VERSION 4.4.2 RELEASE NOTES

These release notes document new features, changes, and enhancements in Release v4.4.2 of the AIM Suite.

Contents

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AIM Suite

Family Directory

Resolved Issues

Family Details

Address Trigger Now Working As Expected to Update a Family's Primary Address

Previously, the trigger on the **Valid to** date field on the **Other** tab did not consistently work as expected to update the family's primary address in Family Details and in the Family List. As a result, the addresses shown for **Primary** in these areas of the application sometimes differed. We resolved this issue. Address changes are now consistently applied.

Missing Details in Annual Giving History by Fund Section Restored

Previously when the user opened **Giving History**, the **Annual Giving History by Fund** section was missing details. The system displayed this message: `No records found`. If the family has an annual giving history, these details were restored.

Merge Families

Resolved Issues

Duplicate Search Now Working As Expected

We fixed an issue that caused the duplicate search function to find fewer duplicate records than expected given the search criteria.

DDM

Enhancements and Updates

Reports

Batch DUID Added to the Lockbox Import Report

In response to customer feedback, we updated to the Lockbox Import report to show the batch ID on contributions that result in an overpayment of a pledge. Every transaction listed in the report is now tagged with a batch ID, which enables you to reference the specific batch a contribution belongs to.

Resolved Issues

Reports

Batch Detail

Long OBO Parish Names Now Truncated

Previously in the Batch Detail report, long OBO parish names could not be displayed on a single line so they were carried over to a second line. This issue sometimes increased the number of pages required to print the report. We fixed the problem by truncating long names so that they now fit on one line only.

Pledge Date Now Appears in the Batch Detail Report

Previously, the pledge date was missing from the Batch Detail report. The report now includes pledge date information.

Pledges

System Now Automatically Removes the Down Payment for a Deleted Pledge

Previously after the user deleted a pledge that had a down payment associated with it, the system sometimes did not remove the down payment when it should have. We resolved this issue.

Rounding Errors Eliminated from Pledge Total Calculations

We fixed an issue that occasionally caused the calculations of pledge totals to be slightly off in the system due to a rounding error.

Imports

Checks Added to Prevent Contributions from Being Imported to Parish Funds

Previously, if an Online Giving import file contained a contribution associated with a Fund ID that matched the ID of a parish fund, the system imported the contribution to a parish fund when it should not have. To prevent this problem from occurring, we now run a Fund ID check on the import file. This check verifies that a contribution's Fund ID is associated with a diocesan fund. If the system encounters a contribution associated with a non-diocesan Fund ID, it rejects the contribution and moves on to process the remaining contributions in the import file. A reason for the rejected import is given in the Import Report.

Lockbox Import Process Now Validates the Fund ID of Pledges in a Batch

We fixed an issue that caused the system to allow contributions whose pledge fund DUID differed from the fund DUID specified in the batch header to be imported. This issue caused the contributions to be imported to the wrong fund (the fund identified in the batch header). Now, the system compares fund IDs. If a mismatch is found, the system rejects the contribution and provides a reason for the import failure in the Lockbox Import report.

Status Animarum

Resolved Issues

System No Longer Prevents Some Users from Logging In

Previously, users whose last name begins with 'Z' were prevented from logging in to the system. We fixed this issue.

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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:

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