VERSION 4.4.0 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in release v4.4.0 of ConnectNow Family Suite and Diocesan Suite.

Contents

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ConnectNow Family Suite

System-Wide

Resolved Issues

'Help with this page' Link on HELP Menu Now Works in Firefox

Previously in Firefox, selecting the Help with this page link on the **HELP** menu opened the Help topic for the Home page instead of the Help topic for the page the user was currently viewing. We found and fixed the cause of this issue. The Help with this page link now opens the expected page in Firefox for all modules.

Various Typographical and Grammatical Errors Fixed

We identified and fixed inadvertent typographical and grammatical errors occurring within applications in ConnectNow Family Suite. Corrections were made to the various components of the user interface, for example, messages, notifications, tabs and buttons, and field labels.

Function Applied to Preserve the Display of Leading Zeros in CSV Export Files Removed

Previously in the **.csv** export file, a function was applied to data with leading zeros (for example, postal code values) to enable the zeros to display when the data in the file was viewed in Excel. Unfortunately, applying the function caused problems if the **.csv** file was subsequently mail merged. To prevent issues in the mail merged document, we stopped applying the function and will export leading-zero data as is. Users will not experience problems with Mail Merge. They will still be able to analyze data in Excel even though the leading zeros are not displayed.

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Home

Resolved Issues

Count of Families with Suspense Activity Corrected

Previously for some organizations, the count on the **Home** page indicated that there were pending Family Directory updates when there were no records requiring review. We fixed this issue.

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Mail Merge

Resolved Issues

Tooltip Text Displayed for the Show All Field Codes Button Corrected

Previously, the wrong tooltip text was displayed for the **Show All Field Codes** button on the Mail Merge toolbar. The tooltip text was corrected and now reads as follows:

```
Displays the field labels that represent the data that will be added from
your ParishSOFT data into your merge document. Advanced users can alter the
output by modifying the field codes syntax.
```

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Mobile Site

Resolved Issues

Mobile Site Now Updated with Family Deletions Made on Main ConnectNow Site

Previously, after the user deleted a family record from ConnectNow Family Directory on the main site, the system did not update the mobile site accordingly with the deletion. As a result, the deleted family record continued to show in the **Family List** when it should not have. We resolved this issue.

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My Own Church

Resolved Issues

General

Missing Topic Links Added to the HELP Menu for My Own Church Administrators

Previously, topic links were missing from the HELP menu in My Own Church for administrators. We resolved this issue. The added links now enable administrators to quickly access the entire collection of topics in the online Help and the context-sensitive About this page Help topics.

My Ministry

Time Shown on Minister's Calendar for One-Time Events Corrected

Previously on the schedule calendar (**My Ministry > Schedules**), one-time events always showed 12 AM (midnight) as the event time instead of the actual time specified for the event. We resolved this issue. The time displayed on a minister's calendar is now correct.

My Family

Removed Ability to Save City and State Values Independently of the Postal Code

To prevent errors in data entry for addresses, the system no longer allows users to save selections for the city and state independently of the postal code. If the user changes the postal code, the system now automatically populates the city and state fields with the associated values.

Changes to the ZIP+4 Postal Code Now Saved

Previously, if the user changed the value in the Plus-4 portion of the **Postal Code** field, the system did not save the change and put it into the Suspense Review log. We resolved this issue. Plus-4 changes are now saved and put into suspense review just like other changes users make to their Family Directory records.

Member Strengths Fields Now Set for Read-Only Display

Previously, the **Member Strength** fields were mistakenly activated, so their content appeared to users as editable when it was read only. Therefore, even though users could type text into the fields, the information could not be saved. We apologize for any confusion caused by this issue. The **Member Strength** fields are set for read-only display and now appear grayed out to clearly identify their content as not editable.

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Conflict Between 'Publish Photo' Checkbox and 'Approve All' Button Resolved

Previously, the **Publish Photo for Pictorial Directory** checkbox control did not work as expected due to a conflict with the **Approve All** button (on the **Administration** > **Suspense** > **Family Directory Updates** page). If the family selected the checkbox to indicate it wanted photos published in Pictorial Directory, the photos did not appear if the administrator approved the family's request by clicking the **Approve All** button. Likewise, if the family chose not to publish photos, clicking the **Approve All** button to approve the change was not successful. We determined the cause of the conflict and resolved it. The two controls now work together as expected.

Add Button No Longer Missing from Member Details

Previously, the **Add** button was missing from **Member Details**, which prevented users from being able to add new family members to their records. The **Add** button is now configured to display in **Member Details**.

My Education

Deleted Members No Longer Appear in the Student List for Online Registration

Previously, names of deleted family members appeared in the **Student** dropdown list, which allowed the user to mistakenly select and then register them in available Religious Education classes. We fixed this issue. Names of deleted members no longer appear in the **Student** list.

My Offering

Download Button for Electronic Statements Now Available

Previously, for organizations that generated electronic contribution statements for members, the **Download** button for electronic statements was not visible on the **Giving History** page in each member's My Own Church portal. As a result, some members could not download their E-statements. We fixed this issue. If an organization enables the E-statement feature, the **Download** button is now visible to all of its members.

Duplicate Contributions Removed from a Family's Giving History

Previously, if a family had a record in multiple organizations, the system may have entered the same contribution into their giving history multiple times. We fixed the issue causing the duplication and removed all duplicate entries from the family's giving history.

Deleted Family Members Removed from Family's Giving History

Previously, deleted family members may have been listed in a family's giving history even though they had no made no contributions. We fixed this issue. Now, a family's giving history shows the names of deleted family members only if they have contributions tied to their member records.

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Family Directory

Updates and Enhancements

Family List

'Add New Family' Button Now Disabled After the User Selects the Desired Family

Previously during the add new family process, the **Add New Family** button remained active after the user found and selected the desired family from the **Find Family Search** results grid. Users were confused by the active state of the button and mistakenly clicked it, believing that was the next appropriate step in the process. Clicking the button then led them to unintentionally add a duplicate record for the selected family in their parish data. To prevent duplicate records, we disabled the **Add New Family** button after the user selects the desired family from the search results.

Family Details

Total Pledged Amount in Family's Giving History Now Reflects Pledge Adjustments

Previously, if the user made an adjustment to a family's pledge in the DDM desktop application, the change was not passed to ConnectNow and reflected in the family's giving history when it should have been. We resolved this issue. Changes to a family's pledge made in the DDM desktop application are now reflected in the **Total Pledge Amount** column in the family's giving history in ConnectNow.

Country Selection and Postal Codes Now Default to Selected Organization's Country Location

To improve the user experience for all customers, address information no longer defaults to U.S. When users enter new address records in Family Details, the system defaults the country and address information to the currently selected organization.

Resolved Issues

Family List

Conflict between Fuzzy Search and Advanced Filter Functions Fixed

Previously, when the user filtered the **Family List** using both fuzzy search and advanced filters, the filter combination caused a conflict. Specifically, the advanced filter settings were lost when the data was exported, resulting in incorrect data in the **.csv** file. We found and fixed the cause of the filter conflict.

System No Longer Rejects q.com Email Addresses

Previously, the system did not allow users to add new families that had an email address in the following form: *emailaddress*@**q.com**. The system returned an error indicating that the email address was not valid. We resolved this issue. The system now accepts **q.com** email addresses.

New Requirements Imposed on U.S. and Canadian Custom Postal Codes

Previously, the system allowed users to save custom postal codes to the database without specifying the associated city and state. The missing data caused problems for users when they attempted to generate certain reports and save records. To prevent problems, we changed the requirements for adding custom postal codes. If the United States or Canada is selected for the country, users must now specify values in three fields: **City**, **State**, and **Postal Code**. If information is missing from any one of these fields, the system prompts users to provide it before allowing them to save a new postal code.

Character Limit Now Imposed on Postal Code Field for U.S. and Canadian Users

Previously, the **Postal Code** field in the **Postal Code Search** window had a 250-character limit. To prevent U.S. and Canadian users from accidentally entering more than the required number of characters, we changed the character limit on the field based on the country selected, specifically:

- United States: five-character limit

- Canada: six-character limit

- All other countries: variable length; 250-character limit.

User Permissions Now Control Availability of the Add and Import Member Buttons

We added controls to disable the **Add** and **Import** member buttons for staff users who do not have Add/Edit permissions for Family Directory assigned to their login credentials.

Deleted Families No Longer Appear in Fuzzy Search Results

We resolved an issue that occasionally caused deleted families to appear in the search results grid after the user performed this exact sequence of actions: 1) conducted a fuzzy search, 2) cleared the search criteria from the fuzzy search box, and 3) pressed **Enter**.

Postal Code Window No Longer Opens Then Quickly Disappears in Chrome

Previously in Chrome, when users tried to edit a postal code mapped to multiple cities, the postal code window for selecting the city opened and then quickly disappeared. We fixed this issue. The window now remains open to enable users to select the correct city.

Fuzzy Search Process Modified to Enable Fuzzy Searches of Integer-Only Fields

We modified the fuzzy search process so that it now treats searches of integer-only fields (for example, the **Phone Number**) as fuzzy searches—not exact searches. Previously, the process looked for exact matches to the user's integer input, which seldom returned results.

'Find Family' Search Now Shows Details for Families Not Owned by the Selected Organization

Previously during the **Add New Family** process, when the user searched for a family to add, no details were provided for families and members not owned by the logged-in user's organization. We resolved this issue. The system now loads names and details for such families into the **Find Family** search window. The user can view the information to identify which families and members they want to add.

Same-Name Conflict for Non-Global Mail Merge Templates Resolved

Previously within a diocese, the system did not allow users in different parishes to save non-global mail merge templates with the same name. We resolved this issue.

Moving Family to a New Organization No Longer Changes a Deceased Member's Status to Active

Previously, after the user moved a family to a new organization, the system changed the status of any deceased family members from **Deceased** to **Active** when it should not have. We resolved this issue. After a family is moved from one organization to another, the status of any deceased family member remains unchanged.

Warning Added to Alert Users That the Family Selected to Be Added Already Has a Record

We added a warning that displays during the Add New Family search process whenever an administrator selects a family that has an active record in the organization. The warning, which is designed to prevent the family from being accidentally registered or unregistered, reads as follows:

```
This family already exists in your Organization. If you need
to make changes to this family, we recommend you access their
record from Family List.
```

CSV Export File Preserves Sort Settings Applied to Family List Grid

Previously, when the user exported records from the **Family List** grid to a **.csv** file, the system did not preserve the grid's sort settings. We resolved this issue. When data in the **Family List** grid is sorted and exported to a CSV file, the sort order is now maintained.

Family Details

Country and Postal Code Fields Now Default to the Currently Selected Organization's Location

To improve usability of the address lookup feature, we customized the country and postal code fields to default to the location of the currently selected organization. Now, when users conduct a search before adding a new family, the system retrieves address data specific to the country in which their organization is located.

System No Longer Retains Family's Envelope Number from the Prior Organization

Previously, after the user moved a family to a new organization, the system sometimes retained the family's envelope number from the prior organization when it should not have. We resolved this issue. After a family moves to a new organization, the system removes the envelope number assigned by the previous organization to allow the new organization to make its own envelope assignment.

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Postal Code Search Process Modified

Previously when the user entered fewer than the required number of postal code characters into the **Postal Code** field, the system automatically selected a postal code, which occasionally resulted in the user saving the wrong postal code to the database. To minimize the risk of saving incorrect postal codes, we modified the postal code search process. Now when the user enters a partial postal code, the system opens the **Postal Code Search** window where the user can enter additional search criteria or change the criteria to locate the correct postal code.

Postal Code Search Process Modified to Improve Efficiency

After adding the ability for users to identify the country location (see next entry in this document), we redesigned the postal code search process to make it faster and more efficient. Note the following changes:

- On each of the three address tabs (**Home**, **Mailing**, and **Other**), users must first select a country from the **Country** dropdown list.

  After the country is selected, the system does the following:

  ❖ If the user selects **United States, Canada**, or **New Zealand**, the **State/Region** field is enabled and populated with the states or regions associated with the selected country.

  Note

  In a future release, we will add State/Region options for countries other than the United States, Canada, and New Zealand.

  ❖ If the user selects **New Zealand**, the **City** and **Suburb** fields are linked to allow users to select the correct **City-Suburb** match.

- At any point in the process, if the user changes the **Country** selection, the system clears the value from the **State/Region** field. The user must then re-select the state or region (for the United States, Canada, or New Zealand) or re-type a new value (for all other countries) in the field.

Country Field Changed from Pre-Selected Value to a Dropdown List of Supported Countries

Previously on the three address tabs (**Home**, **Mailing**, and **Other**) in Family Details, **United States** was the pre-selected value in the **Country** field. We redesigned the **Country** field so that it now contains a dropdown list of supported countries so that users can now select the country location. By default, the default country selection is the location of the logged-in user's organization. The user can change the country but must do so before entering other address details.

Postal Code Search Button Added to Each Address Tab

To save you time, we added a **Postal Code Search** button [...] to each address tab in **Family Details**. Clicking this button opens the **Postal Code Search** window where you can enter a postal code to search for matching locations. Note that the button is visible only after you put the record in edit mode.

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Member List

Advanced Filter Settings No Longer Ignored During Export of Member List Data

Previously, when the user filtered the **Member List** by using a combination of fuzzy search and advanced filters, a filter conflict occurred. Results from applying the advanced filter were ignored when data from the grid was exported to a **.csv** file. We found and fixed the cause of the filter conflict.

Reset Grid Layout Button Now Works as Expected

Previously, clicking ![icon] (Reset Grid Layout) did not reset the number of records in the grid back to 10 per page. We corrected this issue. The button now works as expected.

System Now Automatically Updates the Grad Year Field Based on the Date of Birth

During the Add New Family process, the system now automatically updates the **Grad Year** field in a member's record based on the value in the **Birth date** field. Previously, the system updated the **Grad Year** field only after the user did the following: 1) opened **Member Details**, 2) edited the birth date, and 3) saved the date change. Implementing the auto-update feature between the two fields saves time and improves data accuracy.

Enter Key Now Behaves Like the Apply Button in the Advanced Filter Setup

In the Advanced Filter setup, we changed the behavior of the **Enter** key so that it now works the same as the **Apply** button. After making filter selections, you can now press **Enter** or click **Apply** to find records matching your filter criteria. With this change, the behavior of the **Enter** key is now consistent with its use in the Advanced Filter setup for the **Family List**.

Fuzzy Search Logic Now Recognizes the Period (.) Punctuation Mark

Previously, fuzzy searches for only a period (.) failed, causing the system to generate an error. We resolved this issue. You can now successfully search for records by entering a period (.) in the search field.

Member Details

Pop-Up Windows No Longer Interrupt the Process of Adding Parents to Child Records

Previously, when the user added the names of parents to child records, the **Postal Code** or **Birth Place** search window sometimes opened when it should not have, thereby interrupting the user's work. We removed these pop-up windows.

System Automatically Adds Member Records to Families Owned by Other Organizations

Previously, if the user added a member to an unregistered family, the system added the member's record only to the database of the organization in which the member was added, which made the member visible to the unregistered organization only. Now, the system adds the new member record to the database of every organization in which the family has a record. This change enables all organizations the family is associated with to see (for example, in the **Member List** and **Member Details**) the new member's record. We implemented this change to help reduce the risk of creating duplicate records.

Leader Notes and Student Notes Fields Accept Less Than (<) and Greater Than (>) Symbols

On the **Religious Ed**. tab, we resolved an issue that caused the system to hang indefinitely if the user entered text containing the less than (<) or greater than (>) symbol in the **Notes** field in the **Leader Record**, and then changed the view to the **Student Record**, and vice versa. This sequence of actions no longer causes the system to become unresponsive.

Edit Mode Now Required to Enable Edits to Student Notes and Leader Notes Fields

Previously, the system allowed users to enter text into the **Student Notes** and **Leaders Notes** fields on the **Religious Education** tab without requiring them to put the record in edit mode. Changes appeared to be saved but were not. We resolved this issue. Now, both **Notes** fields are initially disabled by default and can only be edited after the user clicks the **Edit Details** button to put the record in edit mode.

System Now Correctly Calculates the Value in the Grad Year Field

The system automatically calculates the value in the **Grad Year** field based on the value in the **Birth Date** field. Previously, if the user changed the date of birth in a member's record, the system incorrectly re-calculated the value in **Grad Year** field. The system now calculates the value in the **Grad Year** field as 18 years—instead of 19 years—after the date of birth.

Tab Key No Longer Loses Input Focus

We resolved an issue that caused the **Tab** key to lose focus when the user was navigating through the fields of a new member's record. Previously, after the user selected a value for **Role** and then pressed the **Tab** key to advance to the **Status** field, input focus was lost. The user can now successfully navigate through the fields using the **Tab** key.

Ethnicity Information No Longer Missing from Some Member Records

Previously in some member records, the **Ethnicity** field was blank even though the information was available in the organization's database. We resolved this issue. If available, the **Ethnicity** field now records the member's ethnicity.

Class List Order Corrected

Previously when the user added a class (using the Add Class feature on the **Religious Ed.** tab), the displayed list of classes was sorted in a somewhat random order. We fixed this issue. The class list is now sorted in alphanumeric order: numbers followed by letters in order, either numerically or alphabetically.

Adjusting the Zoom Level on the Sacraments Tab No Longer Changes Row Alignment

Previously after the user adjusted the browser's zoom level, rows in the table on the **Sacraments** tab became misaligned. This issue, which occurred at various zoom levels in multiple browser environments, was resolved. The row alignment no longer changes if the user adjusts the zoom level.

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Process Used to Edit Social Security Numbers Modified

We modified the process used to edit a social security number that was entered incorrectly into a staff member's record.

Previously, only the last four digits of the member's social security number were revealed in the **Soc Sec #** field. To correct the entire number, the system allowed the admin user to change any one of the nine individual digits. For security purposes, the last four digits of the social security number are no longer revealed. The field is now entirely blank. To edit a social security number, the user must now enter all nine digits into the **Soc Sec #** field.

Error Message Displayed in the Wrong Context Removed

Previously, while attempting to edit the record of a member who had a duplicate marriage record, users received the following error message: `Cannot Edit Marriage Record`. This message was removed because it was displayed in the wrong context, and therefore confusing. Users should not have received a message about edits to a marriage record when attempting to edit the Member Details record.

Sacraments

Spouse's Member Record Now Updated to Reflect Marital Status Change

We resolved an issue that prevented the system from updating the spouse's marital status (from **Single** to **Married**) in Member Details if the spouse's record was linked to the marriage record after it was created. Now, if the spouse's record is linked to the marriage record after the marriage record is created, the system automatically changes the setting in the **Marital Status** field to **Married**.

Names and Addresses of Custom Organizations Can Now Be Added to Sacramental Certificates

Previously, when using Mail Merge to create sacramental certificates for a custom organization, users could not print the organization's name and address on the certificate because the data was not available for the system to merge. We found and fixed the cause of this issue. Mail Merge now pulls name and address data for custom organizations so that this information can now be printed on certificates.

Ability to Copy & Paste into Parish Field Now Blocked

The system no longer allows users to copy and paste the name of a parish into the **Parish** field in a sacrament record. Pasted data cannot be directly linked to the organization, which causes numbers in reports that retrieve data from the **Parish** field to be inaccurate.

To ensure that a sacrament record is correctly linked to the parish location, click [...]. This button is located to the right of the **Parish** field, as shown in this illustration:

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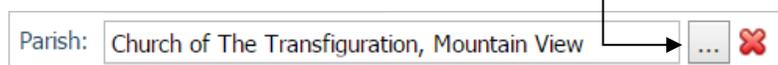
Saving a Marriage Record After Linking Spousal Records No Longer Produces a Timeout Error

Previously, the user experienced a timeout error after linking member records for the spouses, adding a celebrant, and then trying to save a new marriage record. We fixed this issue. The user can now successfully perform this sequence of actions without experiencing a timeout error.

Mail Merge Process No Longer Produces Multiple Sacrament Certificates for Certain Members

Previously when the user selected certain members from the **Sacraments** grid and then clicked the **Merge Selected Records** button, the merge output sometimes contained more sacrament certificates than expected. That is, for some members the system created multiple certificates. In this instance, we determined the cause of the duplicates and eliminated them.

Be aware that when you generate baptism certificates for members who have had multiple marriages, the system will, in fact, create multiple certificates—one for each marriage record. In this instance, however, the duplicates are expected and not due to error because, by design, some variants of the baptism certificate include marriage information.

Family Workgroups

Record Count Displayed in 'Deselect all records' Link Corrected

Previously, the system displayed the wrong record count in the **Deselect all records** link, located at the top of the **Families in Workgroups** grid. We corrected this issue.

View Recipients Window Now Shows Email Addresses of Families in Selected Workgroup

We resolved an issue that caused the system to load the email addresses of recipients in the previously selected family workgroup into the **View Recipients** window. The system now loads the email addresses of families in the currently selected workgroup.

System No Longer Generates Blank Quick Reports

Previously, the system sometimes generated blank quick reports (mailing labels and mailing lists) for certain members selected from the **Families in Workgroup** grid on the **Family Workgroups** page.

Organization Dropdown List No Longer Empty

For some organizations, the Organization dropdown list contained no values. This issue prevented users from being able to select an organization and then view the names of families belonging to family workgroups. Additionally, a search for new members to add to workgroups produced no results. We resolved these issues.

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Member Workgroups

Members in Workgroups Grid Now Passes Data for Selected Members to the Quick Reports

We resolved an issue that sometimes prevented the checkbox controls in the **Members in Workgroups** grid from working. Previously, when the user selected members in the grid and then tried to run quick reports, the system occasionally did not pass the data in the grid to the reports. As a result, the reports were blank.

Duplicate Names Now Hidden in Members in Workgroups Grid

Previously, members with more than one membership record in an organization appeared multiple times in the **Members in Workgroups** grid. To prevent confusion, the system now automatically filters the names and loads unique ones only into the grid.

Record Count Shown by 'Deselect all records' Link Corrected

We resolved an issue that caused the **Deselect all records** link in the **Member Workgroups** grid to display an incorrect record count.

The **Deselect all** link now shows the correct number of records.

View Recipients Window Now Showing Email Addresses for Selected Workgroup

We resolved an issue that caused the system to load the email addresses from a previous member workgroup into the **View Recipients** window. The system now loads the email addresses of members in the currently selected workgroup.

'Delete selected records' Button Now Working as Expected

Previously, the **Delete selected records** 🚫 button did not work correctly. When clicked, the button deleted only the member records on the page of the grid the user was currently viewing when it should have deleted all selected records. We resolved this issue.

Character Limit Increased for Names of Member Workgroups

Previously, the system enforced a 20-character limit on names for member workgroups. We increased the limit to 100 characters, which is the same as the limit for **Family Workgroup** names.

Organization Dropdown List No Longer Empty

For some organizations, the Organization dropdown list contained no values. This issue prevented users from being able to select an organization and then view the names of members belonging to member workgroups. Additionally, a search for new members to add to workgroups produced no results. We resolved these issues.

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Reports

General

Page Load Speed and Page Display Performance for Reports Further Improved

We made performance improvements over previous versions of ConnectNow Family Directory to speed up the time it takes the system to load reports into the Report Viewer and display individual pages within a generated report.

Sacrament

Bride's Last Name Corrected in Marriage Register Report

We fixed the issue that caused the maiden name of the bride's mother to show as the bride's last name in the **Marriage Register** report.

Names of Custom Organizations Now Appear in Baptism Location Field

Previously, the **Baptism Location** field in sacrament reports, such as Marriage, First Eucharist, and Confirmation, did not contain the name of the organization if the organization was added as a custom organization. We fixed this issue. Where appropriate, sacramental reports now show the name of a custom organization in the **Baptism Location** field.

Baptism Details for a Spouse Now Available in the Marriage Register Report

Previously, the **Marriage Register** report was missing a spouse's baptism details if those details were manually entered into the marriage sacrament record. We fixed this issue. Baptism details recorded manually for a spouse are now included in the report.

Calculation Used to Determine Member's Age at Death Adjusted in Funeral Report

Previously, the system sometimes calculated the member's age at the time of death incorrectly in the Funeral report. The report calculated age of death based on the year of birth and year of death only, which sometimes resulted in a different age from that shown in the member's record for the same birth and death dates. For accuracy, we revised the calculation so that it now uses the full date of birth and date of death to determine the member's age at death.

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Count Discrepancies for Deaths Corrected in Kenedy Statistics

Previously, the amount shown for **Total Deaths** in the **Census Summary** section differed from the number of death records listed in the details window, displayed by clicking the numbered link. The logic used to calculate total deaths and the number of death records was different, which caused this discrepancy. We fixed this issue. The number in the **Total Deaths** field and the number of records in the details window now match.

Age Limit for Members in the Children Category Extended in Parish Statistics

Previously, members between the ages of 0 and 6 were counted as children in the Parish Statistics report. This release extends upper age limit of the Children category to 17 years. Therefore, to count as a child in this report, an individual's age must be between 0 and 17.

The new age calculation changes the counts in categories in the **Household Member Statistics** section of the report that include children, such as **Households with children**.

Count Discrepancies for Baptisms Corrected in Kenedy Statistics

We fixed a discrepancy between the baptism count shown for each group listed in the **Receptions into the Church** section and the count reported in the associated group's detailed report. The calculation was revised. The counts shown now match and are correct.

Student Count Discrepancies Corrected in Kenedy Statistics

We fixed a discrepancy between the count reported for each student category in the **Religious Educations** group and the number of student records contained in the corresponding detailed report. The total counts now match the detailed reports for each of the following categories: Elementary Students, High School Students, and Total K-12.

Registration Status Filters in Registration Forms Report Now Working

Previously in the Registration Forms report, the registration status filters pulled families with a record both in the selected organization and in all other organizations within the diocese. The filters should have pulled families with records in the selected organization only. We resolved this issue. If a family does not have a record in the selected organization, it is not included in the report.

Order of Member Listings Revised in the Parish Directory

Previously, member listings in the Parish Directory report were ordered by Member DUID, which made it hard for users to locate member information. To enable more efficient searches, we reorganized the directory to sort alphabetically by name of the member whose role is Head, Husband, or Wife. Children are listed in chronological order by age within a member's listing.

'No Family Group' Option Now Available in Setup for the Parish Directory

Previously, the **No Family Group** option was missing from the **Family Options** group in the setup for the Parish Directory report. We added this option to allow the user to include families in the report that do not belong to a family group.

Members of Unregistered and Unowned Families Now Appear in the Parish Directory

We resolved an issue that prevented members from appearing in an organization's Parish Directory report if their families were not registered to the selected organization or if the selected organization did not own the family record. Now, when the **Include Members** checkbox is selected, the report includes members who have a record in the selected organization even if their families are not registered or owned by the organization.

First Names Now Sorted Alphabetically in the Parish Directory

We resolved an issue that prevented first names of families listed in the Parish Directory report from being sorted alphabetically. The report now lists families in alphabetic order by last name followed by first name in alphabetic order.

Names of Deleted Family Members Removed from Parish Directory Report

We resolved an issue that caused the names of deleted family members to appear in the Parish Directory report.

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Religious Education

Updates and Enhancements

Tools

Holiday Calendar Dates Extended

Previously, the Holiday calendar ended in the year 2017. We extended the calendar to add holiday dates up to and including the year 2021.

Resolved Issues

Dashboard

System Now Saves Edits to a Leader's Member Record Without Error

Previously, the system did not save edits to a leader's member record if the **Role** field was not set to one of the following: **Head**, **Husband**, or **Wife**. We removed this requirement. The system now saves changes to a leader's member record even if no family member is assigned to one of those roles.

Student Directory

Class Links in the Student Directory Grid Now Consistently Display the Correct Class

Previously after the user applied one of the alphabetic filters to the **Student Directory** grid and then selected a student's class link (in the **Class** column), the system sometimes displayed the wrong class. We resolved this issue.

'Clear Unchecked' Link in the View Recipients Window Now Working as Expected

Previously, clicking the Clear Unchecked link in the **View Recipients** grid did not work as expected. Clicking the link should have removed deselected (unchecked) email recipients only, but it removed all recipients. We resolved this issue. The link, when clicked, now removes just the recipients the user deselected.

Layout Settings Applied to the Student Directory Grid Now Passed to the .csv File

Previously when the user exported data from the **Student Directory** grid to a **.csv** file, the system did not pass the layout settings currently applied to the grid to the file when it should have. We fixed this issue. The system always uses the current grid layout in the exported **.csv** file.

System Now Updates Class Enrollment Count Immediately After a Student Transfer

Previously, after the user transferred students from a class, the enrollment count for the transferred-from class did not update immediately. The system decreased the enrollment count only after the user refreshed the page. We resolved this issue. After a student is transferred from a class, the system immediately decreases the enrollment count of the class from which the student was transferred.

Sort Function on Age Column Now Works Correctly

Previously in the **Add Students** window, the sort function was not working correctly when applied to the **Age** column in the **Selected Students** grid. We fixed this issue. The grid now sorts age data correctly.

Classes

'Clear Unchecked' Link in the View Recipients Window Now Working as Expected

Previously, clicking the Clear Unchecked link did not work as expected to remove deselected email recipients from the **View Recipients** grid. We resolved this issue.

Changes Made to Improve Page Load Speed

We made operational and process improvements to shorten the time it takes the system to display the **Classes** page and to load the information for a class after the user selects or deselects a class on the **Class List** tab.

Grades List Order Corrected

Previously, when the user selected to view classes on the **Class List** tab by grade (**View By** > **Grade**), the grades in the list were displayed in the wrong order. We fixed this issue. The grades are now correctly ordered, starting with grades in ascending numerical order followed by grades in ascending alphabetic order.

Deceased Members Removed from People Records Grid for the 'Add New Leader' Process

The **People Records** grid, displayed during the Add Leader process, is used to select people from your membership records to serve as leaders. Previously, the grid contained the names of deceased members when it should not have. All deceased members were removed from the grid to prevent them from being selected as leaders.

Class Header Information Now Updates Correctly When a Different Class Is Selected

Previously, the header shown at the top of the right panel did not update completely to match the information for the class the user selected on the **Class List** tab in the left panel. The header retained some information for the previously selected class. We fixed this issue. The header information now matches the class selected on the **Class List** tab.

'Oops' Error Experienced When Attempting to Print Mailing Labels Resolved

Previously, when the user selected the Select All checkbox (in the grid header or within a group) on the **Class List** tab and then attempted to create mailing labels, the system experienced an `Oops` error. We resolved this issue.

Sort Function on Age Column Now Works Correctly

Previously in the **Add Students** window, the sort function, when applied to the **Age** column in the **Selected Students** grid, did not work. We resolved this issue. You can now view the list of students by age data in ascending and descending order.

Student Counts for Classes on Class List Tab Corrected

Previously when the user set the **View By** filter on the **Class List** tab to **Grade**, the student count for classes listed on the tab was not correct. Additionally, no category existed for students without a grade assignment, so a count of those students could not be reported. We fixed these issues. The student counts by class per grade are now accurate. In addition, we added a new grade category, labeled **Unassigned**, to report the number of students assigned to no grade.

Web-Based Email No Longer Generates an Error

Previously, users experienced the following error when attempting to send web-based emails from the **Classes** page: `Invalid Character Combination Entered`. This error no longer occurs.

Leaders

Duplicate Records Eliminated from Leaders Grid

Previously, the record displayed in the last row on Page 1 of the **Leaders** grid was duplicated in the first row on Page 2. The duplication caused the system to drop the last record from the entire grid, which in certain situations prevented that leader from receiving the user's email. We determined the cause of the duplication and fixed the issue.

Column Sort Function Now Working

Previously, the ascending order sort function, when applied to the **Leader Name** column, did not work. We resolved this issue. You can now sort the names in ascending order.

Leaders Grid Now Displays All Records Correctly After the Initial Load

Previously, when the user set the **Leaders** grid to display more than 25 records, the system only displayed the first 25 records correctly. The data in all remaining records was replaced with a comma (,). Similarly, if the user displayed a **Leaders** grid consisting of multiple pages, records on the first page displayed correctly, but those on all subsequent pages contained no data. We resolved these issues. The **Leaders** grid now displays records correctly no matter how many records or pages are in the grid.

ConnectNow Version 4.4.0 Release Notes _last updated August 8, 2017

People Records for 'Add New Leader' Process Updated to Exclude Deceased Members

The **People Records** grid, displayed during the Add Leader process, is used to select leaders from your member records. Previously, the grid mistakenly contained the names of deceased members. We removed deceased members from the grid to prevent you from accidentally selecting them as leaders.

View By > Class Filter Now Shows Correct Leader Counts for Classes

We resolved an issue that caused the leader counts on the **Class List** tab to be incorrect when the user selected the **View By > Class** option.

Calendars

Right-Click Menu Removed from All Calendars in the Religious Education Module

You may have noticed that right-clicking a calendar in the Religious Education module displayed a menu with disabled options. Because the options were not intended to display, we removed the right-click menu from all calendars in the module.

Reports

System No Longer Populates Registration Forms with Information from Deleted Records

We fixed an issue that caused the system to create registration forms populated with information from deleted member records.

Grade Name Sort Now Working in Setup for Class Rosters & Schedules Report

We resolved an issue that prevented the **Grade Name** sort option in the setup for the **Class Rosters & Scheduling** report from working. When the user selected **Grade Name (Order defined in Lookup Management)**, the report listed classes in alphabetic order by class name instead of in grade name order. The sort option is now working as expected.

Tuition DUE/PAID Section No Longer Missing from Populated Registration Forms

Previously, the **Tuition DUE/Tuition PAID** section at the bottom of the populated registration forms report appeared on the first form only. We resolved this issue. The section now appears on all forms in the report.

Page Load Speed and Page Display Performance in Report Viewer Improved

We made performance improvements over previous versions of ConnectNow Religious Education to speed up the time it takes the system to both load reports into the Report Viewer and to display individual pages within the reports.

ConnectNow Version 4.4.0 Release Notes _last updated August 8, 2017

Tools

Page Title Changed

For consistency, we changed the title of the **Configurations > Systems Calendar** page to **Holiday Calendars**. The page title and the option for the page on the **Tools** menu now match, as shown in this illustration:
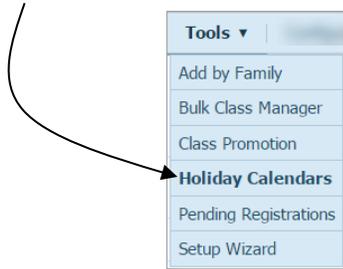
Sort Function Now Working as Expected When Applied to Family Column

Previously, the sort function—when applied either in ascending or descending order to the **Family** column in the **Pending Registrations** grid—did not sort the names alphabetically. We fixed this issue.

Discrepancy in the Reporting of Pending Registration Counts Fixed

Pending registration counts for Religious Education classes are reported both on the **Home** and **Pending Registrations** pages. Sometimes the reported counts were different. We found and fixed the cause of the discrepancy.

Deceased Family Members Removed from Grid in the Add by Family Process

Previously, the names of deceased family members appeared in the grid that was displayed during the **Add by Family** process. This error made it possible for users to select deceased members and add them to Religious Education classes. To prevent mistaken selections, we removed the names of deceased family members from the grid.

Bulk Class Manager Page No Longer Hangs While Loading

We resolved an issue that caused the Bulk Class Manager to hang while loading if any classes on the page contained special characters in their names.

Configuration

Status Setting for an Open Term No Longer Changes Automatically

Previously for an open term, when the user clicked the **Manage Status** button to open the **Term Status** window, neither status option (**Open** or **Closed**) was pre-selected to show the term's status. If the user clicked the **Save Status** button, the system automatically changed the term's status to **Closed** even though the user made no selection. The issue was resolved as follows:

- When the **Term Status** window opens, the **Open** or **Closed** option is now pre-selected so that the user is immediately informed of the term's status.

- Clicking the **Save Status** button saves the selected status.

ConnectNow Version 4.4.0 Release Notes _last updated August 8, 2017

Offering

Resolved Issues

Funds

Lack of Permissions to an Organization's Funds Page No Longer Forces Logout

Previously, if users changed to an organization for which they lacked permissions to the **Funds** page, the system forced them to log out. We resolved this issue. Page access is now controlled at the organization level. The system now checks the user's permissions to the page or function and displays only the organizations for which permissions are granted in the Organization dropdown list.

Batches

Ability to Delete Committed Batches Modified

Previously, after a user deleted all contributions in a committed batch and then tried to delete the batch itself, the system experienced an error. We modified the delete function to allow the user to delete a committed batch if the batch contains no contributions.

Using the Underscore Character in Batch Descriptions Is Now Permitted

Previously, the system displayed a warning if users created batch descriptions containing the underscore character (_). We resolved this issue. An underscore is now permitted in batch descriptions.

Pledges

System Now Updates the Pledge Record Correctly After the Down Payment Is Edited or Deleted

We fixed an issue that prevented the system from updating the pledge record correctly after the user deleted or edited the down payment made toward the pledge. The pledge record now updates correctly to reflect changes to the down payment.

ConnectNow Version 4.4.0 Release Notes _last updated August 8, 2017

Posting

Detailed

Cursor No Longer Loses Focus During Contribution Posting Process

Previously during the posting process, the cursor sometimes lost focus and either disappeared or returned to a previous field. We resolved this issue.

'Valid Currency Value' Error Experienced During Contribution Posting Removed

Previously after changing batches during the posting process, users were sometimes prompted to choose a valid currency value. This prompt was confusing and not appropriate to the user's situation. Therefore, we removed it.

Blank Option Added Back to the Pledge Dropdown List

Previously, the blank option, which appeared as the first selection, was missing from the **Pledge** dropdown list. Because the option was missing, users were prevented from being able to disassociate a contribution from a pledge. As shown below, the blank option was added back as the first selection in the dropdown list.

The blank option was added back to the Pledge dropdown list.
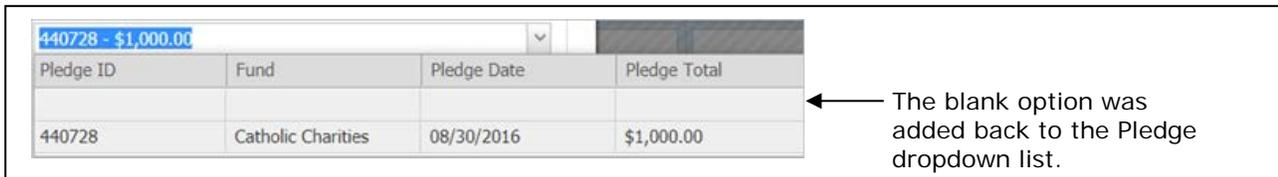
Quick Entry

Member's Names No Longer Duplicated in Search Results for Quick Entry Posting

Previously, the names of some members appeared multiple times in the search results displayed for the Quick Entry Posting process. We found and fixed the cause of the duplication.

Transaction Amounts Now Total Correctly in the Quick Entry Batch Report

Previously, if a batch contained more than 25 transactions, the batch report showed an incorrect **Total Given** amount. The amount shown did not match the **Total Entered** amount on the quick entry batch form when it should have. We found and fixed the cause of the discrepancy between **Total Entered** and **Total Given** amounts.

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'Not Found' Error Message Updated to Provide Family or Member Details

Previously, if the user deleted a family (or member) from the system after the family's contribution was posted to a quick entry batch, the system displayed this message when the user attempted to commit the batch containing the contribution: `Family not found or invalid.`

This message alerted the user to the cause of the problem but did not provide enough detail to help the user fix it. We updated the error message to provide the name of the family to help users troubleshoot the issue.

Name Lookup Window No Longer Disappears During Quick Entry Posting

We resolved an issue that caused the **Name** lookup window to open for a few seconds and then disappear before the user could select a name from the list. The window now remains open until the user selects the desired name or clicks outside the window to close it.
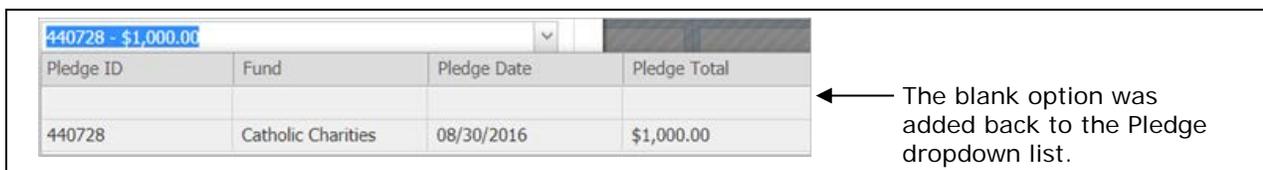
Contribution List

'Characters Left' Counters in the Edit Contributions Window Now Updates Correctly

We resolved an issue that prevented the **Reason** and **Memo** fields from correctly updating the "characters left" counters in a newly opened **Edit Contributions** window. When a new window opened, the system did not refresh the counts, showing instead "characters left" counts from a previously opened window.

Blank Option Added Back to the Pledge Dropdown List

Previously in the **Edit Contribution** modal, the blank option, which appeared as the first selection, was missing from the **Pledge** dropdown list. Because the option was missing, users were prevented from being able to disassociate a contribution from a pledge. As shown below, the blank option was added back as the first selection in the dropdown list.

The blank option was added back to the Pledge dropdown list.

Giving History

Deleted Members with No Contributions Removed from a Family's Giving History Profile

Names of deleted family members are now included in a family's giving history profile only if those members have contributions tied to their records.

'Include Member Contributions' Checkbox Removed from Members Tab

We removed the **Include Member Contributions** checkbox control from the **Filter Options** section on the **Members** tabs in **Giving History**. The checkbox control was not necessary, and when selected, showed incorrect contribution totals for the selected member. For these reasons, we removed it from the tab.

Giving History Grid Now Loads All Pages

We resolved an issue that caused the **Giving History** grid to show the first page of contribution records only. If the grid contains more than one page of records, the system now displays all pages in the grid.

ConnectNow Version 4.4.0 Release Notes _last updated August 8, 2017

Import

Failure Counts Shown in the Import Summary and Import Report Corrected

We resolved an issue that caused the Import Summary and Import report to show a different failure count/rate for items in the Online Giving import file. The system now correctly counts and reports the items in the file that it could not successfully import.

System No Longer Processes Contributions to ConnectNow Funds with Past End Dates

Previously, the system processed Online Giving contributions to ConnectNow funds whose end date had passed when it should not have. We resolved this issue. The system no longer imports contributions to funds whose end dates are in the past. The Import Summary report documents the failure to import and provides an explanation why.

Date Range Shown in Import Summary Section Corrected

Previously, the date range shown in **Import Summary** section was inaccurate. The date range included start dates for pledges in the import file when pledge dates should not have been included. We corrected this issue. The date range shown encompasses the start and end dates for contributions in the import file only.

'Quick Give' Contributions in Online Giving Import File No Longer Converted to Pledges

We resolved an issue that caused the system to create pledge records in ConnectNow Offering for all contributions imported from Online Giving with a gift type defined as **Quick Give**. The system now does the following:

- If the fund to which the quick-give contribution is made requires a pledge, the system imports the contribution and creates a $0.00 pledge to the fund.

- If the fund to which the quick-give contribution is made does not require a pledge, the system imports the contribution directly and creates no pledge record.

Files Containing Contributions to Pledge-Required Funds Can Now Be Imported Successfully

Previously, when attempting to import a file containing contributions to funds marked as requiring a pledge, the user experienced an error. We fixed this issue. Import files containing contributions to funds requiring a pledge can now be imported successfully.

Prompt Added to Alert Users When a Mismatched Pledge Total Is Found

We added a prompt to the Online Giving to ConnectNow Offering import process to alert users when the system discovers a discrepancy between pledge totals for system-matched or user-matched pledges. The prompt includes a feature that enables users to apply an adjustment to make the pledge totals match or to keep the pledge totals unchanged. Users are also given the option of opting out of receiving the notifications, which the system can display every time it discovers a mismatched pledge total.

System No Longer Changes Contribution Type to Cash in the Online Giving Import File

Previously, the system changed the contribution type of all items in the import file to "cash" when it should not have. We resolved this issue.

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Reports

General

Page Load Speed and Page Display Performance for Reports Further Improved

We made performance improvements over previous versions of ConnectNow Offering to speed up the time it takes the system to both load reports into the Report Viewer and to display individual pages within reports.

Contributions

Contribution Summary Report Fixed to Include Family-Member-Only Contributions

Previously if during the date range period specified in the setup for the **Contribution Summary** report, contributions were made by individual members only, the report omitted the member contributions. These omissions resulted in accounting discrepancies between the Contribution Summary report and other reports presenting contribution totals for the same period. We found and fixed the cause of the discrepancies. The Contribution Summary report now takes into consideration all giving during the date range specified, including contributions made by individual family members only.

Generating Large Sets of Labels No Longer Produces a Timeout Error

Previously, some users experienced a timeout error while attempting to generate large sets of labels for contribution statements. We resolved this issue.

'Select All records' Link in the Postings Grid Now Working as Expected

In the setup for the **Contribution Postings** report, the Select All # records link that displays after the user selects the Select All checkbox in the **Postings** grid header is now working as expected. Clicking the link now selects all records in the grid instead of just those records on the currently displayed page.

Font Used for Printed Name on Statements Now Matches User's Font Selection

In the **Contribution Statement** report template, we resolved an issue that caused the system to replace the user's font selection for **Printed Name** with a different font on the printed statement. Now, when the user prints statements, the name appearing below the signature image is printed in the selected font.

Generate Receipts Button Now Active When User Opens Report Page

Previously for the **Canadian Tax Receipts** report, the **Generate Receipts** button did not respond to the first click. The button appeared to be active but was not. We resolved this issue. As soon as the user opens the report page, the button is now active and, when first clicked, generates tax receipts.

Generating Large Sets of Contribution Statements No Longer Produces an Error

Previously, some users experienced a timeout error when attempting to generate a large set of contribution statements. We resolved this issue. Users can now process high-volume jobs without error.
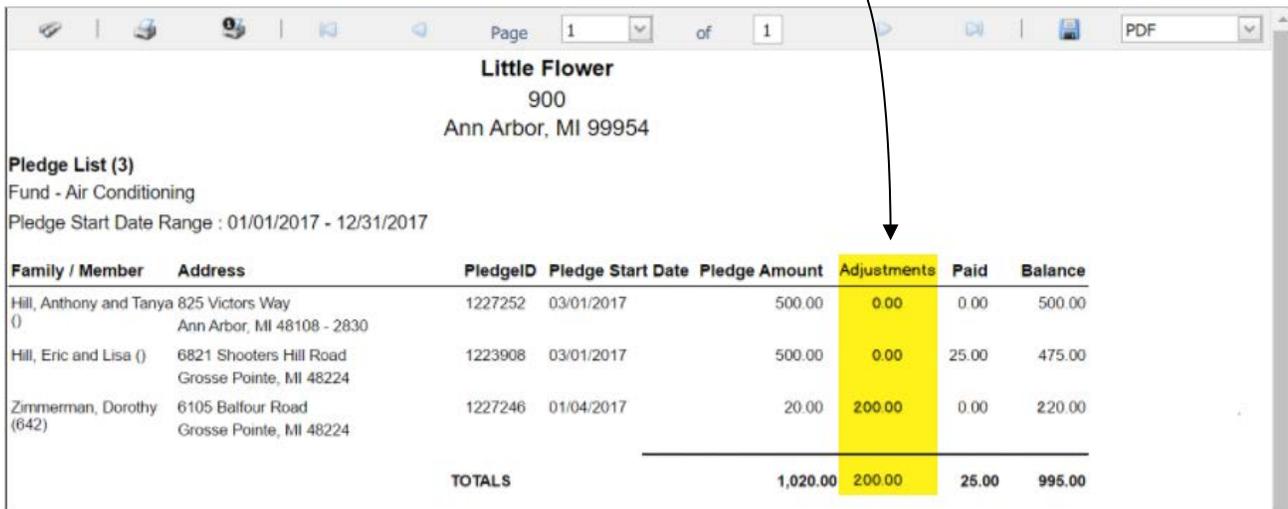
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Generating a New Batch of E-Statements No Longer Erases Previously Generated Statements

Previously when the user generated a new batch of E-statements, the system removed some of the previously generated E-statements instead of adding the newly created ones to the existing batch. We fixed this issue. The report output of a new E-statement job consists of all previously generated statements plus the newly created ones.

Pledges

Adjustments Column Added to Pledger List Report

We added a new column, labeled **Adjustments**, to the **Pledger List** report. This column shows the total dollar amount of any adjustments made to the pledges. As shown in the following illustration, the new column appears between the **Amount** and **Paid** columns in the report.

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Ministry Scheduler

Resolved Issues

Configuration

Public and Private Ministry Icons No Longer Disappearing from Ministries Panel

Previously after the user edited a ministry, the public and private icons next to each ministry in the **Ministries** panel disappeared. We found and fixed the cause of the disappearing icons.

Deleting a Ministry Group No Longer Produces a Timeout Error

We resolved the issue that caused the user to experience a timeout error when attempting to delete a ministry group.

Minister Directory

User-Configured Roles Now Appear As Options in the Advanced Filter's Ministry Role List

Previously in the **Advanced Filter** for Minister Directory, the **Ministry Role** dropdown list did not contain options for user-configured roles when it should have. We fixed this issue. All roles configured by the user for a ministry group now appear as options in the **Ministry Role** dropdown list so the user can select and filter records in the directory on them.

Performance of 'Add New Minister' Process Improved

Previously, the system was slow to add a new minister if the **Minister Directory** grid was set to display 100 minister records per page. We made improvements to the Add New Minister process to make it run faster when the user selects the highest per-page record count.

System Now Passes Filtered Data and Selected Records Only to the Mailing Label Quick Reports

If you filter and then select specific records from the Minister Directory grid, the system now passes the filtered data and the selected records only to the mailing label quick reports. In other words, labels are now generated only for selected ministers who match the filters applied to the grid.

<<End Date>> Merge Field Now Working to Pull Data into Merged Documents

We resolved an issue that prevented the **<<End Date>>** merge field from working as expected to pull End Date data from the database into merged documents.

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Preferences

'Save Grid Layout' Button Now Working As Expected

We resolved an issue that prevented the Save Grid Layout button 💾 from saving the user's column sort changes on the **Preferences** page. The button is now working as expected. Column sort changes now remain in effect even after the user leaves and then returns to the **Preferences** page.

Reports

Unnecessary Space Preceding Minister's First Name Removed from Mailing Labels

Previously, when the user generated mailing labels for ministers with no title (for example, no Mr. or Ms. preceding their names), the system inserted a space before the minister's first name. We removed the unnecessary space so that all labels in the report are left justified.

Ministry Names No Longer Missing in .xls Version of the Ministry Schedule Report

We resolved an issue that caused ministry names to be missing from the **.xls** version of the **Ministry Schedule** report.

Ministry Schedule Reports with No End Date Can Now Be Generated Successfully

Previously, when the user attempted to run a Ministry Schedule report with no end date specified, the report opened in the Report Viewer but contained no details. We resolved this issue.

Tuition

Resolved Issues

Reports

General

Page Load Speed and Page Display Performance for Reports Further Improved

We made performance improvements over previous versions of ConnectNow Tuition to speed up the time it takes the system to both load reports into the Report Viewer and display individual pages within reports.

Customer Activity

Sort Function Now Produces Consistent Results in the Customer Activity Report

Previously in the **Customer Activity** report, applying the sort function produced unexpected and inconsistent results. We fixed this issue. For consistency, information in the report is now always sorted first on the **Invoice Date** and then on the **Invoice Number**.

Fund Activity

Scope of Date Filter Expanded and Column Labels Re-titled to Improve Clarity

Previously, the **Date** range filter for the **Fund Activity** report applied to payment activity only. This caused confusion among users when the generated reports included invoiced amounts that were not in the user-specified date range. To fix this issue, we expanded the scope of the **Date** filter to include both total invoiced amounts and payment activity (such as, customer payments, credits, and write-offs).

In addition, to clarify the function of the **Date** filter, we changed the label text from **Payment Date Range** to **Invoice and Payment Date Range**, as shown in the following illustration:

To emphasize that the information in the report is filtered based on the Date filter values, we also made slight modifications to the label text for these columns in the generated report:

- **Total Invoiced Amount** was changed to **Total Invoiced Amount per Date Range**.

- **Total Paid** was changed to **Total Paid per Date Range**.

- **Balance Due** was changed to **Net Amount per Date Range**. This amount is calculated by subtracting the amount in the **Total Paid** column from the amount shown in the **Total Invoiced Amount** column.

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Invoices Report Now Includes Line Items Appearing on Finalized Invoices Only

Previously, the **Invoices** report included line items the user removed from an invoice before finalizing it. We resolved this issue. The report now includes only those line items saved on an invoice before it was finalized.

Invoice Due Filters Now Working as Expected

Previously, when the user specified a date range in the **Invoice Due** fields, the generated **Invoices** report sometimes contained no data. We found and fixed the cause of this issue. The **Invoice Due** filters are now working as expected.

Credits Applied on Last Day of Month Now Included in Calculation of Balance Due

Previously on Tuition statements generated for a given month, a credited amount (for example, a payment or a write-off) applied to an invoice on the last day of the month was excluded from the balance-due calculation. We resolved this issue so that the balance-due calculation takes credited amounts applied on the last day of the month into account.

Invoice Items Dropdown List Now Visible in Draft Versions of Tuition Invoice

We resolved an issue that caused the **Invoice Items** dropdown list to be missing for invoices previously saved as a draft. The dropdown list is now visible when users view the draft version.

Amount Shown in 'Current Payment Due' Field Corrected

Previously, the amount shown in the **Current Payment Due** field on the Tuition statement was sometimes incorrect. We fixed this error.

Family's Primary Address Now Used on Tuition Statements

Previously for tuition billing, the system used the family's home address instead of the family's primary address. The address appearing on tuition statements is now the family's primary address.

'Select All # Records' Link in the Customers Grid Now Working as Expected

In the setup for the **Statements** report, the Select All # records link is displayed after the user selects the Select All checkbox in the **Customers** grid header. Previously, clicking this link selected the records on the currently displayed page only when it should have selected all records on all pages of the grid. We resolved this issue. The link now works as expected.

Overdue

Write-offs Dated After Invoice's Final Due Date Now Reflected in Overdue Report

Previously for invoices with a payment plan, the system did not update the **Overdue** report if a write-off was applied after the final due date of the invoice. We fixed this issue. If a write-off is applied to an invoice with a payment plan, the system now considers the amount of the write-off and correctly calculates the overdue payment amount in the report.

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Diocesan Development

Resolved Issues

Parish Reports

PDF Version of Parish Master Report Updated to Show Negative Pledge and Contribution Amounts

Previously, negative amounts for pledges and contributions displayed differently in the **.csv** and **.pdf** versions of the Parish Master report. In the **.csv** version, negative amounts were shown in parentheses while in the **.pdf** version, negative amounts were not shown at all. We revised the **.pdf** version of the report to indicate negative amounts by preceding them with a minus (-) sign. The method used to represent negative amounts in the **.csv** version of the report remains unchanged: negative amounts are enclosed in parentheses.

Truncated Column Names Fixed in .csv Version of the Parish Refund Shortfall Report

In the **.csv** version of the exported Parish Refund Shortfall report, the following columns shifted to the left and their names became truncated: **Refund Anticipated** and **Shortfall Anticipated**. We fixed this issue.

Non-Givers No Longer Marked As Unregistered in .csv Version of the Parish Master Report

We resolved an issue that caused the system to mark all non-givers as unregistered in the exported **.csv** version of the Parish Master report.

Donor Reports

Added Ability to Generate a Canadian Tax Receipt or Contribution Detail Statement for One Family Only

Previously, the system generated a `System Error` if the user tried to enter the same **Family DUID** in the **form** and **to** fields. Because of this error, users could not generate a Canadian tax receipt or Contribution Detail Statement for just one family. We resolved this issue. You can now generate a Canadian tax receipt or a contribution statement for one family by entering the same Family DUID in both fields, as shown in the following illustration:

Entering the same Family DUID in the **from** and **to** fields enables you to generate a tax receipt or contribution statement for one family only.

IQ
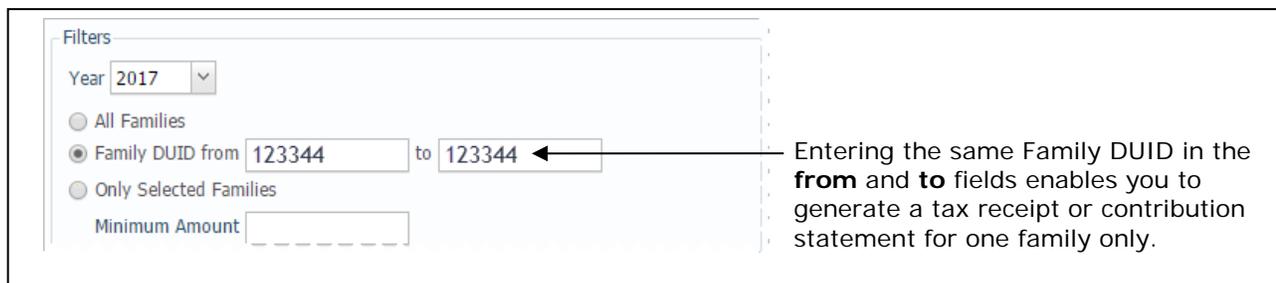
Resolved Issues

### Family > Primary Publish Columns Removed from the Column Picker Panel

We removed the following columns from the **Column Picker** panel:

- **Families > Contact Info > Primary Publish Address**

- **Families > Contact Info >Primary Publish Email**

- **Families > Contact Info >Primary Publish Phone**

We determined that building a query using these columns produced an incomplete or incorrect set of results. The correct columns to use in a query to view family publishing preferences are as follows:

- **Families > Publish Address**

- **Families > Publish Email**

- **Families > Publish Phone**

The following illustration shows you the location of the columns in the **Column Picker** panel:
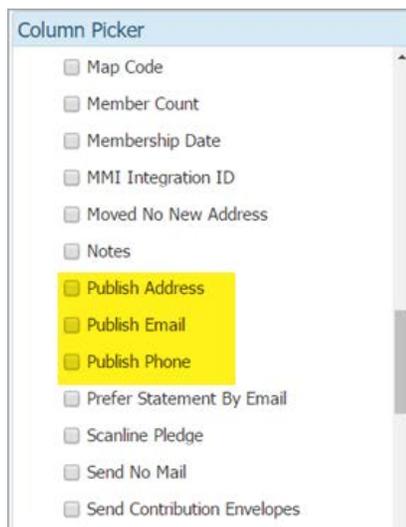
Special Characters in Query Results Now Display Correctly in .csv Export Files

We fixed the issue that caused data containing special characters, such as apostrophes and tildes, to display incorrectly after it was exported to a **.csv** file. The data in the exported file is now readable.

Added Ability to Build Queries to Pull Contribution Data for Individual Family Members

Previously, when the user built queries to pull individual member contributions, the results set was incomplete or contained incorrect data. We found and fixed the cause of this issue so that users can now pull contribution data for individual family members. Such queries must be designed correctly to obtain accurate and meaningful results. Therefore, we added prompts to help users set up these specialized queries correctly.

Applying SUM Aggregate Function to Contributions Amount Data Now Produces Correct Results

Previously applying the **SUM** aggregate function to contribution amount data at the family level produced incorrect giving totals if more than one family member met the query conditions. We resolved this issue.

Queries that contain aggregate functions like SUM to calculate contribution data at both the member and family level must be designed in a specific way to produce valid results. To help users build these specialized queries correctly, we added guidance in the form of a pop-up message.

Query Results Set Now Includes Classes Not Associated with a Session

Previously when the user created a query to retrieve a list of all classes, any classes not associated with a session were excluded from the results set. We resolved this issue. A query designed to retrieve the names of all classes now returns the names of all classes whether they belong to a session or not.

Running Queries Against the Organization > Region Field No Longer Produce an Error

We fixed an issue that caused the system to experience an `Invalid column name` error when the user attempted to query data in the **Region** field (in the **Organization** group).

'Is Equal To' Removed from List of Conditional Operators Available for the Birthdate Field

Queries in which the **Is Equal To** conditional operator was applied to the **Member > Birthdate** field sometimes produced incorrect and inconsistent results. We temporarily removed this operator from the list of conditions. We are working on a solution and will add **Is Equal To** back to the list in a future release.

Contribution Data Now Joined to Batches

Previously, queries designed to join contributions with associated batches returned incorrect results. We resolved this issue. Queries that join contribution and batch data now produce correct results.

Format of Dollar Amounts in the 'Pledge Total Paid' Results Column Fixed

Previously, the dollar amounts shown in the **Pledge Total Paid** results column contained extra zeros following the decimal point. Now, as expected, no more than two digits follow the decimal point.

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Administration

Resolved Issues

Suspense

Address Changes Must Now Be Approved as a Group

To improve the quality of address data, we changed the way address information is approved in Suspense. Previously, administrators could separately approve a family's change to their country, city, state, and postal code information. With this change, the address elements of country, city, state, and postal code are combined, so the administrator must now approve them as a unit.

New, Unregistered Families Now Appear in Match List for Existing Family Records

Previously during the review process for new user registrations, if users selected the **Find Existing Member in Family Directory** option and the family they were searching for was not registered to the organization, the family's name did not appear in the match list. We resolved this issue. Unregistered families now appear in the match list so users can select them and complete the registration process.

Details in Suggested Matching Email Records Corrected

Previously during the review process for new user registrations, if the user selected the option to search for a matching record using the member's email address, details in the suggested matching record were occasionally missing or incorrect. This issue sometimes made it difficult for users to identify the right member record. We fixed these omissions and inaccuracies.

'Auto Fill Family Names' Link Now Working

Previously during the approval process for new user registrations, the Auto Fill Family Names link did not work if the user changed a family's postal code prior to clicking the link. We found and fixed the source of the issue so that the link is now working as expected.

'Given Key not present' Error Resolved

Previously when the administrator tried to approve a new user registration, the system sometimes experienced a `Given Key not present` error. This error prevented the administrator from being able to approve and finalize the registration. We found and fixed the cause of this error.

Approved New User Registrations Now Appear in Suspense History Grid

Previously, the **Suspense History** grid stopped showing the names of families whose registrations for My Own Church were approved. We found and fixed the cause of this issue.

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Search Results for Suspense History Now Include All Records

Previously, if a Suspense History search presented results on multiple pages, records were sometimes missing on the second and following pages. We resolved this issue.

Email Approval Options Now Depend on Each Other

Previously, administrators could separately enable or disable the **Match CURRENT Email** and **Match PRIOR Email** approval options. These two options now depend on each other and can no longer be separately selected. Specifically, the system activates the **Match PRIOR Email** option only if the user enables the **Match CURRENT Email** option.

'Send No Mail' Field Relabeled to Improve Clarity

Admin users reported being confused by how a family's changes made to the **Send Mail** option in **Family Details** were reported in **Suspense > Family Directory Updates**.

We determined that inconsistent and negative labeling of the Send Mail feature was causing the confusion. In **Family Details**, the checkbox is labeled **Send Mail**. However, in **Suspense > Family Directory Updates**, the field in which Send Mail information is reported was labeled **Send No Mail**. To improve clarity, we changed the field label in **Suspense > Family Directory Updates** to **Send Mail** to match the checkbox in **Family Details**. A **Yes** or **No** value in the field now respectively corresponds to the meaning of the state of the **Send Mail** checkbox in **Family Details**; that is, selected = **Yes** and deselected = **No**.

Lookups

Edits to the Description Field in a Member Strength Record Now Saved

Previously, when the user attempted to save an edit to the text in the **Description** field in a **Member Strength** record, the system did not save the change. We resolved this issue.

System Setup

Columns No Longer Extend Beyond the Boundary of the Organization Licensing Grid

Previously in the **Organization Licensing** grid, the user could resize the right-most column and push the contents of the column past the grid's right boundary. We changed the properties of the grid to constrain the width of the right column so that it can no longer extend beyond the boundary of the grid.

Manage Staff

Sort Function Now Works on Date of Birth Column

We resolved an issue that prevented the sort function (both ascending and descending) from working when applied to the **Date of Birth** column.

Process Used to Edit Social Security Numbers Modified

We modified the process used to edit a social security number that is entered incorrectly into a staff member's record.

Previously, only the last four digits of the member's social security number were visible in the **Soc Sec #** field, and the system allowed the admin user to edit any one of the individual digits to correct the entire number. For security purposes, the last four digits of the social security number are no longer revealed, and the entire field is blank. To edit a social security number, the user must now enter all nine digits into the **Soc Sec #** field.

Select All and Clear All Links in Staff Record Now Working Correctly

Previously when the user clicked the Select All or Clear All Link to respectively select or remove access rights in a staff member's record, the window suddenly closed and the user's access rights selections were not saved. We resolved this issue.

'Get Family Info' Link on Addresses Tab in Staff Record Now Working as Expected

Previously when the admin user clicked the Get Family Info link, the system populated the address fields (as expected) with the retrieved family address, but also immediately saved that address to the database when it should not have. Additionally, if the user wanted to remove the address, clicking the **Cancel** button did not work. We resolved this issue. The system now saves the retrieved address only after the user saves the change. The system undoes the change if the user cancels the process or closes the staff record.

Organization Admin Checkbox Control Now Working for Offering Module's Settings

We resolved an issue that prevented the **Organization Admin** checkbox control in the staff record from working correctly to select (or deselect) all access rights settings for the **Offering** module. The checkbox control is now working as expected.

Diocesan Suite

Census

Resolved Issues

Diocesan Member Workgroups No Longer Missing Members

Previously at the diocesan level, when the user created a member workgroup, members added to the workgroup who did not have a record at the diocese were excluded from the **Members in Workgroup** list. We resolved this issue. The **Members in Workgroup** list includes all added members—even those who have no record in the diocesan organization.

'All Organizations' View of Family List No Longer Prevents Edits to Diocesan Workgroups

We resolved an issue that prevented diocesan administrators from being able to edit diocesan workgroups when the **All Organizations** setting was selected from the Organization list on the **Family List** page.

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Diocesan Development

Resolved Issues

Parish Reports

Truncated Column Names Fixed in the .csv Version of the Parish Refund Shortfall Report

Previously, in the **.csv** version of the exported Parish Refund Shortfall report, these columns were shifted up and to the left and their names truncated: **Refund Anticipated** and **Shortfall Anticipated**. We fixed this formatting issue.

Organization Selection Menu in the Designation Details Report Setup Corrected

Previously, the Organization list in the setup for the **Designations Details** report did not contain the expected number of organizations. Note that the issue did not affect the content of the report. We resolved this issue. The list now shows the correct number of organizations.

Data for Same-Name Organizations Now Separated in Designation Details Report

Previously, the system filtered data in the **Designation Details** report based on the name of the organization. As a result, organizations with the same name had their pledge data combined and reported under one parish. We resolved this issue. The system now differentiates organizations based on the unique Organization ID, which keeps their data separate in the report.

Donor Reports

Added Ability to Generate a Canadian Tax Receipt or Contribution Detail Statement for One Family Only

Previously, the system generated a `System Error` if the user tried to enter the same **Family DUID** in the **from_to** fields. This error prevented the user from being able to generate a Canadian tax receipt or Contribution Detail Statement for just one family. We resolved this issue.

You can now enter the same Family DUID in both fields to generate a tax receipt or contribution statement for one family only.
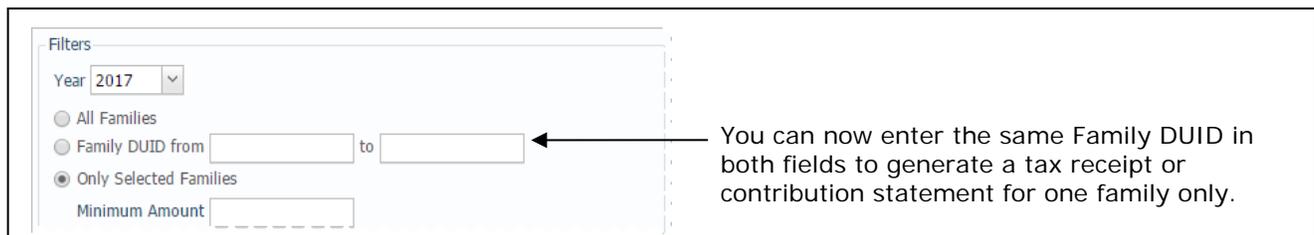
Administration

Access to Administration Area Restricted to Diocesan Administrators Only

We added controls to restrict access to the **Administration** area in Diocesan Development to users with diocesan administrator permissions only. Users with organization administration permissions and permission to ConnectNow DDM can no longer see the **Administration** tab. Those users, however, will continue to have access to the standalone **Administration** module as it pertains to their organization.

Administration

Resolved Issues

Suspense

'Given Key not present' Error Resolved

Previously when the administrator tried to approve a new user registration, the system sometimes experienced a `Given Key not present` error. This error prevented the administrator from being able to approve and finalize the registration. We found and fixed the cause of this error.

'Send No Mail' Field Relabeled to Improve Clarity

Admin users reported being confused by how a family's changes made to the **Send Mail** option in **Family Details** were reported in **Suspense > Family Directory Updates**.

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Ability to Merge Lookup Records for Diocesan Family Groups Restored

We resolved an issue that prevented the Merge Records function from working as expected when the diocesan administrator attempted to merge lookup records for family groups that were created by the top-level diocesan organization. The selected lookup records appeared to be merged, but when the process completed the records were not combined as expected.

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Manage Staff

System No Longer Duplicates Fund Permissions

Previously, if **Diocesan Amin** access rights were removed and then reassigned to an administrator's record, the system duplicated permissions to the organization's funds when it should simply have replaced them. We removed all duplicate permissions created by this error to correctly establish one permission per fund. We also modified the system's behavior to prevent duplicate fund permissions whenever the user removes and then reassigns an administrator's **Diocesan Admin** access rights.

'Get Family Info' Link on Addresses Tab in Staff Record Now Working as Expected

Previously, after an admin user clicked the Get Family Info link, the system populated the address fields (as expected) with the retrieved family's address, but also saved that address to the database when it should not have. Additionally, if the user tried to remove the address, clicking the **Cancel** button did not work. We resolved these issues. The system now saves the retrieved address only after the user saves the change. The system undoes a change if the user cancels the process or closes the staff record.

Notifications

Notifications Logic Redefined for Reporting Changes in Registration Status

Previously, if a family registered to one parish was added as unregistered to another parish, the system sent a notification to the parish of registration to inform it that the family's registration status had changed when it had not. The notification appeared in the **Notifications** grid. We redefined the notifications logic to prevent the system from creating a change of registration notification when a family is added as unregistered to another parish.

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Subsequent Updates to the 4.4.0 Release

We strive to ensure a problem-free release. Nevertheless, after an official product release, issues occasionally arise that we immediately address in subsequent updates to the software. The following tables list issues that were encountered in the v4.4.0 release that were quickly resolved. Each entry in the tables contains a link to the release note item, presented earlier in this document.

Table 1. Issues Resolved in the v4.4.0.70 Update

Module	Issue Description	Update
Offering	Blank option missing from the **Pledge** dropdown list in the Edit Contribution modal and in the Detailed Posting modal. Because the blank option was missing, users were prevented from disassociating a contribution from a pledge.	In the Edit Contribution and Detailed Posting modals, the blank option was added back to the **Pledge** dropdown list where it appears as the first selection.
	Giving History grid missing records after Page 1 **Giving History** grid shows the first page of contribution records only. When the user clicks a page button, subsequent pages incorrectly display this error message: `No families found`.	All pages in the **Giving History** grid now load as expected. The user experiences no error message.

Table 2. Issues Resolved in the v4.4.0.71 Update

Module	Issue Description	Update
Religious Education	Users experience an error when trying to send web-based emails Users experience the following error when attempting to send web-based emails from the **Classes** page: `Invalid Character Combination Entered`	The web-based email feature available on the **Classes** page is now working correctly. No error message is displayed.
Offering	Batch descriptions cannot contain an underscore character When users add batch descriptions that contain the underscore character (_), the system displays a warning that the underscore is not a valid character.	Underscores in batch names are now accepted.

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Table 3. Issues Resolved in the v4.4.0.78 Update

Module	Issue Description	Update
My Own Church	MOC users are unable to add new members to their records (Add button missing)	The **Add** button is now configured to display in **Member Details**.
Family Directory	Mail Merge output contains multiple sacrament certificates for certain members	The number of merged sacrament records now matches the number of selected members. The output contains only one certificate per selected member.
	Organization dropdown list on the Family Workgroups and Member Workgroups pages is empty for some organizations This issue prevents users in some organizations from being able to select an organization and then view the names of families and members assigned to its workgroups. Additionally, a search for new families or members to add to workgroups produces no results.	The Organization dropdown list is now populated with the names of organizations the logged-in user has permission to access. The user can select an organization to view the names of families and members belonging to its workgroups. Additionally, the search feature is working to allow the user to find new families and members to add to workgroups.
	CSV export file is not preserving the sort order setting applied to Family List grid This issue is problematic especially when users sort the grid on the **Envelope #** column and then use Mail Merge to print mailing labels. The envelope number sort order is not maintained in the export.	When data in the **Family List** grid is sorted and exported to a CSV file, the sort order is now preserved in the export file.
	Parish Directory report contains names of deleted family members Names of deleted family members appear in the Parish Directory report when they should not. This error is causing inaccuracies in the report.	Names of deleted family members no longer appear in the Parish Directory report.
	Marriage sacrament report is missing information in the Location of Baptism field Names of custom organizations are not showing in the **Location of Baptism** field, which is causing some marriage sacrament records to be incomplete.	The names of custom organizations now display in the **Baptism Location** field in the marriage sacrament report.

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Contacting ParishSOFT

If you have questions or require support while using the application, use any of the following methods to contact us:

P	http://www.parishsoft.com/getsupport
✉	support@parishsoft.com
☎	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)

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