

FIMS 14.50 Release Notes

This document contains brief summaries of the enhancements included and issues resolved in the FIMS version 14.50 update.

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Upgrade Overview

Host*Net clients are scheduled to be upgraded on November 11th, 2017 during scheduled maintenance downtime. Please be advised the servers will be down from 5am to 6pm EST.

On Premise clients on version 12.50 or greater can self-update to 14.50 by downloading the installation package from [Blackbaud Downloads](https://www.blackbaud.com/support/downloads/downloads.aspx) (<https://www.blackbaud.com/support/downloads/downloads.aspx>), extracting the files, and running the **setup1450.exe** file.

On Premise clients on a version earlier than 12.50 must contact FIMS Support.

FIMS Support

Need Help?

If you have questions or need assistance, please contact Support.

Online: Visit Case Central at <https://www.blackbaud.com/casecentral/casesearch.aspx>. Click the **Case** tab at the top and click **Create New Case**.

Phone: (800) 256-7772

Support Hours: M-F, 8:30 am – 8:00 pm ET

Enhancements

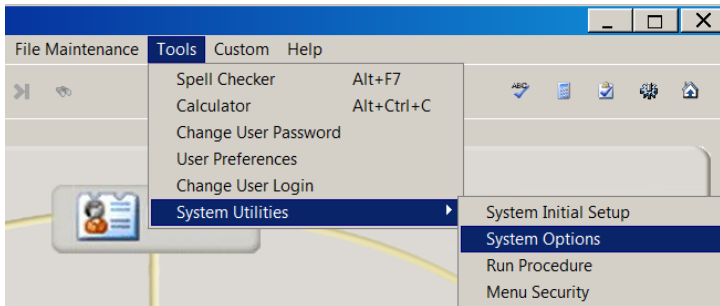
Country Fields and Country Code Lookup

Additional Country fields

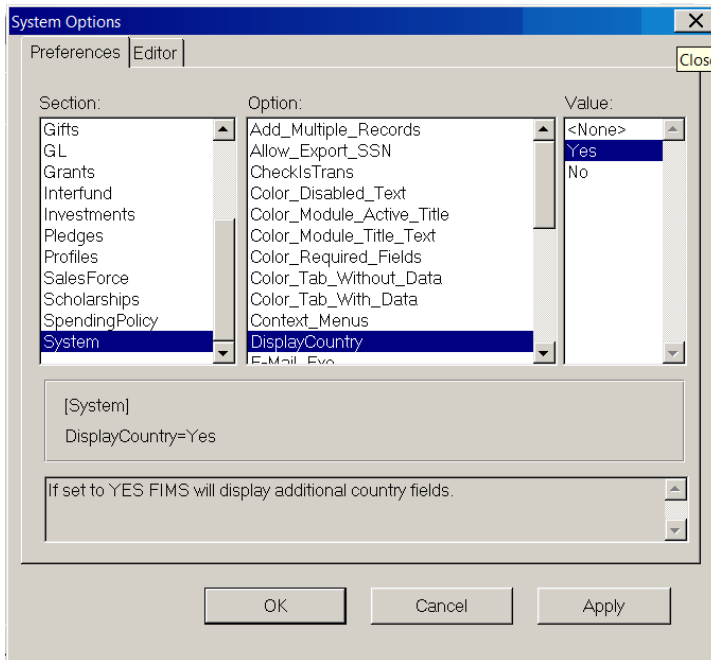
You can now include a **Country** field in additional locations in FIMS. The new fields are optional, and need to be enabled.

To enable the new Country fields:

1. Go to **Tools > System Utilities > System Options**.



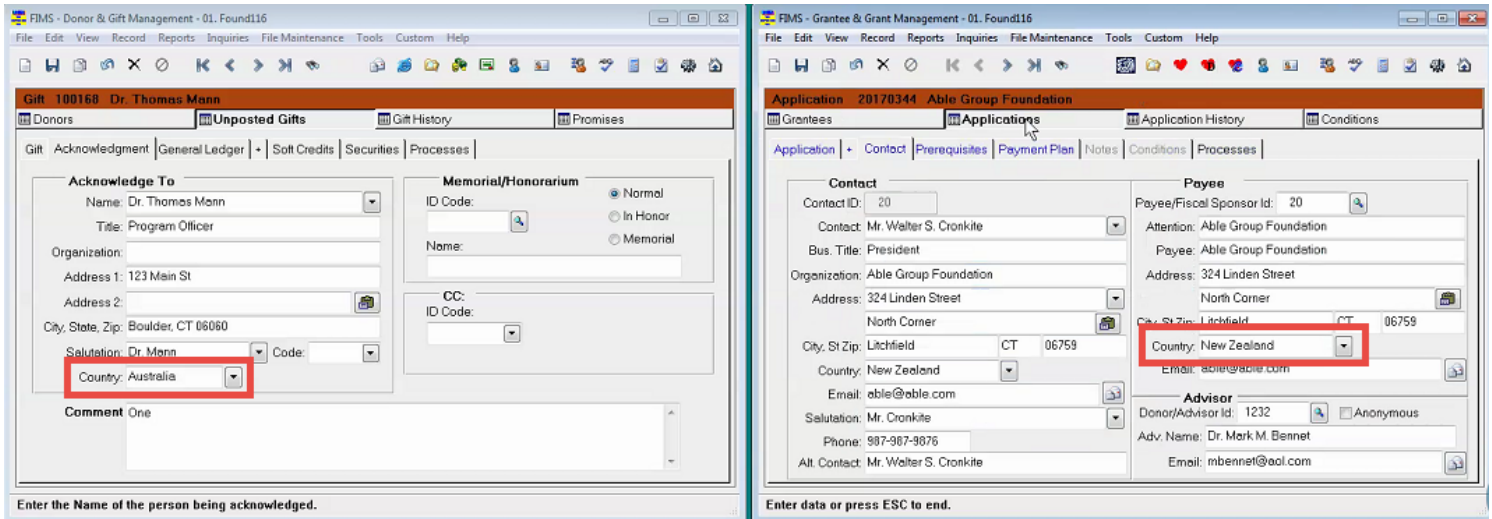
2. Choose **System, DisplayCountry** and **Yes**.



3. Click **OK**.

Once enabled, a Country field displays in the following areas:

- **Grant Applications and Application History screens > Contact Tab > Left (Contact) Side**
- **Scholarship Applications and Application History screens > Contact Tab > Left (Student) Side**
- **Unposted Gifts and Gift History screens > Acknowledgement > Acknowledge To**
- **Unposted Pledges and Pledge History screens > Acknowledgement > Acknowledge To**



The following Import programs automatically include the **Country** field, whether **DisplayCountry** is set to **Yes** or not:

- **Grant Import**
- **Scholarship Import**
- **Gift Import**
- **Pledge Import**

Exports will *not* include the **Country** field unless **DisplayCountry** is set to **Yes**.

Adding a new record prefills the **Country** field automatically:

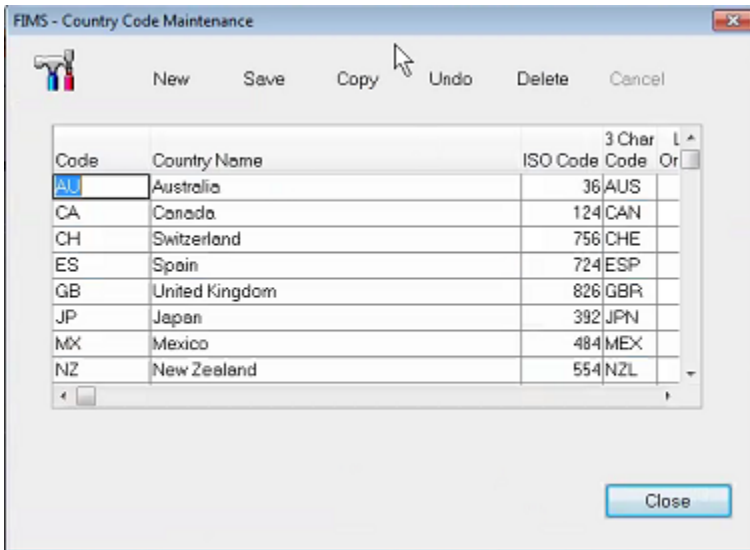
- In mailing data, **Country** defaults from **Profile** or **Alternate Address**
- In Pledge Payments, **Country** defaults from **Pledge History**
- In Profile and Alternate Address, **Country** defaults from System Initial Setup or Foundation Country, unless the **User Preference, DefaultCountry**, is assigned

Note: The Country field will display where it previously existed, even when **DisplayCountry** is set to **No**.

Country Code lookup

When filling in a value for the **Country Code** field, a Country Code Lookup tool is now available in screens and reports.

To use the code lookup, go to **File Maintenance > Profiles > Profile Code Maintenance > Country** to display the country code record.



FIMS currently uses **Code** and **Country Name**. The **ISO-Code**, **3 Char Code** and **FreqUse** values are for future releases.

Initial country codes are created for US-USA, CA-CAN, GB-GBR, BS-BHS, BM-BMI or PR-PRI based on the **System Initial Setup > Foundation Country** field.

Tip: Review the country code record, then add other codes that your foundation uses.

A country code record in this tool is not required to fill in a **Country** field throughout FIMS. You can still just enter the country, such as Spain, even if Spain doesn't exist as a country record in FIMS.

Gifts Enhancements

Gift Hold Reason

For unposted gifts, you can now include a **Hold Reason**, a new field available on the **Gift** table.

This free-form, single-line field adds frequently-used values to a table under **File Maintenance > Gifts > Donor and Gift Code Maintenance > Gift Hold Reason**.

The field clears when a gift is taken off hold, which means there is no similar field in Gift History.

Additional Detail
 Comment
 Distributions
 Other

Non-Gift Amt.:
 Anonymous
 On Hold
 Pledge No.: 00000

Interfund
 Hold Reason:
 Installment: 0

When new gifts are created and the **Default_Gifts_On_Hold** option is set to **Yes**, the **Hold Reason** prefills with the value from **Default_Gifts_Hold_Reason** in **System Option**. This applies to Gift Entry and Gift Import.

To assign a **Hold Reason** when placing gifts on hold, right-click **Gifts Data Grid > On Hold** and choose from the options.

Update On Hold [X]

On Hold
 Current Record

 Highlighted Records

Tagged Records

All Records

When selecting multiple records that include some that were already on hold and assigning a blank hold reason, the **Hold Reason** only updates those records where the gift was not previously on hold.

Batch Update

You can now do a batch update to update the batch value on selected gifts. Right-click on records in **Gifts Data Grid** and select **Batch Update**.

You can choose **Run Gift Edit Report** to run the report after applying the updates.

Batch Update [X]

Batch
 Current Record

Run Gift Edit Report
 Highlighted Records

Tagged Records

All Records

When you click **OK**, the batch updates, then displays a screen to select parameters for the **Gift Edit Report**, based on Batch Entered, Range of Gift Dates and Gift Numbers.

Grant Enhancements

Mass Update

You can now apply mass updates to applications in Grant Application. Select any or multiple rows in the **Grant Data Grid**, right-click, and select **Mass Update**.

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Ne	Mass Update	9,

In **Mass Update**, you can choose **Action**, **Status**, **Board Date**, **Committee Date**, **Grant Date**, **Committee Code**, and **Batch**. When you click **OK**, updates apply to the chosen selection of **Current Record**, **Highlighted Records**, **Tagged Records** and **All Records** in the Data Grid.

Mass Update

Select Fields to Update

- Action: Approved
- Status: app
- Board Date
- Committee Date
- Grant Date: 09/19/2017
- Comm Code
- Batch: 17Sep19
- Run Applications Edit Report

Current Record
 Highlighted Records
 Tagged Records
 All Records

OK Cancel

You can also choose **Run Applications Edit Report** to run the report after applying the updates.

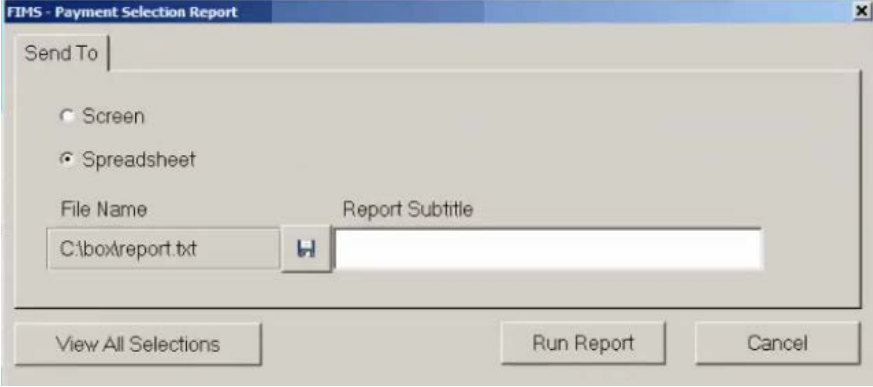
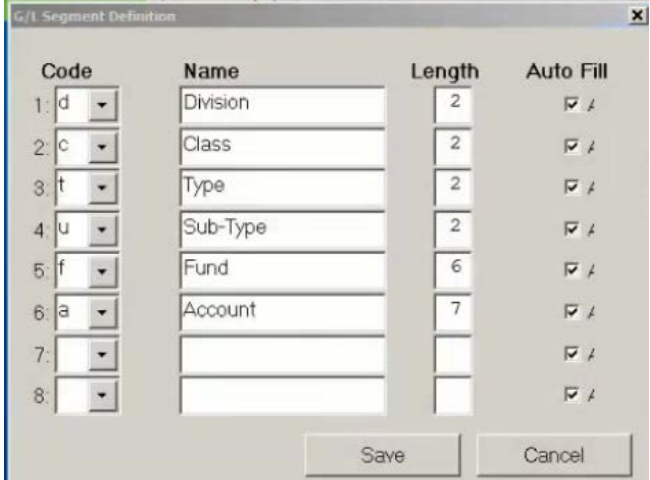
When you click **OK**, the batch updates, then displays the following screen to select parameters for the **Grant Edit Report**, based on Batch Entered, Range of Grant Dates and Grant Numbers.

Note: The **Edit Report** pulls grants within the defined selection range, which may be more than were highlighted.

Minor Enhancements

The following minor enhancements were also added to this release.

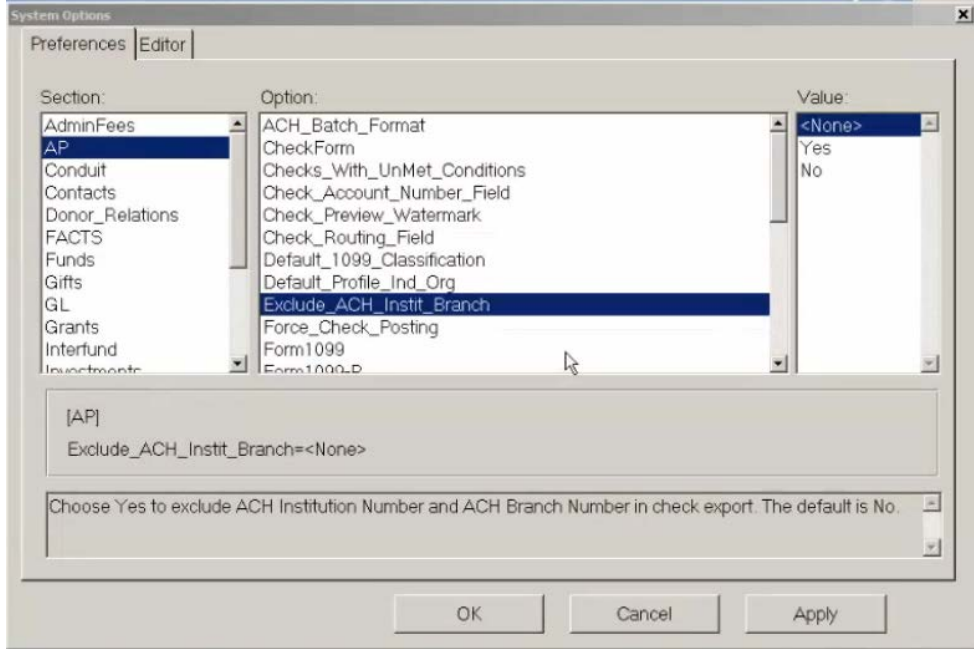
ID	Module	Description
12003	Administrative Fees	The Administrative Fee General Ledger Summary report was enhanced to improve the sort and display of data.
15592	Accounts Payable	You can now export data for the Payment Selection Report . Go to Reports > Accounts Payable > Payment Selection Report > OK , and choose Spreadsheet from the Send To tab.

ID	Module	Description																																				
		 <p>To display all data in the export without rollup or consolidation, select Display Fund Detail in the Payment Selection Report > Selection Criteria screen.</p>																																				
14846	General Ledger	<p>During the Auto-Build processing of a General Ledger Account, you'll now see the Fund ID, in addition to the previously displayed Fund Name.</p> <p>Go to File Maintenance > Auto-Build G/L Accounts > OK to process.</p> <p>Tip: If you don't see a processing window, the build may have completed too quickly to display processing data.</p>																																				
28153	General Ledger	<p>In Fund Class, you can now use a 7-character General Ledger Natural Account key.</p> <p>You'll find the updated length option in Tools > System Utilities > Admin Utilities > Finance Utilities > GL Segment Definition > Account.</p>  <table border="1" data-bbox="592 1323 1218 1743"> <thead> <tr> <th>Code</th> <th>Name</th> <th>Length</th> <th>Auto Fill</th> </tr> </thead> <tbody> <tr> <td>1: d</td> <td>Division</td> <td>2</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>2: c</td> <td>Class</td> <td>2</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>3: t</td> <td>Type</td> <td>2</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>4: u</td> <td>Sub-Type</td> <td>2</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>5: f</td> <td>Fund</td> <td>6</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>6: a</td> <td>Account</td> <td>7</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>7:</td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>8:</td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Code	Name	Length	Auto Fill	1: d	Division	2	<input checked="" type="checkbox"/>	2: c	Class	2	<input checked="" type="checkbox"/>	3: t	Type	2	<input checked="" type="checkbox"/>	4: u	Sub-Type	2	<input checked="" type="checkbox"/>	5: f	Fund	6	<input checked="" type="checkbox"/>	6: a	Account	7	<input checked="" type="checkbox"/>	7:			<input checked="" type="checkbox"/>	8:			<input checked="" type="checkbox"/>
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ID	Module	Description
		Current FIMS clients will not be able to expand to use 7 characters unless the natural account is the last segment in the Full General Ledger Account Key.
26768	Grants	<p>When creating Applications from Historic Applications, you can now copy FieldMaker data.</p> <p>If the FieldMaker data is not copied to a new Application, the default FieldMaker is used for the new application.</p> <p>When creating applications from history, you can choose the new copy option in the following areas:</p> <ul style="list-style-type: none"> • File Maintenance > Grants > Auto-Create Grant Applications • File Maintenance > Scholarships > Application Autobuild • Grants Module > Application History > Copy button • Scholarship Module > Application History > Copy button
28156	Help	<p>In FIMS > Help, the option, Submit a case via PowerME, was updated to Submit a case via Blackbaud Case Central.</p> <p>The link now directs to https://www.blackbaud.com/casecentral/casesearch.aspx.</p>
22165	Multi-Currency	Updates were made to support multiple currencies. Training is recommended before leveraging multiple-currency features.

Resolved Issues

The following issues are resolved in this release. We have provided the case numbers for internal referencing along with a description of the issue.

ID	Module	Description
26763 13663033	AP	An issue was resolved in AP Module > Open Items > Processes > Print Checks > Check Export that caused a check to have an ACH account number from the check directly above in the report.
27557	AP	<p>The 14.43 release added two fields in the Check Data Export, ACH-Branch-Numb and ACH-Instit-Numb, to include the ACH branch and institution numbers. This caused issues for some foundations during automatic data transmission to their bank.</p> <p>In this release, a new System Options, Exclude_ACH_Instit_Branch, was added that excludes ACH Institution and Branch numbers from Check Data Export by default. Set the option to Yes to exclude the fields.</p> 
18704	DonorCentral NXT Real Time Sync	<p>In Gifts Module > Unposted Gifts > Securities tab, changes to amounts for Unposted Gift now correctly update in DonorCentral NXT.</p> <p>Pending Gifts is available on DonorCentral only, not legacy eDonorCentral.</p>

ID	Module	Description
		This does not apply to DonorCentral v4.
19704	DonorCentral NXT Real Time Sync	Gift adjustments and Pledge write-offs now properly sync to DonorCentral NXT through Real Time Sync. This does not apply to DonorCentral v4.
27389	DonorCentral NXT Real Time Sync	In Funds > Fund Associations , the data sync to DonorCentral NXT was corrected so that now: <ul style="list-style-type: none"> • When removing the last advisor from DonorCentral NXT, the funds are also removed • When a staff personnel is removed from DonorCentral NXT, their access is also removed This does not apply to DonorCentral v4.
27758	DonorCentral NXT Real Time Sync	Previously, when removing a staff person from File Maintenance > Profiles > Profile Code Maintenance > Staff , Real Time Sync did not remove the person from DonorCentral NXT until the next full upload which allowed the person to continue to log in. This has been resolved. This does not apply to DonorCentral v4.
26534	FACTS	When no pools exist, the error, "No record available," no longer displays after opening FACTS Module > Pool .
18382 376967	Grants	After an Application is changed from Approved to Open , the Application is no longer included when selecting Edit Report in the Grants or Scholarship modules.
26500	Profiles	In Reports > Profiles > Full Profile Report , updates were made to improve alignment and wrapping display.