSN: | | Board/Day: | Day |
| Student Group: | | Student | | Enrollment Status: | | | |
| Entry Date: | | | | Re-Entry Date: | | | |
| Admission Year: | | 2022 | | Class Year: | | 2024 | |
| E-Mail: | | | | | | | |
| Alert: | | | | | | | |

Accounts Payable

- When creating a new PO, the default search for a vendor is now the vendor's name

Maintenance View Invoices Checks P.O. & Receiving End of Period Reports Mailing Help

Vendors P.O. Receiving Purchase Entry Cash Disburse Hand Checks History Report Check Register Show Dashboard

Purchase Order Maintenance Search

Purchase Order Maintenance - (New)

P.O. Main Products Comments

Vendor Name

Address

City/State/Zip
Phone
Fax

Order P.O. No.

P.O. Date 01-05-2022

P.O. Type

Requested By

Approved By

Buyer

Status Status OPEN

Delivery Date

Terms

F.O.B. Destination

Ship Via

Ship To

Accounts Receivable

- Student Loan and Financial Aid figures were expanded beyond \$100,000

Student Maintenance - (11-10-2022)

Name Address Info1 Info2 Account All Accts. Charges Pending Deferred Debit Store Store Hist. Medical Track Media Custom Comments

Miscellaneous

Acct. Type FULLPAY

Tuition Plan

Service Plan

Service Plan I.D.

Incidental Late Charges Tuition Refund Ins.

Tuition Late Charges Accident Ins.

Financial Aid

| | Type | Amount |
|--------------|---------|------------|
| Loan | HALFPAY | 184,495.80 |
| Fin. Aid | GENERAL | 184,495.80 |
| Fin. Aid Pct | 50.00 | |