VERSION 4.4.9 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.9 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

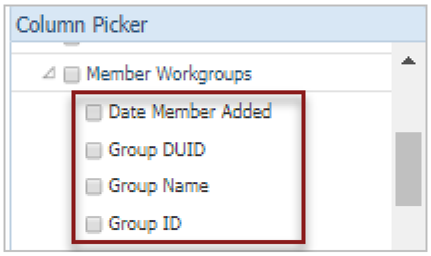
Contents

IQ

Updates and Enhancements

Member Workgroups Section Added to Column Picker

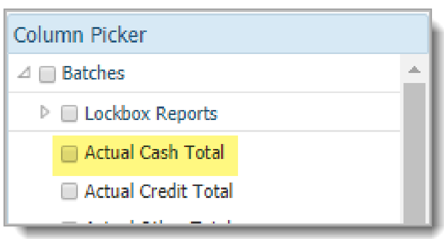
To the **Members** group in the **Column Picker** panel, we added a new section named **Member Workgroups**. As shown in the following illustration, expanding the section displays the new columns you can add to a query:



The columns can be applied singly or in combination as query conditions. Additionally, query results can be exported and included in mail merges.

Actual Cash Total Column Now Available to All IQ Users

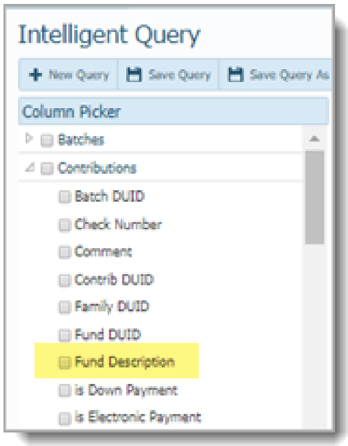
Previously in the **Batches** section of the **Column Picker**, the **Actual Cash Total** column was visible only to users with the **Diocesan Admin** permission enabled. We removed the **Diocesan Admin** restriction so that all users can add the column to a query.



The **Actual Cash Total** column can be applied as a condition to your queries. Additionally, query results can be exported and included in mail merges.

Contributions Group Now Includes Fund Description Column

Per customer request, we added the **Fund Description** to the **Contributions** group in the **Column Picker** panel:



The **Fund Description** column can be applied as a query condition. Additionally, query results can be exported and included in mail merges.

Resolved Issues

Member Status Queries Now Show Results Consistent with Member Details

Previously, results obtained from queries that retrieved data from the **Members > Member Status** column sometimes did not match values in the **Member Status** dropdown list in **Member Details**. We resolved this issue. Results obtained by such queries now match information displayed in the **Member Status** dropdown list.

Master Record Updated with Queries in Duplicate Record After a Merge

Previously during a merge, the system did not update the **My Queries** list in the master record with queries created by the owner of the duplicate record. We fixed this issue. After a merge, any queries created by the duplicate record owner now appear in the master record's **My Queries** list. The query owner is identified, and the queries can be opened, modified, and deleted, if necessary.

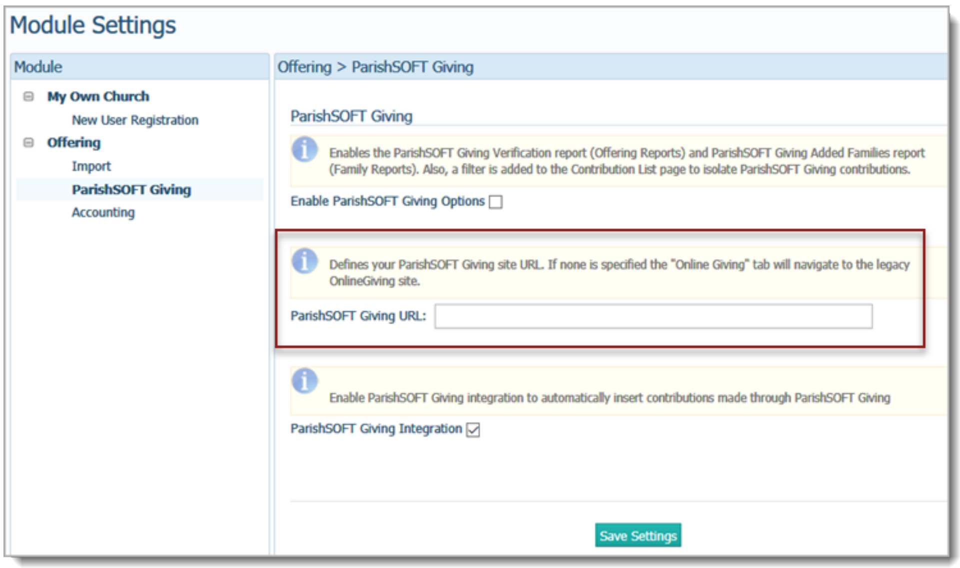
Administration

Updates and Enhancements

Module Settings

ParishSOFT Giving URL Field Added to Enable Direct Access to ParishSOFT Giving Website

As shown in the following illustration, we added a **ParishSOFT Giving URL** field to the **Offering > ParishSOFT Giving** group on the **Module Settings** page:



The **ParishSOFT Giving URL** field enables administrators in organizations that use ParishSOFT Giving to specify ParishSOFT Giving's website address. After the address is saved, users in those organizations have direct access to ParishSOFT Giving from within the Offering and My Own modules in ParishSOFT Family Suite.

By default, the **ParishSOFT Giving URL** field is blank. Do one of the following:

- Leave the field blank (not recommended).

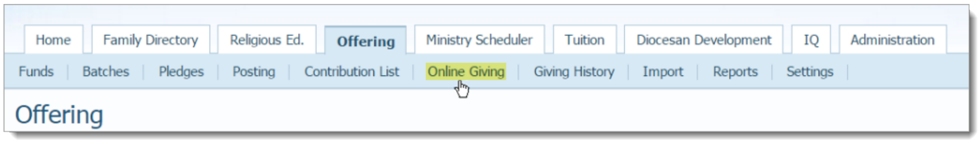
IMPORTANT

If you leave the ParishSOFT Giving URL field blank, users in organizations that use ParishSOFT Giving will not have direct access to ParishSOFT Giving from the Offering and My Own Church modules in ParishSOFT Family Suite.

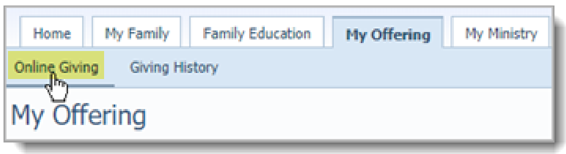
- Enter the address of your ParishSOFT Giving website in the field. Then, save the change.

  After you save the change, users in organizations that use ParishSOFT Giving have direct access to your website. Specifically:

  - ❖ When Admin users click the **Online Giving** tab (shown below) in the Offering module, they will be taken directly to the ParishSOFT Giving Admin Login page (giving.parishsoft.com/cp).



  - ❖ When church users click the **Online Giving** subtab (shown below) in the My Own Church module, they will be taken directly to the ParishSOFT Giving donor Login page.



IMPORTANT

At any time, you can restore the default ("blank") behavior of the ParishSOFT Giving URL field by removing the website address from the ParishSOFT Giving URL field. After you save the change, the system does the following:

- **If your organization previously used Online Giving, the Online Giving tabs in Offering and My Own Church, when clicked, take users to the Online Giving Login page.**

- **If your organization never used Online Giving, the system removes the Online Giving tabs from Offering and My Own Church, thereby preventing users from having direct access to ParishSOFT Giving from within ParishSOFT Family Suite.**

Resolved Issues

Suspense

Duplicate New User Registrations Removed from User Registrations Grid

Previously, new user registration requests pending administrator approval appeared as duplicates in the **User Registrations** grid. We fixed this issue to prevent duplicates from appearing again in the future.

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Resolved Issues

Life Events Comments for Members Now Displayed in Human-Readable Text

Previously, queries that retrieved data from the **Member > Life Events > Event Comments** column displayed results in code instead of human-readable text. We fixed this issue. In the query results set, life event comments for members are now shown in natural, human-readable language.

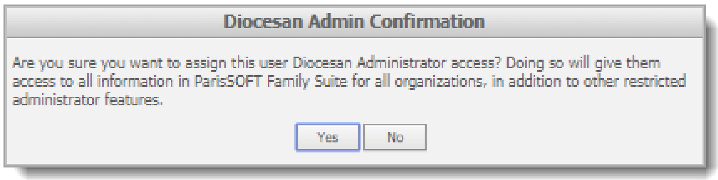
Administration

Updates and Enhancements

Manage Staff

Administrator's Request to Assign Diocesan Admin Permission Now Generates Alert

Before saving the **Diocesan Admin** permission for a staff user, the system now displays this final alert to administrators to inform them about the potential impact of granting **Diocesan Admin** permission to a user:



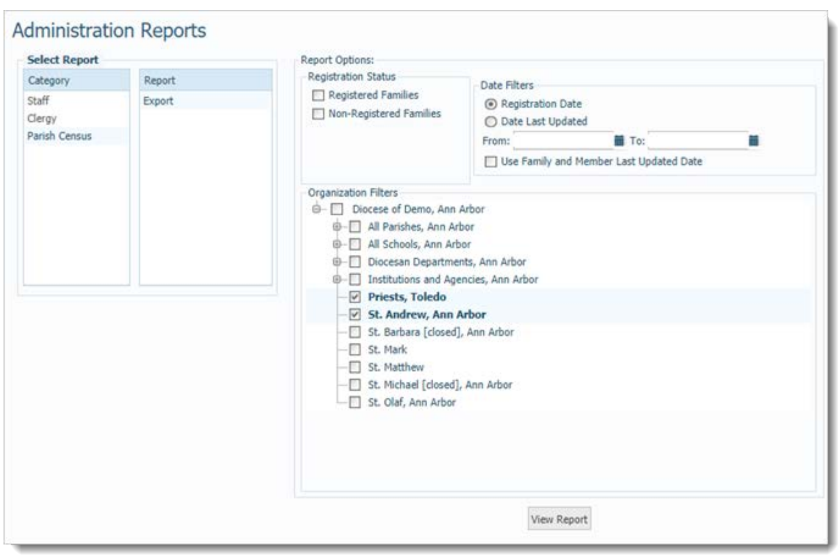
The administrator must respond to the prompt by selecting one of the following:

- **Yes**: dismisses the message and leaves the **Diocesan Admin** permission selected. To grant the permission, click one of the **Save** buttons.
- **No**: dismisses the message and deselects the **Diocesan Admin** permission.

Reports

Parish Census Export Added

As shown in the following illustration, we added a new report named **Parish Census Export**. This report, which was previously available in the desktop suite only, enables a user with **Diocesan Admin** permission to export census data from selected organizations.



Using the report setup (see the previous illustration), a Diocesan Admin user can generate a CSV file of census records based on the following criteria:

- Family's registration status:

  In the Registration Status group, select one or more options to filter the report by registration status: **Registered**, **Non-Registered**, or both.

- Registration date or date range

  In the **Date Filters** group, select the **Registration Date** option. Then, specify a date or a date range in the **From _ To** fields to filter the report by registration date.

  If you want to retrieve records of families that registered on a specific date, enter the same date in the **From _ To** fields.

- Date modifications were last made to the family record

  In the **Date Filters** group, select the **Date Last Updated** option. Then, specify a date or date range in the **From _To** fields to filter the report by the date the family record was last modified.

  If you want to retrieve family records that were last modified on a specific date, enter the same date in the **From _ To** fields.

  Note

  *The Parish Census Export report pulls the modification date from the **Details Modified On** field on the **Family Information** tab in Family Details.*

- Date modifications were last made to the family and member record

  Note

  *To determine when modifications were last made to the family and member record, the system evaluates two dates and chooses the more recent of the two: the date in the **Details Modified On** field in Family Details and the date changes were last made to the Head, Husband, or Wife member record.*

  Select the **Use Family and Member Last Updated Date** checkbox. Then, specify a date or date range in the **From _ To** fields to filter the report by the date modifications were last made to the family and member record.

  If you want to retrieve records that were last modified on a specific date, enter the same date in the **From _ To** fields.

- Organizational affiliation

  In the **Organization Filters** group, select one or more organizations from which to retrieve records.

Resolved Issues

Suspense

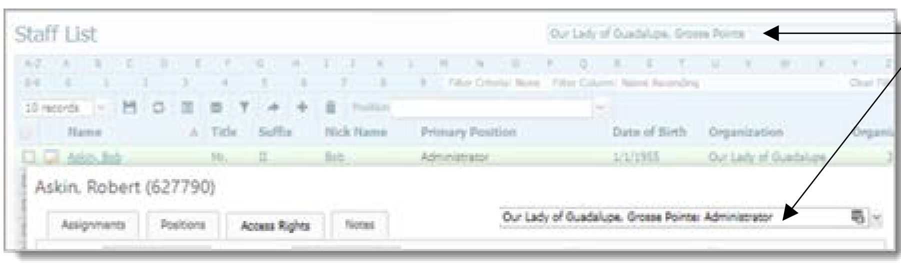
Duplicate New User Registrations Removed from User Registrations Grid

Previously, new user registration requests pending administrator approval appeared as duplicates in the **User Registrations** grid. We fixed this issue to prevent duplicates from appearing again in the future.

Manage Staff

Organization Selected on the Staff List Page Retained After User Opens Staff Details

Previously, the organization selected from the Organization dropdown list on the **Staff List** page was not retained after the user opened staff details. The system reset the organization to the one associated with the staff member's first assignment. We fixed this issue. As shown below when the user opens staff details, the organization previously selected on the **Staff List** page is shown by default.



The user's organization selection on the **Staff List** page now shows in the organization dropdown list in staff details.

Tighter Controls Imposed on ParishSOFT DDM Access Permission

Previously, parish staff with the ParishSOFT DDM permission enabled could view DDM reports (through the Organization list in the report setup) for all organizations in which they held active assignments. We tightened controls on this permission setting to prevent unauthorized users from accessing DDM reports. Now, a staff user must have ParishSOFT DDM access rights specifically assigned to an organization to be able to view its DDM reports.

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)