



VERSION 4.5.0 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.5.0 of ParishSOFT Family Suite, ParishSOFT Diocesan Suite, and Online Giving.

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ParishSOFT Family Suite

What's New

Home

Users Can Now Change the Display Order of Name Tabs in Member Details

By default in **Member Details**, the name tabs of members—except those assigned the role of **Head**, **Husband**, or **Wife**—are displayed in alphabetic order. We added a feature that lets users change the display order so that the tabs are arranged in descending order (from oldest to youngest based on date of birth) by age.

To put the name tabs in order by age, complete the following:

1. Open the **Home** module. Then, select the **User Settings** tab.
2. In the left panel, select the **Member Tab Display** option.
3. In the right panel, select the **Age** option. Then, click .

In all records, the member name tabs (except those for members assigned the role of **Head**, **Husband**, or **Wife**) now display in descending order by age.

Users Can Now Set Their Own Start Page for Each Module

The Start page is the first page a user sees when opening a module. In this release, we added a feature that lets users set their own Start page for each module (except IQ) in ParishSOFT Family Suite.

To set a Start page:

Note

If you do not have permission to access a module, the system lets you select a Start page but does not save your selection.

1. Open the **Home** module. Then, select the **User Settings** tab.
2. In the left panel, select the **Start Pages** option.

The right panel lists the modules in ParishSOFT Family Suite for which you can set your own Start page. The page displayed in each module's dropdown list field is the current Start page.

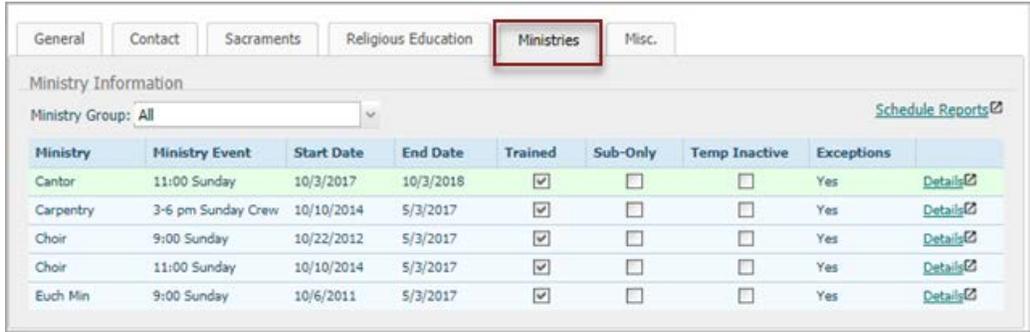
3. To change the Start page, select it from the dropdown list. Then, click .

The next time you open the module, you are taken to the new Start page.

Family Directory

Member Details Now Shows the Member's Ministry Affiliations

We added a new subtab, shown below, to **Member Details** labeled **Ministries**. The **Ministries** tab lets you quickly see what ministries the selected member belongs to along with details about those affiliations:



Ministry	Ministry Event	Start Date	End Date	Trained	Sub-Only	Temp Inactive	Exceptions	Details
Cantor	11:00 Sunday	10/3/2017	10/3/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Details
Carpentry	3-6 pm Sunday Crew	10/10/2014	5/3/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Details
Choir	9:00 Sunday	10/22/2012	5/3/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Details
Choir	11:00 Sunday	10/10/2014	5/3/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Details
Euch Min	9:00 Sunday	10/6/2011	5/3/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Details

All Added as an Option to Year Dropdown List in the Family's Giving History Record

Previously, users could only view a family's giving history for a specific year. In this release, we added **All** as an option to **Years** dropdown list to enable users to view the selected family's giving data across multiple years.

Note

*A family's giving history details can be viewed by selecting the [Giving History](#) link at the bottom of the **Family Details** tab (to the right of the **Annual Gift \$** field).*

Prompt Added to Enable Automatic Updates to the Status Field in Member Records

Previously after changing the **Family Group** setting in a family's record to **Active**, the user—if necessary—had to open each member's record to change the **Status** field's setting to **Active**.

To speed up the process, we added this prompt to enable users to instruct the application to automatically change the **Status** field's setting to **Active** in each family member's record:



Change Member Statuses to Active?

Do you also want to change all individual family members' statuses to Active?

Based on the user's response to the prompt, the system does the following:

- **Yes:** changes the **Status** field's setting in each member's record to **Active** (unless the field is currently set to **Deceased**).
- **No:** keeps the **Status** field's current setting in each family member's record.

Prompt Added to Enable Automatic Updates to Family Group and Status Fields

Previously after changing a family's registration status to "registered," the user—if necessary—had to change the **Family Group** field's setting to **Active** and open each member's record to change the **Status** field's setting to **Active**.

To speed up the process, we added this prompt to enable users to instruct the application to automatically change the settings in these fields to **Active**:



Based on the user's response to the prompt, the system does the following:

- **Yes:** changes the **Family Group** setting to **Active** in the family's record and changes the **Status** field's setting in each member's record to **Active** (unless the field is currently set to **Deceased**). Additionally, prompts the user to indicate whether the existing registration date should be changed.
- **No:** keeps the current setting both in the **Family Group** field in the family record and the **Status** field in each family member's record. Additionally, prompts the user to indicate whether the existing registration date should be changed.

Offering

All Added as an Option to Year Dropdown List in the Member's Giving History Record

Previously, users could only view a member's giving history for a specific year. In this release, we added **All** as an option to **Years** dropdown list to enable users to view the selected member's giving data across multiple years.

New Features Added to the Setup for the Contributions Postings Report

Per customer request, we added the following features to the setup for the Contributions Postings report:

- **Fund Summary** checkbox: this checkbox was added to the **Giving** filter group. If you select the checkbox, the system generates a report that contains a roll-up summary for each selected fund. The report includes no contribution details.
- **Membership Filters** group: this new group contains these filters:
 - ❖ **Family Registration:** this dropdown list contains filters that enable you to filter contribution posting data by family registration status, for example, **Active**.
 - ❖ **Family Group:** this dropdown list contains filters that enable you to filter contribution posting data by family group affiliation, for example, **Staff**.
 - ❖ **Family Workgroup:** this dropdown list contains filters that enable you to filter contribution posting data by family workgroup affiliation, for example, **School Families**.
- **Export Report** button: located in the bottom right, this button lets you export a fund summary report. Note that the button is active only if the **Fund Summary** checkbox is selected.

Three-Year Summary Report Added to Contributions Report Group

We added a new report, called **3 Year Summary**, to the **Contributions** report group. This report enables you to view giving trends of families over a user-specified three-year period.

To create a 3-Year Summary report, follow these steps:

1. If you manage several organizations, select the desired organization from the Organization dropdown list.
2. On the **Reports** page, select **Contributions > 3 Year Summary**.
3. Set up the report. To do this, complete the following:

Note

*The **Funds** grid includes only the funds you have permission to access.*

- a) On the **Fund** tab, select the individual funds whose giving data you want to view. Alternatively, select the checkbox in the header (to the left of the **Description** header) to select all funds.
- b) Click **Filters** to advance to the **Filters** tab.

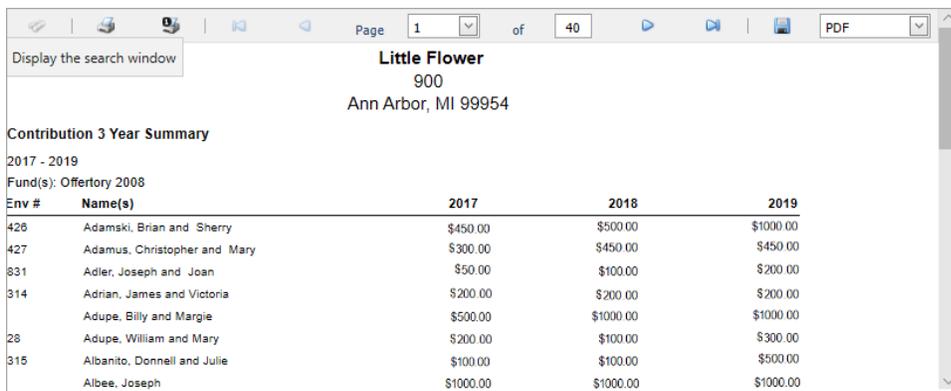
This tab enables you to apply filters to your contribution data to extract records meeting specific criteria. Do the following:

1. In the **Contribution Years** section, enter the beginning and ending years of the three-year period containing the contribution data you want to view.
 2. In the **Membership Filters** section, select filters that define the membership status of families whose contribution data you want to view, for example, **Registered**, **Active**, **School Families**.
4. Click **View Report**.

The report shows the contributions made by families in each of the years specified in the report setup, allowing you to view each family's trends in giving over a three-year span.

Note

If the report does not display, make sure your browser's pop-up blocker setting is disabled. For instructions on how to do this, consult your browser's Help.



Env #	Name(s)	2017	2018	2019
426	Adamski, Brian and Sherry	\$450.00	\$500.00	\$1000.00
427	Adamus, Christopher and Mary	\$300.00	\$450.00	\$450.00
831	Adler, Joseph and Joan	\$50.00	\$100.00	\$200.00
314	Adrian, James and Victoria	\$200.00	\$200.00	\$200.00
	Adupe, Billy and Margie	\$500.00	\$1000.00	\$1000.00
28	Adupe, William and Mary	\$200.00	\$100.00	\$300.00
315	Albanito, Donnell and Julie	\$100.00	\$100.00	\$500.00
	Albee, Joseph	\$1000.00	\$1000.00	\$1000.00

Dollar Range Report Added to Contributions Report Group

We added a new report, called **Dollar Range**, to the **Contributions** report group. This report provides helpful information to parishes that helps them to identify donor giving patterns over time and use that data to anticipate giving trends. Parishes can use the data to benchmark their performance and devise strategies to increase a fund's financial support. Giving data in the report can be shared in parochial reports to the diocese.

To create a Dollar Range report, follow these steps:

1. If you manage several organizations, select the desired organization from the Organization dropdown list.
2. On the **Reports** page, select **Contributions > Dollar Range**.
3. Set up the report. To do this, complete the following:

Note

*The **Funds** grid includes only the funds you have permission to access.*

- a) On the **Fund** tab, select the individual funds whose giving data you want to view. Alternatively, select the checkbox in the header (to the left of the Description header) to select all funds.
- b) Click **Options** to advance to the **Options** tab. Then, complete these steps:
 1. In the **Dates** section, specify the date range of donations you want to include in the report.
 2. In the **Amount Ranges** section, the system provides a default range by prepopulating the minimum and maximum dollar amount ranges, for example, \$0 to \$50 and \$500 to \$1000. Do one of the following:
 - Use the dollar amount ranges provided (the defaults).
 - Create your own custom dollar amount ranges by clicking inside the **Greater Than or Equal To** and **Less Than** fields and entering the desired minimum and maximum amounts.

Note

To reset the amount ranges to their default values, click the [Reset to Default](#) link.

4. Click [View Report](#).

The report opens in the Report Viewer. The report you see looks like the following:

Note

If the report does not display, make sure your browser's pop-up blocker setting is disabled. For instructions on how to do this, consult your browser's Help.

The screenshot shows a web browser window with the following content:

Page 1 of 1 PDF

Display the search window

Little Flower
123 Main St.
Livonia, MI 48150

Contribution By Dollar Range
Period : 01/01/2019 - 04/25/2019
Fund(s) : Offertory

Dollar Amounts	Count	Percent	Amount
Between \$0.00 and \$50.00	2	% 40	\$50.00
Between \$50.00 and \$100.00	1	% 60	\$75.00
Between \$100.00 and \$150.00	0	%	\$0.00
Between \$150.00 and \$200.00	0	%	\$0.00
Between \$200.00 and \$500.00	0	%	\$0.00
Between \$500.00 and \$1,000.00	0	%	\$0.00
Between \$1,000.00 and \$5,000.00	0	%	\$0.00
Between \$5,000.00 and \$999,999.00	0	%	\$0.00

For the specified date range, the report provides a breakdown of the number (**Count**) and total dollar amount (**Amount**) of contributions made to the selected funds within the dollar amount ranges. Within each dollar amount range, the report calculates the total contribution amount as a percentage of the overall contribution total for the period.

Comparison Report Added to Contributions Report Group

A new report, called **Comparison**, was added to the **Contributions** report group. This report enables a parish to review and compare contributions made to a single fund or to multiple funds to observe and track giving patterns and trends over a four-year period.

To generate this report, do the following:

1. If you manage several organizations, select the desired organization from the Organization dropdown list.
2. On the **Reports** page, select **Contributions > Comparison** to display the report setup.
3. On the [Fund](#) tab, select the individual funds whose giving data you want to view. Alternatively, select the checkbox in the header (to the left of the **Description** header) to select all funds.

Note

*The **Funds** grid includes only the funds you have permission to access.*

4. Click  to advance to the **Filters** tab. Then, do one of the following:
 - If you selected one fund, enter a year in the **Year** field.
 - If you selected multiple funds, enter a year in the **Year** field. Then, select a **Report Type** option:
 - ❖ **One fund per page**: shows each fund's data on a separate page.
 - ❖ **Multiple funds per page**: shows the data for multiple funds on the same page.
5. To generate the report, click .

Note

If the report does not display, make sure your browser's pop-up blocker setting is disabled. For instructions on how to do this, consult your browser's Help.

The report shows giving data for the user-specified year and for the three years preceding.

Little Flower 900 Ann Arbor, MI 99954								
Contribution Monthly, Quarterly, Yearly Comparison Report								
Fund: Offertory								
	2016		2017		2018		2019	
Jan	\$0.00	0.00 %	\$5.00	0.46 %	\$0.00	0.00%	\$0.00	
Feb	\$0.00	0.00 %	\$212.00	19.68 %	\$0.00	0.00%	\$0.00	
Mar	<u>\$0.00</u>	0.00 %	<u>\$0.00</u>	0.00 %	<u>\$0.00</u>	0.00%	<u>\$0.00</u>	
1st QTR Subtotal	\$0.00	0.00 %	\$217.00	20.15 %	\$0.00	0.00%	\$0.00	
Apr	\$525.00	9.47 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
May	\$0.00	0.00 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Jun	<u>\$73.00</u>	1.32 %	<u>\$0.00</u>	0.00 %	<u>\$0.00</u>	0.00%	<u>\$0.00</u>	
2nd QTR Subtotal	\$598.00	10.79 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Jul	\$862.00	15.56 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Aug	\$2,923.22	52.75 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Sep	<u>\$5.00</u>	0.09 %	<u>\$860.00</u>	79.85 %	<u>\$0.00</u>	0.00%	<u>\$0.00</u>	
3rd QTR Subtotal	\$3,790.22	68.40 %	\$860.00	79.85 %	\$0.00	0.00%	\$0.00	
Oct	\$3.00	0.05 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Nov	\$645.00	11.64 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Dec	<u>\$505.00</u>	9.11 %	<u>\$0.00</u>	0.00 %	<u>\$0.00</u>	0.00%	<u>\$0.00</u>	
4th QTR Subtotal	\$1,153.00	20.81 %	\$0.00	0.00 %	\$0.00	0.00%	\$0.00	
Grand Totals	\$5,541.22	100.00%	\$1,077.00	100.00%	\$0.00	0.00%	\$0.00	

Data is summed into monthly, quarterly, and annual totals, which enables you to make direct period-by-period comparisons. For example, you can compare a fund's January 2018 giving data with that for January 2019 or a fund's 4th quarter 2017 giving data with that for 4th quarter 2018.

IQ

Added Ability to Query Member Strengths

We added a new section labeled **Strengths** to the **Members** group in the **Column Picker** panel. The **Strengths** section contains five columns, corresponding to the five **Member Strength** fields (on the **Misc.** tab) in Member Details.

You can apply the columns in the **Strengths** group singly or in combination to refine a query to locate records meeting specific member strength criteria. Results show in the **Query Results** panel under the selected **Strength** column headings. If desired, you can export results to a **.csv** file. You can also use the results as a data source for mail merges.

'Is Trained' Column Added to Ministry Scheduler Group

Per customer request, we added the **Is Trained** column to the **Ministry Scheduler** group in the **Column Picker** panel. This column enables you to design queries to locate records of ministers with a certain training status (trained or not trained).

The **Is Trained** column can also be added as a condition to further refine a query's results. Results show in the **Query Results** panel under the **Is Trained** column heading. If desired, you can export results to a **.csv** file. You can also use the results as a data source for mail merges.

The **Is Trained** column uses a **Yes/No** data type. When applied as a condition, the column displays **Yes/No** values. In the **Query Results** panel, the application converts the column's Yes/No values to a checkbox: = **Yes**; = **No**. When results are exported or used in mail merges, the **Yes/No** values are converted to the following: **True** = Yes and **False** = No.

Attendance Section Added to the Religious Education Group

In the **Column Picker** panel, we added an **Attendance** section to the **Religious Education** group. Within the new section, you can select these columns to extract student attendance data:

- **Status**: this column stores text data related to student attendance. The data represents the attendance options available for leaders to select when recording student attendance in Religious Education classes: **Present, Absent, Tardy, Excused**.

When displayed in query results, the **Status** column shows actual text values for attendance, for example, "Tardy." You can add a value in the **Status** column as a query condition to further refine a query's results, for example:

```
Is equal to Tardy.
```

- **Is Present**: Yes = Present or Tardy; No = Absent or Excused.

The **Is Present** column uses a **Yes/No** data type. When applied as a condition, the column displays **Yes/No** values. In the **Query Results** panel, the application converts the column's Yes/No values to a checkbox: = **Yes**; = **No**. When results are exported or used in mail merges, the **Yes/No** values are converted to the following: **True** = Yes and **False** = No.

- **Notes**: extracts information from the **Notes** field in student attendance records.

Any column can be added as a condition to limit a query's results. Results show in the **Query Results** panel under the selected column headings. If desired, you can export Attendance results to a **.csv** file. You can also use the results as a data source for mail merges.

Columns Added to the Funds Group

The following columns were added to the **Funds** group in the **Column Picker** panel:

- **Diocesan #**: account number or ID in your diocesan accounting system.
- **External #**: an account number or ID in an external system (for example, a QuickBooks account number).
- **Revenue Account**: revenue account associated with the fund.

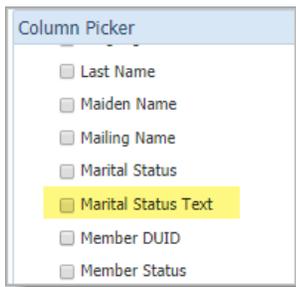
Any of the columns can be added singly or in combination as conditions to further refine a query's results. Results show in the **Query Results** panel under the selected column headings. If desired, you can export results from the panel to a **.csv** file. You can also use the results as a data source for mail merges.

Department Column Added to Religious Education Group in Column Picker

We added a **Department** column to the Religious Education group in the Column Picker. Users can select this column for queries and add it as a condition to further refine query results. Results show in the **Query Results** panel under the **Department** column heading. If desired, you can export results to a **.csv** file and use them as a data source for mail merges.

'Marital Status Text' Added to Column Picker

The **Members** group in the **Column Picker** panel features a new column called **Marital Status Text**.



This column enables users to build queries that retrieve marital status text descriptions (for example, Widowed or Separated) for members.

You can add the **Marital Status Text** column as a query condition to further refine a query's results, for example:

```
Members Marital Status Text is equal to Single
```

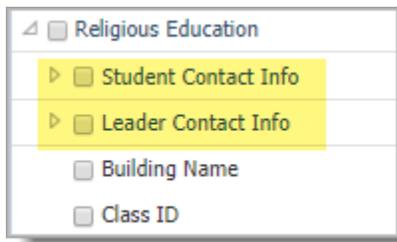
```
Members Marital Status Text starts with W
```

Results show in the **Query Results** panel under the **Marital Status Text** column heading. If desired, you can export results to a **.csv** file. You can also use the results as a data source for mail merges.

Student and Leader Contact Information Sections Added to Religious Education Group

The **Column Picker** panel features two new sections in the **Religious Education** group:

- **Student Contact Info.**
- **Class Leader Contact Info.**



Expanding these sections displays columns you can select to create queries that extract specific student and leader contact information, such as email addresses and cell phone numbers.

You can apply any of the columns singly or in combination as query conditions to further refine your query's results. Results show in the **Query Results** panel under the selected column headings. If desired, you can export results to a **.csv** file. You can also use results as a data source for mail merges.

A column's data type determines how values in the column are displayed. Any column that has a **Yes/No** data type displays values in the following way:

- **Yes/No:** when expressed as a query condition.
- Checkbox: = Yes; = No when displayed in query results.
- **True/False:** when exported and used in mail merges.

Pledge Summary By Year Group Now Includes the Year 2019

The year 2019 was added to the **Pledges > Pledge Summary By Year** group in the **Column Picker** panel.

Resolved Issues

Offering

Combined Filters in Contribution Summary Report Setup Now Produce Accurate Results

Previously in the Contribution Summary report setup, combining the **Include Non-Givers** filter with the **Registered, and Active** membership filters created a conflict. As a result, the list of records shown in the **Givers** grid was sometimes incorrect. We resolved the filter conflict. When combined, the filters now generate the right records.

IQ

Logical Operators in Secure Fields Condition Statements No Longer Produce an Error

Previously, queries that contain certain operators (for example, **Contains** and **Does Not Start**) in Secure Field condition statements returned an error. We fixed this issue. All operators used to define Secure Field conditions now work successfully.

Controls Added to Prevent Unauthorized Staff Users from Querying Parish Contribution Data

Previously, staff users who transferred assignments from one parish to another within the same diocese could sometimes view the former parish's contribution data in results of contribution queries created at the new parish. We fixed this issue. Controls were added to prevent staff from extracting contribution data owned by an organization they no longer have access rights to.

Administration

Duplicate New User Registrations Removed from User Registrations Grid

Previously, new user registration requests pending administrator approval appeared as duplicate entries in the **Suspense > User Registrations** grid. We removed duplicates from the grid and fixed the issue that caused the system to generate duplicate entries.

Staff List Grid No Longer Missing Entries in the Primary Position Column

Previously, the **Primary Position** column in the **Staff List** grid sometimes did not display a staff user's primary position. We fixed this issue.

ParishSOFT Diocesan Suite

What's New

IQ

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. Query results containing life events comments for members now display in natural, human-readable language.

Saved Queries Using Date and Time Columns No Longer Produce Error When Opened

Previously, users experienced the following error when trying to open saved queries that included Date and Time column conditions:

```
String not recognized as a valid DateTime
```

Queries containing Date and Time column conditions can now be opened and run successfully.

Subsequent Updates to the 4.5.0 Release

We strive to ensure a problem-free version update. Nevertheless, some issues occasionally arise after a major release. We fix such issues quickly in subsequent updates to the software. The following table lists the issues that were encountered in the v4.5.0 release that were quickly resolved in a subsequent update.

Table 1. Issues Resolved in the v4.5.0.1 Update

Module	Issue Description	Update
Offering	<p>In the setup for the Contribution Summary report, when advancing to the Givers tab, users experience an error if these filters are applied on the Filters tab:</p> <ul style="list-style-type: none"> • The Registered or Not Registered option is selected from Family Registration dropdown list. <p>AND</p> <ul style="list-style-type: none"> • The Include Non-Givers checkbox is deselected. 	The combined filters no longer cause an error.
	<p>Users experience the following error when attempting to generate a quick report from the Contribution List page:</p> <p>Given key not present in the dictionary.</p>	Users can successfully generate a quick report from the Contribution List page without experiencing an error.

Contacting ParishSOFT

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

	https://support.parishsoft.com
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)