

ReQuest Manager 3.0

Release Notes

ReQuest Manager 3.0 is a major platform upgrade that requires a full installation (not just application of an update, as for point-updates).

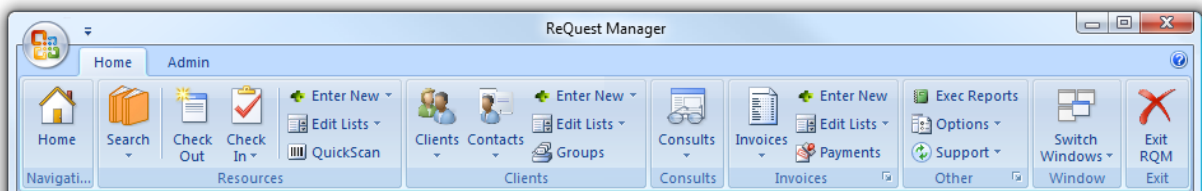
If upgrading RQM from a previous 2.x version, please know that RQM will need to import your existing RQM 2.x data file (rqm2data.mdb) and convert it into the new format for 3.x (rqm3data.accdb). This is normal behavior, and the conversion of the data file may take a few minutes to complete. *Finally, you will receive a message that the data update completed successfully.*

What's New in This Version

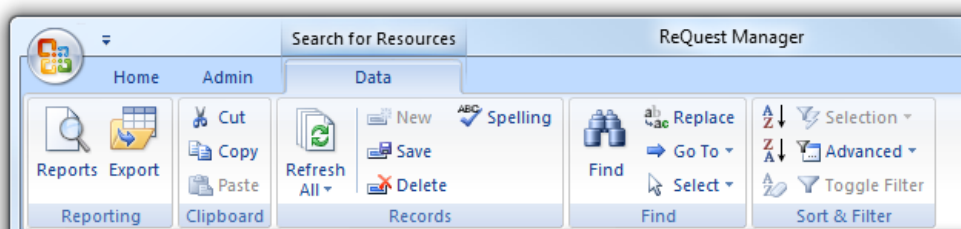
Many of the improvements to ReQuest Manager 3.0 are technical in nature – all designed to improve the user experience, simplify installation and configuration of RQM, and help RQM to work well on more recent versions of Windows (such as Vista and Windows 7, both 32-bit and 64-bit). You'll notice changes in the following areas:

Ribbon:

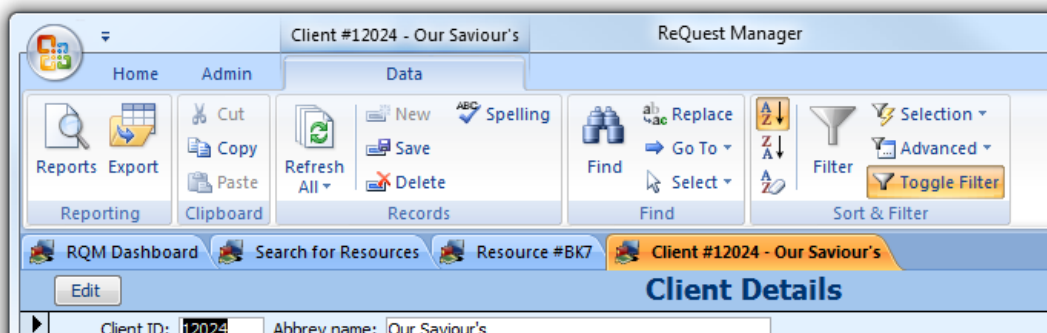
The **Office Fluent Ribbon** replaces the File/Edit/Resource, etc. menus at the top of the screen:



Familiar to users of Office 2007, the ribbon is a colorful and convenient presentation of a lot of functionality from anywhere within RQM. You should get used to looking at the ribbon for actions you want to do. Note that the ribbon changes depending on the screen you're on:

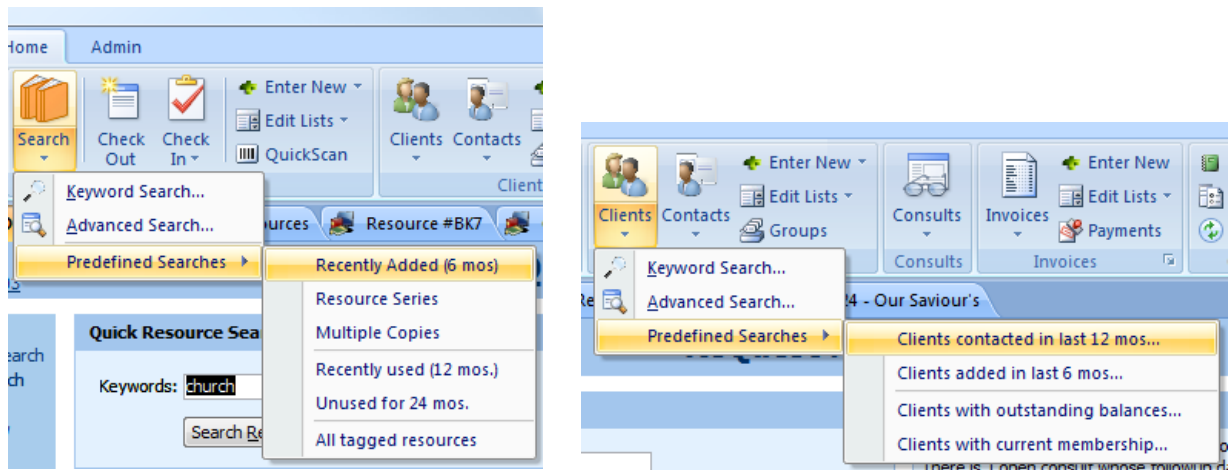


Ever get interrupted in what you're doing? The new **Tabbed Interface** helps you keep track of all your windows while you're working:



You can easily jump around to other open forms in RQM as you multitask! You won't lose open windows that get hidden behind others.

Use **Predefined Searches** to easily jump to results for some frequently-used searches:



We think you'll find that once you explore and discover the possibilities in the new RQM, you will wonder how you ever got anything done before!

New Features:

- Increased **Client Membership Levels**, up to ten levels of memberships, up from four in previous versions.
- **Reports** have been redesigned to look better on screen and printed. When selecting the report to view, a description of exactly what the report is and where it gets its information is displayed so you know what you're getting.
- Better support for **internationalization** (date and currency formats) throughout.

Technical:

- RQM 3.0 now uses the **Access 2007 Runtime Engine**, an upgrade from the Access 2002 runtime that was used by RQM 2.x. It also uses a **SageKey Install Wizard** to easily and safely install RQM on any supported computer. Unlike previous versions of RQM, version 3.x co-exists peacefully with other versions of Access or Office that may be installed on your computer.
- The **update process** is more automated now: for users of RQM with current support contracts, RQM will periodically check for new versions and quietly download them in the background. Updates are applied when starting RQM (the user is prompted to grant permission to update), requiring much less user involvement. No more manually downloading of files and no more passwords to enter!

All this means that we can release updates more easily and more frequently, ensuring that you get new features and fixes for problems as quickly as they are released.

- The **default installation directory** has been moved from C:\Program Files (in RQM 2.x) to C:\ProgramData\ReQuest Manager (RQM 3.x in Windows Vista and later) or C:\Documents and Settings\All Users\Application Data\ReQuest Manager (RQM 3.x in Windows XP). This change reflects the new user security model recommended by Microsoft, and also eliminates many previous problems with granting user permissions prior to using RQM 2.x.

What Was New in 2.8

Version 2.8 was a major feature update that added new functionality, including:

Clients and Contacts areas:

- **New select fields for Client Status and Contact Status**, which replace the single checkboxes (True/False) for Client Active and Contact Active. The new status choices include Active, Warning (flagged for past problems), Inactive, Disbanded/Deceased, and Combined/Moved. For clients, "Combined with" lets you select the client ID that the client was combined with. For contacts, "Moved to" lets you point to a new client that the contact has moved to (e.g. a pastor that moves to a new church can be tracked this way to be able to retrieve her previous transactions while at the previous client).
- **Warning alert for clients and contacts:** if you mark a client's or contact's status as "Warning" then an alert will pop up when creating a new transaction for them. Use this if you have "problem" users who are delinquent in payment or have overdue items, and you can be warned before you ship additional items to them.
- **New Client and Contact "Groups":** this is a flexible extension of the old "Newsletter" checkbox, but instead of one True/False flag, you can create named groups and associate clients and/or contacts with those groups. Then you can later search by those groups to pull up all clients or contacts that belong to the group. You can create groups for special interests, for mailing lists, special memberships, or attendance at workshops (for future follow-ups). The possibilities are endless! Edit Groups using the new "Groups" link on the left-hand Dashboard menu, or from within a client or contact record.
- **New ability to merge duplicate contacts:** If you discover two similarly named contacts in the same client are duplicate entries, go to Client details, Contacts tab,

and click "Combine Duplicate." All previous transactions and consultations will migrate to the chosen contact, and the duplicate will be deleted.

- **Added Date Created searching for Contacts, Last Contacted date for contacts, and searching on contact memo field**
- **Added Transaction and Consults reports for contacts**
- **Added contact grouping for Transaction and Consults client reports**
- **New "Website" field for clients and contacts**

Resources:

- **New Resource Vendors list**, complete with addresses, phone numbers, email, website, and contacts for tracking resource vendors. All existing Vendor entries for resources are automatically linked to the new table. Go to Admin / Data Lists to edit the Resource Vendors table.
- **# of Copies counts only active copies**: resource copies marked as lost, deleted, Out for Repairs, or Archived, aren't counted in the total number of copies of a resource anymore.
- **Resource Purchase Year is now Resource Purchase Date**: now stores the full date of purchase, instead of just the year.

Transactions and Invoices:

- **RQM now computes shipping time** based on a table of postal holidays and estimated number of business days for each shipping method. Watch the dates automatically calculate to accommodate weekends and postal holidays, to help you estimate when your clients will receive their items. Go to Admin / Data Lists to edit the list of Shipping Methods and

Various areas:

- Widened various forms to support larger monitors and enhance the display of information.
- Enabled support for localization of date formats (m/dd/yyyy vs dd/mm/yyyy) and international currencies.
- Miscellaneous forms streamlined and refined.
- Miscellaneous bug fixes throughout.