



What's New in Exceed! Premier 8.7

- **Smart Search**
 - Searches House/Organization, first name, last name, second first name, second last name, AKA, address (line 1 & 2), phone, email address, entity ID and person ID
- **New Reports:**
 - Five Year Donor Retention Overview
 - Five Year Revenue by Size
 - Lapsed Donor Analysis
 - New and Existing Donor Analysis
 - Birthday List (doesn't have to be a volunteer now)
 - Size Category List (previously was only an export)
- **Improved Reports:**
 - Prospect Detail Sheet now can include comments.
 - LYBUNT -- You can choose to list last year's totals only or list last year's gifts too.
 - Guest room roster reports (and Room link) now show if guest is past their expected departure date.
 - Web Site added as an option for reports with phone type options
 - Event RSVP List and Event Group Assignment show the organization name in addition to the person's name (if it's an organization).
- **Electronic Funds Transfer**
 - For credit card, you can choose to have settlement date or transaction date to go with the gift.
- **Bio Solicitor Code Enhancement**
 - Option to turn off the automatic assigning of Bio Solicitor to a gift
- **Backup**
 - Can now be done to a UNC drive.
- **Guest Enhancement**
 - Can now add a guest to an inactive room. This enables a stay/confirmed to be assigned while the room is closed
- **Compatibility with WealthEngine, FindWealth 8**
- **Export archived records to Excel**



What's New in Exceed! Premier 8.6

- **Tribute code list added to Gift screen with search option**
 - There is now a "?" button next to the Tribute field on the Gifts screen that will allow you to search by any Tribute field for a specific Tribute code.
- **Event Guest Note field added for each individual in Groupings**
 - In the Assign Groupings screen of the Event module, notes can be added to each guest attending the event.
- **Print button in Batch Maintenance screen gives option for batch date range**
 - When clicking the Print button in the Batch Maintenance screen, you now have the option to print summary information for multiple batches within a specified date range.
- **Batch screen search option added**
 - A Search button has been added to the Batch Maintenance screen that allows you to search for a specific batch name.
- **Batch dates can be edited**
 - The date attached to a batch can now be changed once it has been saved.
- **Zillow button added in Bio/Address tab**
 - A button has been added to the Address tab of the Master Biographical screen to search for an address on Zillow.com.
- **Letter templates can be marked active or inactive.**
 - In the Letters tab of the Application Setup screen, letters can be marked as Inactive so they don't show in the list of letters when using the Acknowledgement On-The-Fly feature on the Gifts screen.
- **Acknowledgment letters can be selected from a list rather than entering the code**
 - When running Acknowledgement Letters in the Mailings screen you have the option to select multiple letters vs. just a range of letters.
- **Gift List Merge can now include gift type and gift method, plus a calculated total**
 - The Gift List merge letter now has the option to include the gift method, gift type, and total gift amount.
- **Solicitor Report has option to check "All" to select all solicitors**
- **Zip code lookup updated for USA and Canada**
 - The database used when using the zip code lookup feature has been updated to reflect post code changes.