ParishSOFT
A Part of the Ministry Brands® Family

VERSION 4.4.7 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.7 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

Contents

ParishSOFT Version 4.4.7 Release Notes Internal Use Only_last updated December 13, 2018

System-Wide

Important Information About Your Web Browser

Updating your browser is important. Keeping your web browser up to date not only enables you to take advantage of the latest performance enhancements made to ParishSOFT Family Suite but also protects your computer from exposure to security threats that can put your data at risk.

Please take a moment to verify that you are using the latest browser version. And, keep your browser updated regularly for the best experience and for your own safety and security.

Performance Enhancements

We constantly monitor system performance and look for ways to improve it. In this release, adjustments were made to optimize performance of the current environment. Additionally, specific changes were implemented to speed up the processing of end-of-year contribution statements.

ParishSOFT Version 4.4.7 Release Notes Internal Use Only_last updated December 13, 2018

ParishSOFT Family Suite

My Own Church

Resolved Issues

My Family

Enrollment Information for Religious Education Now Displayed in Member Details

Previously for some users, the **Religious Education** tab in **Member Details** was missing class enrollment information. We fixed this issue. Past, current, and future enrollment information for Religious Education classes is now displayed on the **Religious Education** tab in **Member Details**.

Family Directory

Resolved Issues

Mail Merge

Merged Sacrament Certificates Now Show Correct Organization Name

We resolved an issue that sometimes caused the wrong organization's name to appear on merged sacrament certificates.

Member Details

Marriage Sacrament Record Now Shows Current Marriage Information

For members who have been married more than once, the marriage sacrament record now shows information for the current marriage.

Family Workgroups

Family Workgroups Mailing List Quick Report Now Shows Correct Envelope Numbers

Previously, the Family Workgroups Mailing List report showed envelope numbers assigned to families by the parish of registration when it should have shown the envelope number assigned by the organization running the report. We corrected this issue. The report now shows envelope numbers assigned by the organization running the report even for families registered at a different organization.

Reports

Parish Statistics

Intermittent `Oops` Error Resolved

Previously, some users reported experiencing an `Oops` error when trying to run a Parish Statistics report. The report now runs successfully.

Offering

## Updates and Enhancements

Reports

Batch Detail

Contributions in Batch Detail Report Now Listed in Order Entry

Previously, contribution entries were randomly listed in the Batch Detail report, which sometimes made it challenging for users to validate contributions in a batch. With this update, contributions are now listed in entry order.

Contributions Statements

New Amount Filter Added to Contributions Statement Setup (Summary and Paper Versions Only)

As shown below, the Summary Contributions Statement report (paper version only) features a new **Amount** filter that enables you to list individual contributions of $250.00 or more.
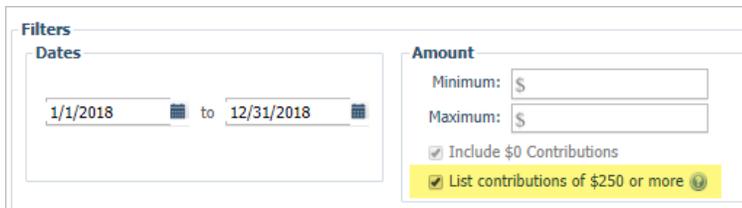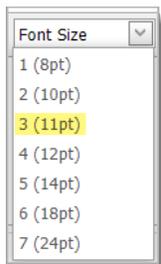

The new filter applies to both family and member contributions. You can use it in combination with other filters in the report setup (for example, funds and dates) to fine-tune results. The filter is useful for IRS purposes in that it provides the necessary details about contributions over $250.

Font 11 Now Available for Body of Statement and Printed Name Under Signature

You can now select font size 11 for the body of statement text and the printed name under the signature. If desired, you can also change the default text in existing templates to font size 11. To do this:

1. Select an existing template from the **Body of Statement** and/or **Printed Name** dropdown list.

2. Select the template's text. Then, in the **Font Size** dropdown list, select **3 (11 pt)**:

3. Finally, click 💾 to save the change.

ParishSOFT Version 4.4.7 Release Notes Internal Use Only_last updated December 13, 2018

Header Added to Summary Version of Multi-Page Contribution Statements (Paper Version Only)

To help staff keep track of pages when printing and sorting contribution statements, we added a header that appears at the top of the second and all subsequent pages of the paper version of the Summary Contributions Statement report. The header contains the following information:

- Name of organization
- Statement date
- Family name
- Family envelope number

Address Line 1 and Line 2 Now Printed on Separate Lines (Paper Version Only)

Previously on contribution statements, Line1 and Line 2 (if present) of the donor's address were printed on the same line. If Line 2 is present, it is now printed on a separate line. For example:

Mr. Clifford Edwards
207 Stuyvesant Rd.
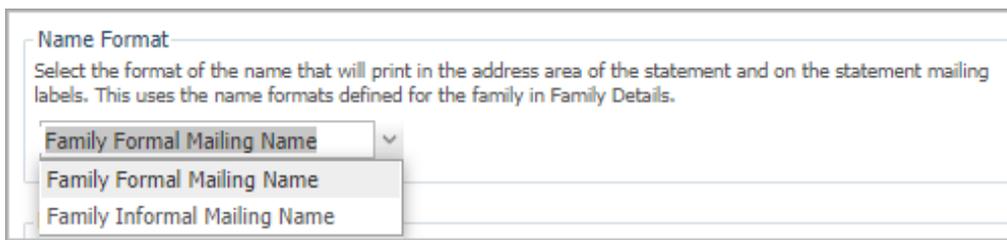Apt. 1222
Livonia, MI 48150

This update applies to paper versions only of the Detail and Summary Contributions Statement reports.

Added Ability to Select Preferred Format for Recipient's Name on Contributions Statements

In the Contributions Statement setup when **Family** is selected as the **Contribution Source**, users can now select the preferred format of the recipient's name where it appears in these areas of the paper and electronic statement:

- Inside address block
- Mailing labels
- Salutation (greeting) used in the custom message, if created.

The **Name Format** dropdown list on the **Template** tab provides options that enable users to select a format for the recipient's name in the address block and on mailing labels. Two options are available:

- **Family Formal Mailing Name** (the default): pulls the recipient's name from the same-named field in the family record. Uses this format: **Title**, **First Name**, **Last Name**. For example, Mr. and Mrs. David Smith.

- **Family Informal Name**: pulls the recipient's name from the same-named field in the family record. Uses this format: **First Name**, **Last Name**. For example, David and Anna Smith.

The **Salutation Format** dropdown list on the **Template** tab provides options that enable users to select a format for the name appearing in the greeting used in the custom message, if created. Four options are available:

Note

*The **Salutation Format** dropdown list is visible only after you select a new or existing **Body of Statement**.*
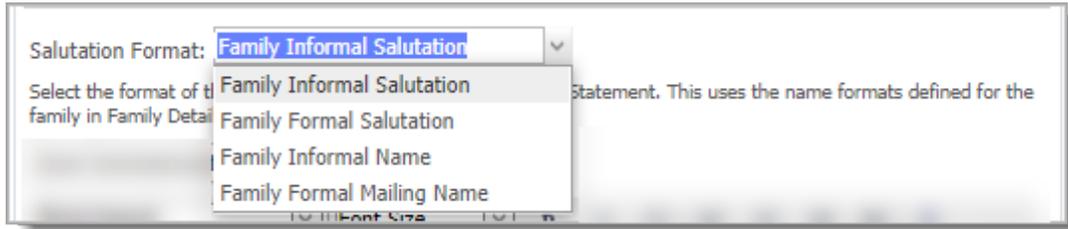
- **Family Informal Salutation**: pulls the recipient's name from the same-named field in the family record. Uses this format: First Name. For example, David and Anna.

- **Family Formal Salutation**: pulls the recipient's name from the same-named field in the family record. Uses this format: Title, Last Name. For example, Mr. and Mrs. Smith.

- **Family Informal Name**: pulls the recipient's name from the same-named field in the family record. Uses this format: First Name, Last Name. For example, David and Anna Smith.

- **Family Formal Mailing Name** (the default): pulls the recipient's name from the same-named field in the family record. Uses this format: Title, First Name, Last Name. For example, Mr. and Mrs. David Smith.

"Sticky" Feature Added to Fields on the Template Tab

Each field on the **Template** tab—except for the **Statement Date**—now "remembers" the previously entered value. We refer to this feature as "sticky" because values remain the same even after you leave and then return to the **Template** tab. The advantage of "sticky fields" is that they eliminate the need for you to enter the same information again. They can significantly speed up your workflow when you are generating sets of contribution statements for the same year.

Address Line 3 of the Organization's Address Now Printed in Font Size 11

Previously, the address line 3 of the organization's address was printed in 10-point font while lines 1 and 2 were printed in 11-point font. To achieve consistency, all lines are now printed in 11-point font.

Detailed and Summary Versions of Contributions Statement Reports Now Generate Faster

In this release, we took steps to improve the time it takes the system to generate and display the Contributions Statement report (both the Detailed and Summary versions). A long report now takes only a few minutes to complete. Be aware that while a report is being generated, you can perform other tasks in the application, as desired. When a report is ready, it is displayed on a separate browser tab where you can view the statements included in the report, save, and print them.

! **IMPORTANT**

To take full advantage of performance enhancements made to speed up report processing of reports, make sure your web browser is up to date.

List Order of Contributions Revised

Previously, individual contributions in the Contribution Detail report were arranged vertically (from top to bottom) in an ordered list within two columns. After reaching the bottom of the first column, the list continued at the top of the second column. As a result of performance improvements made to this report, the report builder could not maintain this list order. Instead, contributions are now arranged horizontally (from left to right) in an alternating sequence between two columns. The following illustration uses numerical callouts to clarify the new list order.

Note

*In the illustration below, the selected **Sorting** option is **Date Descending**.*

Ms. Jennifer Herman
7136 Elli Harbour Lane
Livonia, MI 48150

Family Contributions - Detail   **Total Contributions: $3,911.00**
Period 01/01/2016 - 12/31/2018   Period 01/01/2016 - 12/31/2018

	Date	Check #	Amount	Fund		Date	Check #	Amount	Fund
(1)	12/30/18		$65.00	Offertory	(2)	12/23/18		$60.00	Offertory
(3)	12/16/18		$55.00	Offertory	(4)	12/09/18		$50.00	Offertory
(5)	12/02/18		$45.00	Offertory	(6)	11/25/18		$40.00	Offertory
	11/18/18		$35.00	Offertory		11/11/18		$30.00	Offertory
	11/04/18		$25.00	Offertory		10/28/18		$20.00	Offertory
	10/21/18		$15.00	Offertory		10/14/18		$10.00	Offertory
	10/07/18		$5.00	Offertory		09/30/18		$150.00	Offertory
	09/23/18		$145.00	Offertory		09/16/18		$140.00	Offertory
	09/09/18		$135.00	Offertory		09/02/18		$130.00	Offertory
	08/26/18		$125.00	Offertory		08/19/18		$120.00	Offertory
	08/12/18		$115.00	Offertory		08/05/18		$110.00	Offertory
	07/29/18		$100.00	Offertory		07/22/18		$95.00	Offertory
	07/15/18		$90.00	Offertory		07/08/18		$85.00	Offertory
	07/01/18		$80.00	Offertory		06/24/18		$75.00	Offertory

Tax Receipts

Canadian Tax Receipts Updated with Canadian Revenue Agency's New Website Address

We updated Canadian tax receipts to show the Canadian Revenue Agency's (CRA) new website address: www.canada.ca/charities-giving.

Resolved Issues

Statements

Inconsistency in Results Behavior of Amount Filters Resolved

Previously the **Amount** filters applied different criteria to member and family contribution data, which yielded inconsistent results. When the contribution source was set to Family, the filters looked at total contribution amounts. However, when the contribution source was set to Member, the filters looked at individual contribution amounts. We fixed this issue. The Amount filters are now configured to look at total contribution amounts when applied to family and member contribution data. Using the same criteria ensures that calculated amounts for family and member contribution data are accurate and consistent.

System No Longer Switches Printed Signature Font from Arial to Times New Roman

Previously, if the user selected Arial as the font for the printed signature on statements, the system defaulted to Times New Roman. We fixed this issue. If the user specifies Arial for the printed signature font, the system no longer changes to Times New Roman.

'Include $0 Contributions' and Amount Filters No Longer Conflict

We resolved an issue that caused a conflict between the **Include $0 Contributions** filter and the **Amount** filters. Previously when the filters were used together, the minimum and maximum amount specified by the user was ignored, which caused givers with $0 contributions outside the amount range to be incorrectly included in the **Givers List**. To prevent this problem, we configured the filters to apply in this sequence:

4. The **Amount** filters are applied to the Givers List to create a list that includes only those givers who fall within the user-specified minimum-maximum amount range.

5. If the **Include $0 Contributions** filter is also selected, it is applied to the list restricted by the **Amount** filters. If any givers in the list have $0 contributions, the $0 contributions are printed along with their other contributions.

'Show non-givers' Filter Now Working As Expected

The **Show non-givers** filter is designed to find non-givers, which are individuals or families whose contributions to selected funds during the user-specified date range equal zero dollars ($0.00). Previously, the filter did not work as expected, specifically:

- In some instances, the filter returned a list of non-givers only if the user also selected the **Include $0 Contributions** filter.

- In other instances, when used alone the filter inaccurately returned a list that included deleted givers.

We resolved both issues. The filter no longer returns deleted families with no giving and works correctly when applied on its own.

Error Resolved: `No Information Received for Report Rendering`

Previously when attempting to generate contribution statements, users sometimes experienced this error:

    No Information Received for Report Rendering

We resolved this issue.

Missing Header Fixed

We fixed an issue that prevented the header on the second and subsequent pages of the Detail contribution statement from displaying if the body of statement on Page 1 was long enough to cause a page break.

Signature Image Conflict Resolved

We resolved an issue that sometimes prevented the system from being able to generate Contributions Statement reports containing an uploaded signature image.

Signature Image Now Displayed in Custom Messages

Previously, an uploaded image of the sender's signature did not display in the letter accompanying contributions statements. We resolved this issue.

Tax Receipts

Contribution Amounts No Longer Missing from the Total Given Column

Previously in the Tax Receipts setup, contribution amounts were missing from the **Total Given** column in the **Givers** grid. We fixed this issue.

Diocesan Development

Updates and Enhancements

Donor Reports

Error Message Text Revised to Improve Clarity

Previously in the Contributions Detail Statement setup if the user selected the **Only Selected Families** option and then during the family search process entered a non-integer value in **Family DUID** field, the system issued an unclear error message. We revised the message to make users aware of exactly what the problem is so they can quickly fix it.

Canadian Tax Receipts Now Show Canadian Revenue Agency's New Website Address

We updated Canadian tax receipts to show the Canadian Revenue Agency's (CRA) new website address: www.canada.ca/charities-giving.

Contributions Detail Statement Report Generates Faster

In this release, we took steps to improve the time it takes the system to generate the detail version of the Contributions Statement report. A long report now takes only a few minutes to process. Be aware that while a report is being generated, you can perform other tasks in the application, as desired. When a report is ready, it is displayed on a separate browser tab where you can view the statements in the report, save, and print them.

IMPORTANT

To take full advantage of performance enhancements made to speed up report generation, make sure you are using the latest version of your web browser.
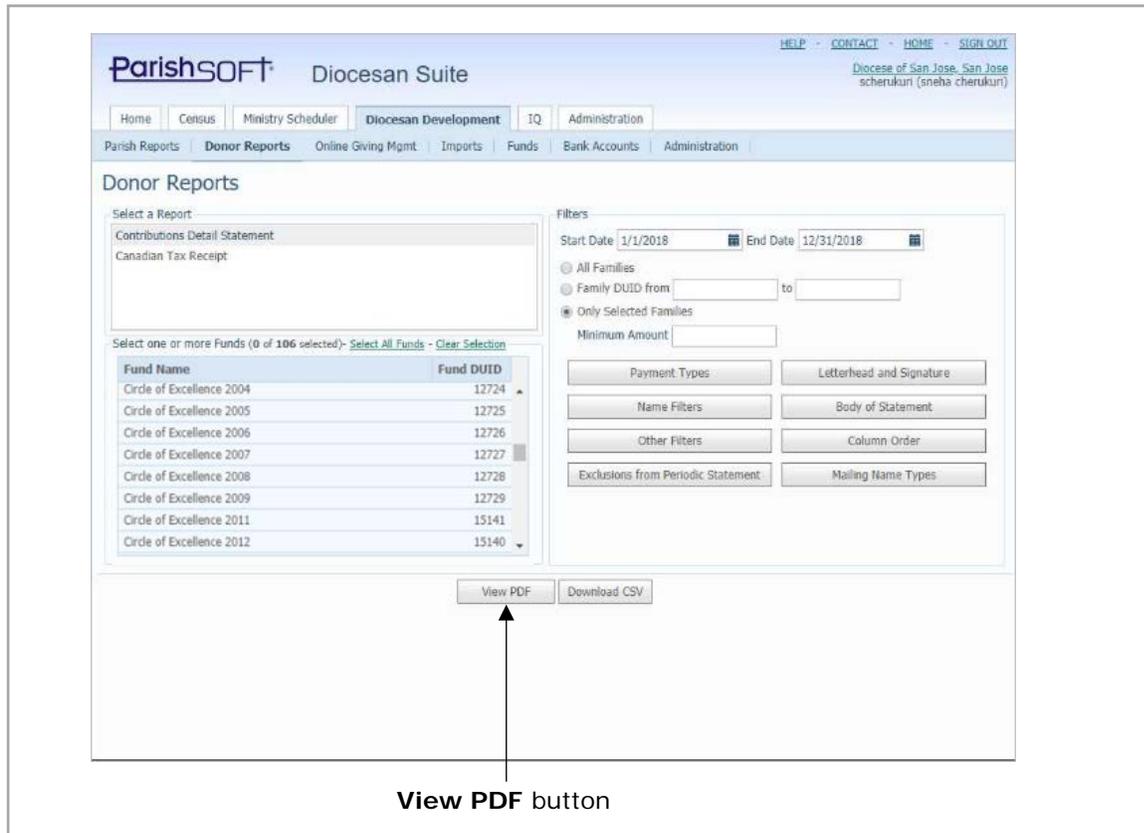
Report Preview Feature Added to Contributions Detail Statement Report

The setup for the Contributions Detail Statement report now provides a preview feature that enables you to view statements before printing them directly or downloading them to a file. Clicking the **View PDF** button (shown in the illustration below) presents a preview of the generated report, which is displayed on a separate browser tab.

Notes

The View PDF button replaces the Download PDF button.

The system can generate only one report at a time. While a report is generating, the View PDF button is temporarily disabled (dimmed). After the system finishes generating a report, the button is enabled to allow you to generate another report.

View PDF button

Resolved Issues

Parish Reports

Total Paid Amounts Shown in Detail Section of the Parish Master Report Corrected

Previously, the total payment amount reported in the summary sections of the Parish Master report sometimes differed from that shown in the List of Givers section. We fixed the issue. The total payment amounts shown in both sections of the report now match as expected.

Administration

Resolved Issues

Manage Staff

System Now Redirects User to Login Page After a Session Times Out

Previously, when a user's session timed out due to inactivity on the **Add Staff** page, the system displayed page permission error message instead of redirecting the user to the **Login** page. We fixed this issue. The system informs the user that the browser session expired and displays the **Login** page.

ParishSOFT Version 4.4.7 Release Notes Internal Use Only_last updated December 13, 2018

ParishSOFT Diocesan Suite

Diocesan Development

Donor Reports

Contributions Detail Statement

Occasional System Error Resolved

We resolved a system error that the user sometimes experienced when running the Summary per Family or Detail per Contribution export of the Contributions Detail Statement report.

Administration

Updates and Enhancements

Merge Families

Merge Family Records

DIO-1371 Error Resolved: 'Cannot insert the value NULL into column'

Previously when some users attempted to merge family records, they experienced this error:

```
Cannot insert the value NULL into column 'RowData', table
```

We determined the cause of the error and resolved it.

Reports

Report Preview Feature Added to Contributions Detail Statement Report

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View PDF button

Contacting ParishSOFT

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

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