

## July 21, 2020 (Version 9.7.5)

### Fixes

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### Payroll

- **Reports > 941 Summary:** Corrected an issue with the U. S. Payroll Tax Form 941 2020 Second Quarter.

## July 10, 2020 (Version 9.7.4)

### Enhancements

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#### Payroll

- **Reports > 941 Summary:** Updated to the U. S. Payroll Tax Form 941 2020 Second Quarter.

## May 26, 2020 (Version 9.7.3)

### Fixes

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#### Accounts Receivable

- **Reports > Aging Period Summary:** The Aging Period Summary is now displaying receipts properly.

#### General Ledger

- **Reports > Detail Ledger:** Detail Ledger report with selection to filter by date was producing wrong values.
- **Modify > Special Reports Setup:** Corrected an issue where the Detail Ledger report was not showing totals
- **Modify > Special Reports Setup:** Corrected an issue where the Financial Spreadsheet report was not including all columns when only one year exists.
- **Reports > Budgeted Financials Statement:** Fixed an issue where an error could occur when exporting the Budgeted Financial Statement report to Excel when the "Include Opening and Ending Balance for Each Department" option is selected.
- **Modify > Special Reports Setup:** Detail Ledger report used in a Special Report was missing correct formatting and account totals.
- **Reports > Financial Spreadsheet:** Fixed an issue where an error could occur when exporting Financial Spreadsheet to Excel when the page break option is 'None'.
- **Reports > Chart of Accounts:** Removed double spacing in the Chart of Accounts report when Detail is selected.
- **Modify > Special Reports Setup:** Corrected a columns alignment issue in the Financial Spreadsheet in Special Reports.

#### Payroll

- **Reports > Employee Earnings:** Corrected an issue with extra blank spaces between employees on the Employee Earnings for "Check Summary" and "Employee Summary".

#### Remittance

- **Reports > Statements:** Fixed an issue that was excluding activities with no amounts when using the option to include only "Remitted or Pledged" and using the option to "Print All Activities".

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## May 5, 2020 (Version 9.7.2)

### Fixes

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#### Accounts Receivable

- **Reports > Monthly Statements:** Corrected an issue where selecting statements to email caused the program to show all statements, not just the selected email group.

#### General Ledger

- **Utilities > Close Fiscal Year:** Corrected an issue where closing a year caused the program to close the next year and create an additional future year.

#### Payroll

- **Reports > Paid Family And Medical Leave:** The Paid Family And Medical Leave csv download is now showing correct values.
- **View > Earnings Inquiry:** Restored the header information for the Earnings Inquiry's print preview.

## April 22, 2020 (Version 9.7.1)

### Enhancements

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#### Accounts Payable

- **Reports > 1099s:** Updated 1099 options to comply with the new fields in 1099-MISC and the new form 1099-NEC.

### Fixes

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#### Accounts Receivable

- **Reports > Monthly Statements:** Corrected payment due on statements with multiple pages.

## April 7, 2020 (Version 9.7)

### Enhancements

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#### Accounts Receivable

- **Manage > Recurring Charges > Transfer Recurring Charges:** Added an option to "Create Invoices Only?" when "Transfer Ach Recurring Charges?" is selected.

#### Bank Account Management

- **Modify > Bank Account Information:** Added the Royal Bank format to checks printed on blank check stock for Canadian customers.

#### General

- **AppCues:** Added a **Notification**  icon to each Shelby Financials home screen. This allows us to push important messages when the need arises.
- **Login > MinistryID:** MinistryID is an exciting new feature that allows for a Single Sign-On system across ShelbyNext Financials and other Ministry Brands platforms, including the ShelbyNext Giving platform. This will be accessible to staff members and individuals who have portal access. There will be only one username and password to remember across these platforms and more products are being added soon. See [Login](#) for more information.

#### Remittance

- **Utilities > Export:** Added functionality for Denomination HQs that need to provide statistical information from the reporting churches to the National or World headquarters to export specific values from the Remittance application into an excel spreadsheet. This tool was designed to meet reporting standards required by GCFA for reporting United Methodist Annual Conferences. However, it is flexible enough to meet needs of other organizations that would like to export information from Remittance into Excel.

### Fixes

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#### Accounts Payable

- **Manage > Payment Processing:** Corrected an issue in the case of paying two invoices and one check was printing even when "Print on Separate Check" was selected. Program now prints two checks.
- **Manage > Payment Processing:** Corrected an issue with discount values when creating invoices if the Company is on Cash basis.

- **Reports > 1099s:** Corrected an issue with the 1099 Electronic Submission tool that was placing values in the "K" field for all states. At this point only 30 states require the "K" field.
- **Reports > Aged Analysis:** The Aged Analysis report is now honoring the selected Page Break options.
- **Enter > Transaction:** Corrected an issue when entering more than 15 rows, the program now takes user to a new page on the 16th entry.

## Accounts Receivable

- **Utilities > Apply Late Charges:** Fixed an issue where late charges were not calculating correctly.
- **Utilities > Apply Unapplied Cash:** Fixed issue causing one-line journals when using the Apply Unapplied Cash utility on Cash Basis revenue centers.
- **Modify > Customer Information > Relationships:** Corrected multiple issues when opening the Relationships tab.
- **Manage > Payment Processing:** When using the Shelby Teller import and scanning checks with the Canon check scanner, it no longer incorrectly marks the payments as ACH.
- **Manage > Recurring Charges:** Corrected an issue when a recurring charge contained a zero in the quantity field.
- **Reports > Aging Period Summary:** The receipts column now honors filter settings.
- **Reports > Monthly Statements:** Corrected an issue where Statements were not honoring the Balance Forward option.
- **Modify > Statement Design:** The Test Statement Design feature no longer produces an error.
- **View > Transaction Inquiry:** Corrected an error where amounts were showing incorrectly upon opening the associated invoice.
- **Manage > Unposted Invoices:** The Total line on the Edit Report now shows correct values.
- **Portal > Accounts Receivable:** The Accounts Receivable Portal will now be able to handle overpayments and process them as unapplied cash.
- **Modify > Credit Card Information:** Corrected an issue where choosing to edit a credit card user would produce warning.

## Bank Account Management

- **Modify > Bank Account Information > Pre-printed Checks:** The Number of Stub Lines now equal the number of detail lines plus the Total line for pre-printed checks.
- **Manage > Bank Statement:** Removing the "Finalize" checkmark when editing a statement in the Reconcile Bank Statement area now properly opens up statement for editing.
- **Manage > Unposted Transactions:** Corrected the sort order for the Transaction Edit Report.
- **Modify > Bank Account Information:** Corrected an issue where selecting "Test Preprinted Checks" produced an error.

## Deposits on Hand

- **Reports > Trial Balance:** Corrected the ending balance value in the Trial Balance report.

## Fixed Assets

- **Manage > Calculate Depreciation:** Corrected the Manage Depreciation process to ignore invalid accounts for assets that are sold, retired, or fully depreciated. Also added the Asset Description and Tag Number to the "invalid account" modal.

## General Ledger

- **Reports > Budgeted Financial Statement:** The Budgeted Financial Statement now works correctly when Report Type = Summary.
- **Reports > Budgeted Financial Statement:** Document map will not show in the Budgeted Financial Reports if no levels are setup.
- **Reports > Budgeted Financial Statement:** Export to Excel now honors page break by creating separate worksheets within the exported workbook.
- **Reports > Chart of Accounts:** The report now produces results for companies that do not employ any levels.
- **Reports > Detail Ledger:** Export to .csv now shows the entire account number string.
- **Reports > Financial Spreadsheet:** The report now honors the selected Ending Period Option.
- **Reports > Financial Spreadsheet:** Corrected the report to honor page break options.
- **Reports > Preliminary Budget:** Corrected math and page setup features on the Preliminary Budget report.



- **Reports > Statement of Activities:** Statement of Activities now honors the Suppress Zero Balances correctly.
- **Modify > Special Reports Setup:** Fixed a column sorting issue in the Detail Ledger Report.
- **Modify > Special Reports Setup:** The Preliminary Budget Report setup now honors the "Reverse sign when printing" option correctly.
- **Manage > Unposted Journals:** Removed extra column showing in Journal Edit Report and Post Journals list.
- **Modify > Special Reports Setup:** Fixed the Statement of Activities reports so it will honor the "Print in Landscape" selection.

## Insurance Billing

- **Modify > Preferences:** Corrected an issue where a very long name entered in the Insurance Type caused an error.

## Purchasing Management

- **Manage > Requests:** Corrected error when user chooses to print requests.
- **Manage > Requests:** Corrected an issue where users could change the Vendor on a previously approved request.
- **Manage > Requests > Payment Approval:** Outstanding and Remaining amounts now calculate correctly even when invoices have been paid and/or voided.
- **Manage > Requests:** The Email Notifications feature now allows users to approve or deny from the emailed notification.

## Payroll

- **Agent:** Corrected Payroll issue where some customers missing all tax tables.
- **Modify > Employee Information:** Fixed issue that caused employees with no specific approval rights for time off to approve time off.
- **Modify > Employee Information:** Corrected a Payroll issue where Minister Only options were showing for non-ministers.
- **Manage > Payroll Processing:** Fixed issue in Payroll where an employee is setup to receive employer matching, and payroll is processed and ready for review, then the salary amount is changed for the employee, the program was not recalculating the employer amount.
- **Reports > Employee Earnings:** Corrected an issue with the Employee Earnings Report when selecting Check Summary, the report was omitting individual check information.

## Remittance

- **Modify > Church Information:** Editing a church's record in Remittance no longer creates a duplicate record.
- **Enter > Remittance:** Changed the Remittance entry screen to only show one blank line at start of the entry process.
- **Reports > Statements:** Corrected issue with the Monthly Statement's Month column. It now shows the correct values.

## Security Setup

- **Security Setup > Users:** Program no longer blocks Admins from making changes to existing user accounts where they have reached their maximum allowed number but are not trying to add additional users.

## Utilities

- **Organization > Security Settings:** Corrected issue where program was not saving Password Strength complexity settings.