



Version 3.7.34

This release includes enhancements and changes to modules in the Parish and AIM suites and Diocesan Development Manager.

Parish Suite Updates

The Parish suite includes a number of key updates, enhancements, and changes, which are documented in the following sections.

User Guide Enhancements

- **NEW! User Guide Can Now Be Viewed While an Application Is Running**

You can now view the user guide while simultaneously working in an application in the Parish suite.

- **User Guide Now Displays in a Web Browser If No Local Copy Exists**

When you click the **Help** button or select a user guide from the menu, the guide opens in the default PDF reader. If the guide is not in the local documentation folder, the application opens a Web browser and displays the user guide in a browser window.

- **User Guide Accessibility Issues Resolved**

User guides are now accessible from the application. From the Main menu, select **About**. Then, click

to display the user guide for the current module:



We also added a user guide option to the **Help** menu in the current module for the following applications:

- Time and Talent
 - ❖ Minister Directory
 - ❖ Liturgical Scheduler
- Offering
 - ❖ Post Contributions
 - ❖ Manage Membership Pledge Records
- Family Directory
 - ❖ Family details
 - ❖ Member details
 - ❖ Edit/View Sacrament details
 - ❖ Main Family List view
- Religious Education
 - ❖ Main Student Directory view

To access the user guide, select **User Guide** from the application's **Help** menu, as shown in the following illustration:



Windows 7, Windows Vista, and/or Windows XP Enhancements

- **Default Backup Path for Windows 7, Windows Vista, and Windows XP Users Changed**

To enable Windows 7, Windows Vista, and Windows XP users to back up files locally, we moved the local backup path out of the installation folder within the **Program Files** directory.

- ❖ For Windows 7 and Windows Vista : C:\Users\Public\ParishSOFTData\Backup
- ❖ For Windows XP: C:\Documents and Settings\All Users\ParishSOFTData\Backup\

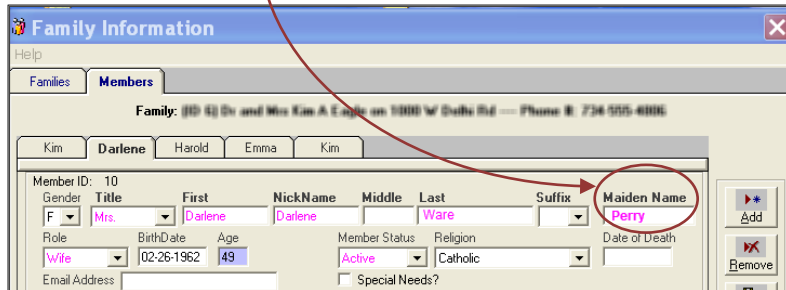
- **Windows 7 Mail Merge Issue for Bannan Letters Resolved**

We resolved Windows 7 issue that caused a file access error to occur when the application attempted to complete the mail merge process for Bannan Letters. The application now writes the file to the correct location.

Family Directory Enhancements

- **NEW! Maiden Name Field Added**

We added the **Maiden Name** field to the **Members** tab:



The screenshot shows the 'Family Information' window with the 'Members' tab active. The family name is 'Darlene'. The member details for Darlene are shown below. The 'Maiden Name' field is highlighted with a red circle and an arrow pointing to it from the text above. The field contains the value 'Perry'.

Member ID:	10
Gender:	F
Title:	Mrs.
First:	Darlene
NickName:	Darlene
Middle:	
Last:	Ware
Suffix:	
Maiden Name:	Perry
Role:	Wife
BirthDate:	02-26-1962
Age:	49
Member Status:	Active
Religion:	Catholic
Date of Death:	
Email Address:	
Special Needs?	<input type="checkbox"/>

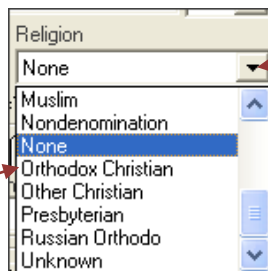
The field is enabled only if the member is female and has a matrimony record. All users can view the field; however, only a user with **Add/Edit** permissions in Family Directory can change information in the field.

- **Member Details Tab Enhanced**

- ❖ To users save time and make it easier to enter member information, we rearranged the fields on this tab.
- ❖ We resolved an issue that prevented the application from remembering the last tab selected after the user exits and then returns to the **Member** details tab.

- **Religion Field Enhanced**

- ❖ A user can now see the **Religion** field on the **Members** tab for all members. However, only a user with **Add/Edit** permissions in Family Directory can change information in the **Religion** field.
- ❖ The default option for a member's religious affiliation is displayed in the **Religion** field. The default varies depending on the member's status (for example, if a member's status is not known, **Unknown** is displayed). To change the default option, select it from the **Religion** list box, as shown in the following illustration:



The screenshot shows a 'Religion' list box with the following options: None, Muslim, Nondenomination, None (highlighted), Orthodox Christian, Other Christian, Presbyterian, Russian Orthodo, and Unknown. A red arrow points to the 'None' option.

- ❖ We added **Orthodox Christian** to the list of religious affiliation options in the **Religion** list box.
- ❖ The **Religion** option for a new active member defaults to the religion that corresponds to the denomination of the organization (church). Current options are: **Catholic** or **Orthodox Christian**.

- **Date Deceased Field Enhanced**

The **Date Deceased** field can now be seen by all users. Only a user with **Add/Edit** permissions in Family Directory can change the information in this field.

- **Graduation Year and Grade Miscalculation Issue Resolved**

We resolved an issue that caused the member’s age and grade to be miscalculated if the birth date was later than the current date (today’s date).

- **Graduation Year and Grade Year Incorrect Prompt Resolved**

We resolved an issue that caused a message to display prompting members to reset the **Grad Year** value even if a change was not made to the **Birthdate** field. The application now prompts the user to reset the **Grad Year** value only when a change is made to the **Birthdate** field.

- **Sacrament Templates Now Updated with Maiden Name Field**

We modified the sacrament templates to use a member’s maiden name, if present. Otherwise, the member’s last name is used.

Notify Now Enhancements

- **“Blue Alert” Message Phone List Expanded**

Members can now select all available phone numbers (just as they can for **Phone 1** through **Phone 3**) when setting up a “Blue Alert”.

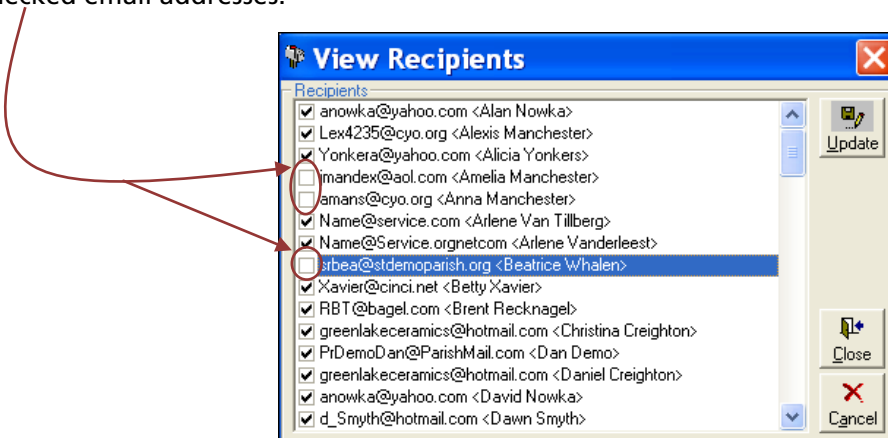
- **Distribution of High-Volume Notify Now Messages Resolved**

We resolved an issue that prevented the application from sending **Notify Now** messages to all designated recipients if the size of the distribution list exceeded an internal threshold. The application now sends all **Notify Now** messages no matter the size of the distribution list.

ParishSOFT Email Enhancements

- **Unchecked (Excluded) Email Recipients Receiving Email Issue Resolved**

We resolved an issue that caused recipients who should not have received emails (unchecked email addresses in the **View Recipient** window) to receive emails. The system no longer sends emails to unchecked email addresses.



- **Multiple Recipients Not Receiving Email Issue Resolved**

We resolved an issue that prevented multiple recipients in a family from receiving emails even if each recipient's email address was listed in the family record. All listed email addresses—up to a maximum of five per family—now receive a copy of an email message addressed to multiple recipients.

As shown in this example, to send an email to multiple recipients, separate each email address with a a semicolon (;):

jsmith@parishsoft.com;asmith@parishsoft.com;wsmith@parishsoft.com

Offering Application Enhancements

- **Wording of Info Tips Modified**

- ❖ We made a slight modification to the infotip description for the Print Family Notification Letter. The new description is as follows: "Print Family Notification Letter".
- ❖ We made a slight modification to the infotip description for the **Contribution Receipt** button. The new description is as follows: "Print Donor Receipt".

- **Edit Contributions Function Enhanced**

If a user changes a contribution to a fund that has multiple pledges to it, the application now prompts the user to select which pledge the contribution should be posted to.

- **Search-By-Envelope-Number Function Now Returns Exact Matches Only**

The search-by-envelope-number function is now set up to perform searches that match on the exact number entered.

- **Post Contributions Error Resolved**

We resolved an issue that occasionally caused the application to issue the following error message when a user attempted to rapidly post a contribution using an envelope number:

```
91: Object variable or With block variable not set
```

Religious Ed Enhancements

- **Religious Ed Calendar Export Issue Resolved**

We resolved an issue that caused the Religious Ed calendar to be exported to the wrong directory.

- **Multiple Emails Issue Resolved**

We resolved an issue that caused the application to send one email to each student listed in the Student Directory. This caused families with more than one student to receive duplicate emails. The application now sends only one email per family.

Time and Talent Enhancements

We resolved an issue that caused the application to send one email per entry in Minister Directory. This resulted in ministers involved in more than one ministry receiving the same email multiple times. The application now sends only one email per email address.

ParishSOFT Reports Enhancements

- **NEW! Non-Performing Pledges Report Added**

Users can now create a report that lists non-performing pledges.

- **Address Line 2 Information Now Displays**

If **Address Line 2** information exists, it is now displayed in the following reports:

- ❖ Pledge Statements
- ❖ Detail Family Statement
- ❖ Detail Family by Member Statement
- ❖ Detail Member Statement
- ❖ Summary Family Statement
- ❖ Summary Family by Member Statement
- ❖ Summary Member Statement
- ❖ Summary Family Average per Sunday

- **Pledge Revenue Projection Report Enhanced**

- ❖ **NEW!** report layout. We added a **Calendar Year** option and a **Fiscal Year** option to let you create calendar year and fiscal year reports.
- ❖ Revenue projection reports now include all pledges having payments that are being received during the time period in which the report is being created.

- **Member's Birthday Report Issue Resolved**

We resolved an issue that prevented the **Find Template** button from functioning correctly when accessed from the **Members Birthdays** screen (**Reports > ParishSOFT Reports > Census Reports > Member Reports > Birthdays**).

- **School-Year Cloning Issue Resolved**

We resolved an issue that caused the Clone School Year function to issue an error message if a class description contained a word with an apostrophe. A class that contains an apostrophe in its description can now be cloned.

- **Elevated Handle Count Issue Resolved**

We resolved an issue that caused an increase in handle counts. The increased handle count was experienced most often upon initial access of ParishSOFT reports.

- **Incomplete Member Information on Family Registration Form Resolved**

We resolved an issue that caused the Family Registration form for Orthodox organizations to contain incomplete family member information.

AIM Suite Updates

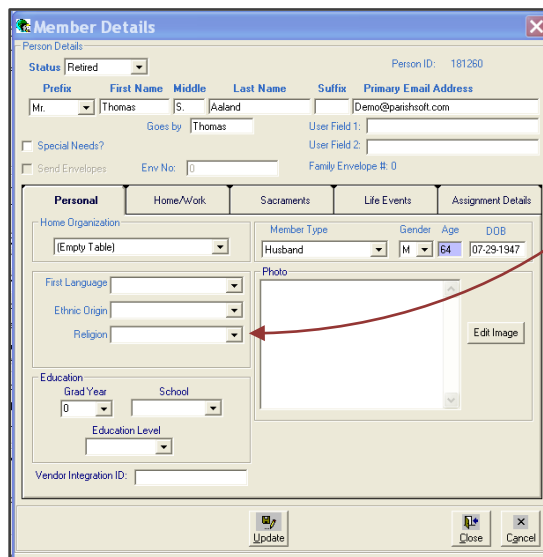
The AIM suite includes a number of key updates, enhancements, and changes, which are documented in the following sections.

Family Directory Enhancements

AIM Family directory includes a number of key enhancements and changes, which are documented in the following sections.

- **NEW! Diocesan Users Can Now Select a Member's Religion**

A diocesan user can now select a member's religious affiliation from the **Religion** menu.



The screenshot shows the 'Member Details' window with the following fields and options:

- Status: Retired (dropdown)
- Person ID: 181250
- Prefix: Mr. (dropdown)
- First Name: Thomas
- Middle: S.
- Last Name: Aaland
- Suffix: (empty)
- Primary Email Address: Demo@parishsoft.com
- Goes by: Thomas
- User Field 1: (empty)
- User Field 2: (empty)
- Special Needs?:
- Send Envelopes:
- Env No: 0
- Family Envelope #: 0
- Home Organization: [Empty Table] (dropdown)
- Member Type: Husband (dropdown)
- Gender: M (dropdown)
- Age: 64
- DOB: 107-29-1947
- First Language: (dropdown)
- Ethnic Origin: (dropdown)
- Religion: (dropdown) - A red arrow points to this field.
- Photo: (empty) with an 'Edit Image' button.
- Education: Grad Year: 0 (dropdown), School: (dropdown), Education Level: (dropdown)
- Vendor Integration ID: (empty)
- Buttons: Update, Close, Cancel

- **User's Filter Setting Selections Now Retained After Logout**

The Family Directory application now remembers a user's filter settings so that the next time the user logs in to the application on the same machine, the filter settings selected prior to logging out are retained.

- **Family Workgroups Can Now Be Edited**

Diocesan users can now edit family workgroups that were created in AIM Family Directory under the diocesan organization.

- **"Last Updated Date" Field Now Auto-Updates**

When a family is added through the **Add Family Quick Entry** window, the **Last Updated Date** field is now automatically updated on the **Family Details** screen.

- **License Code Format Enhanced to Offer Improved Security**

To improve system security and functionality we made key enhancements to the license code format.

- **Family Record Log Now Records Entry Method Used to Add the Family**

The family record log now notes whether the family was entered into the system by means of the **Add Quick Family** method or by means of the standard entry method.

- **A Family's Other Parish Associations Are Now Viewable**

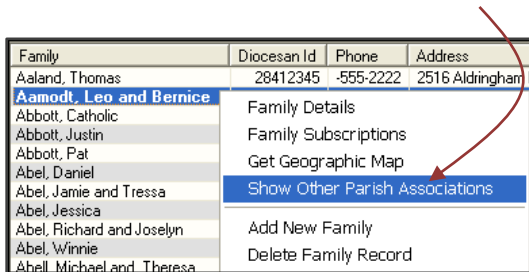
Diocesan users can now view all of the parishes a selected family is associated with. Use either of the following methods to view this information.

Note

*The main **Family** and/or **Member** details screens continue to display information for the family's or member's parish of registration.*

Method 1:

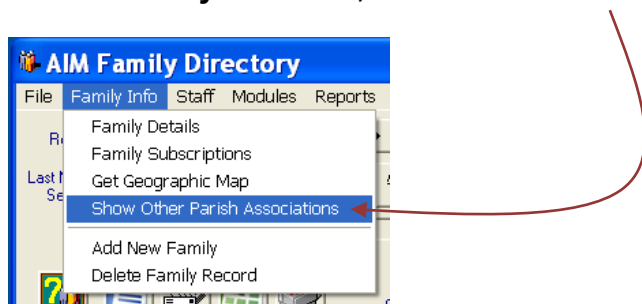
1. Right-click the desired name of the family in the **Family** list.
2. Select the **Show Other Parish Associations** option:



A list of other parishes the selected family is associated with is displayed.

Method 2:

1. Select the desired name of the family in the Family List.
2. From the **Family Info** menu, select the **Show Other Parish Associations** option:



A list of other parishes the selected family is associated with is displayed.

- **City in Multiple Postal Code Zone Now Validated**

The correct city now appears in the family address record when a family is added through the **Add Family Quick** entry window and when the postal code has more than one city associated with it.

- **Invalid Registration Change Issue Resolved**

We resolved an issue that caused an “Invalid Registration Change” message to display when a user opened an unregistered family record.

- **Invalid Language Setting Issue Resolved**

We resolved an issue that caused an invalid error message to display when members attempted to change the language setting.

- **Emergency Phone Number Issue Resolved**

We resolved an issue that caused the Emergency Phone number to be removed when a user updated a family record.

- **Newly Added Family Address Issue Resolved**

We resolved an issue that caused the address for a newly added family to default to **Other** for the address type. When added to the system initially, the address for a newly added family defaults to **Home**.

AIM Sacramental Registry Enhancements

We added a new column labeled Member Status to the following sacraments:

- Baptism
- Holy Orders
- Religious Profession
- Matrimony

Catholic Directory Manager Enhancements

We made the following changes and enhancements to Catholic Directory Manager:

- **Main Menu Reorganized**

We reorganized the CDM **Main Menu** to help you better manage the new-year setup process and the form submission review process. You can now find these processes under **Setup Options** and **Report Management**, respectively.



- **Reload Personnel Button Added to CDM Data Entry Form**

We added this new button to the **Personnel Information** section of the CDM data entry form: .



CAUTION

After you click the Reload Personnel button, any changes you made to the personnel information section on the CDM entry are erased. To avoid losing any changes when you review personnel for CDM submission, follow the recommended process in the following section: [Changing Personnel Information on the CD Entry Form](#).

When clicked, this button pulls CDM staff information from the current staff list on the ParishSOFT staff management screen, enabling you to keep the staff list current on the CDM data entry form. You can also use this button to update the information of staff added to your staff list after the CDM form was opened.

Changing Personnel Information on the CD Entry Form

To change personnel information on the CD entry form:

1. Log in to the CDM form.
A new CDM form for the current year is created for you.
2. Review the personnel list for completeness. If you need to add or remove a staff member, go the manage staff list in your ParishSOFT application (**Diocesan Directory > Online Staff Management** or the **Staff Management** screen from a parish suite module) and make the necessary changes.

3. Return to the CDM form.

4. Click .

The changes you made in Diocesan Directory or in the parish suite module are automatically loaded in to the CDM form.

5. Enter any additional personnel information that is required for CDM (for example, the **Person ID**).

6. Click .

The information is saved in the CDM form.

- **Data Entry Fields Added to the Statistical Overview Screen**

We added several statistical sections from the Kenedy report to the **Statistical Overview** screen.

Personnel	
1 Cardinal	112
1a Retired Cardinal	223
2 Archbishop	334
2a Retired Archbishop	445
3 Bishop	556
3a Auxiliary Bishops	667
3b Retired Bishops	778
4 Abbots	889
4a Retired Abbots	990
7 Religious Priests resident in your Diocese	6665
8 Total Priests in your Diocese	7776
9 Extern Priests resident in your Diocese	8887
10 Ordinations	
10a Diocesan Priests (of your diocese no matter where they are ordained)	9998
10b Religious Priests (ordained in your diocese)	11119
Transitional Deacons (of your	

These sections are formatted as data entry fields to allow you to manually enter items that are not tracked in ParishSOFT software. This enhancement also enables you to capture all of your statistical data in a single location.

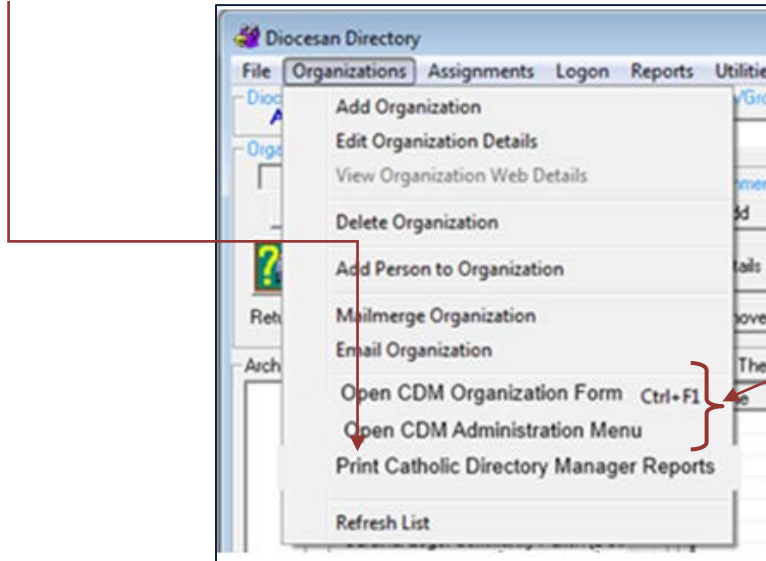
- **Report Files Modified**

We made minor modifications to the report files to better match the printing of Kenedy forms.

- **Links in the Organizations Menu for Diocesan Directory Modified**

We made the following enhancements to the **Organizations** menu for Diocesan Directory:

- ❖ To improve the consistency of terms, we renamed the two OCD links: **Open CDM Organization Form** and **Open CDM Administration Menu**.
- ❖ To improve access to the printed reports manager, we added the **Print Catholic Directory Manager Reports** option.



- **CDM Data Entry Form Enhanced**

We made the following enhancements to the CDM Data entry form:

- ❖ All updates to organization information are now captured on the **Reconcile Parish/Organization Submitted Changes** screen. The CDM administrator can then reconcile the changes with the organization information in Diocesan Directory.
- ❖ For parishes with multiple child organizations, the child form now correctly prints with the parent parish's CDM form.
- ❖ This change affects parishes with similar types of child organizations (for example, multiple missions) and with different types of child organizations (for example, a mission, a school, and a retreat center).
- ❖ We improved the **Signature Title** and **Date** entry fields on the data entry form. Staff can now enter the signature title and date directly on the data entry form in the software. As a result of this enhancement, staff no longer need to first print the form, and then manually enter the information on the print-out.
- ❖ A drop-down list box now replaces the **Position Held** field in the **Current Personnel Information** section of the data entry form. The list box shows only those positions set by the diocesan administrator.

- ❖ For each organization type, we added an **Address 2** field to both the CDM data entry form and the printed CDM form. You can use this field to specify additional address information, such as a P.O. Box.
- ❖ After you select the **Final Submission to Dioceses** checkbox, all fields on the CDM form are locked and cannot be changed. The form is then submitted to the diocese.
- ❖ We added the city after the name of the parish or organization on the CDM questionnaire management screen (displayed as the **Online Catholic Directory Status and Batch Printing** screen). This enhancement enables administrators to distinguish between parishes having the same name (for example, between St. Joseph, Canton and St. Joseph, Pinckney).

Safe Environment Program (SEP) Enhancements

We corrected an issue that was causing members with post-dated release dates on their assignments not to appear in the following SEP reports:

- Screening Expirations
- Check Incomplete
- Training Status by Parish
- Summary by Parish
- Compliance Audit by Organization

These reports now include staff members who have a release date that occurs in the future.

AIM Duplicate Checker Enhancements

We made the following changes and enhancements to the Duplicate Checker application:


- **Speed and Accuracy of Data Merges Improved**

We improved the speed and accuracy of merges of the data in family and member records. Diocesan users can now complete all types of merges of family records from AIM. The results are then synchronized down to the parishes associated with those records.

Note

In a future update, we will add the ability to merge individual members independent of family membership.

- **User Guide for Diocesan Administrators Updated**

We updated the user guide for diocesan administrators. To access the guide, select **About** from the Main menu. Then, click .

AIM IQ Enhancements

We made the following changes and enhancements to the AIM IQ application:

- **New Data Model Allows Queries of Secure Information Fields**

A new Data Model allows staff to use the new Diocesan Directory **Secure Information Area** and then query information in that area from within AIM IQ. This new Data Model prevents users who do not have access to the **Secure Information Area** from running queries that contain secure member information.

- **Two new AIM IQ Access Rights Permissions Added**

We added two new access permissions: **AIM IQ View Access** and **AIM IQ Edit Access**.

Diocesan Directory & Web Solutions		ParishSOFT Modules	
<input type="checkbox"/> System Administrator	<input type="checkbox"/> Diocesan Administrator	<input type="checkbox"/> Org. Administrator	<input type="button" value="Select All"/>
Organizations	Members	Workgroups	Web Solutions
<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Home Page
<input checked="" type="checkbox"/> Edit/Add	<input checked="" type="checkbox"/> Edit/Add	<input type="checkbox"/> Edit/Add	<input type="checkbox"/> Calendar
<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Documents
<input checked="" type="checkbox"/> Print	<input checked="" type="checkbox"/> Print	<input type="checkbox"/> Print	<input type="checkbox"/> Forms
Development Manager	Other Permissions	ConnectNow	Subscription Mgr
<input checked="" type="checkbox"/> DDM User	<input type="checkbox"/> SEP Global Administrator	<input checked="" type="checkbox"/> ConnectNow Access	<input type="checkbox"/> Subscription Mgr Admin
<input type="checkbox"/> DDM Administrator	<input type="checkbox"/> Has Secure Field Access	<input type="checkbox"/> Suspense Reviewer	<input type="checkbox"/> Subscription Mgr User
<input type="checkbox"/> View Bank Accts	<input type="checkbox"/> AIM IQ View Access	<input checked="" type="checkbox"/> CN DDM Reports	
	<input type="checkbox"/> AIM IQ Edit Access		

The **AIM IQ View Access** option enables view-only access whereby a staff member can load and run existing database queries. The **AIM IQ Edit Access** option, on the other hand, gives a staff member full access. The staff member can load and run existing queries as well as create new queries and modify existing ones.

To grant a staff member edit access, first select the **AIM IQ View Access** option. The **AIM IQ Edit Access** option is then activated and can be selected.

- **Diocesan ID Needs the Check Digit (AIM-IQ) option**

This custom option is on the **Families** menu in AIM-IQ and titled **Check Digit (Diocesan ID)**.

- **Label for Check Digit Option Modified**

The former **Check Digit** option, which was used for scanline for payment reminders, has a new label: **Check Digit (Scanline)**.

- **Run-Time Error Caused by Long AIM-IQ Queries Resolved**

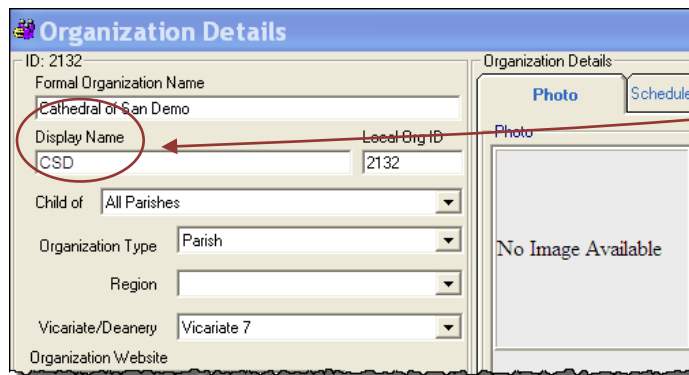
We resolved an issue that prevented exceptionally long or complex AIM-IQ queries from saving correctly or causing a run-time error. We expanded the field in the database from 8000 characters to a maximum length **varchar**.

Diocesan Directory Enhancements

We made the following changes and enhancements to Diocesan Directory:

- **NEW! Field Added to Organization Details**

We added a new field to the **Organizational Details** screen. The field is labeled **Display Name**:



The screenshot shows the 'Organization Details' form for ID: 2132. The 'Formal Organization Name' is 'Cathedral of San Demo'. The 'Display Name' field is circled in red and contains the text 'CSD'. The 'Local Org ID' is '2132'. Other fields include 'Child of' (All Parishes), 'Organization Type' (Parish), 'Region', 'Vicariate/Deanery' (Vicariate 7), and 'Organization Website'. A 'Photo' field is also present, showing 'No Image Available'.

The **Display Name** field allows a diocesan administrator to create an alternate organization name that appears on Diocesan Development Manager reports. You can enter an abbreviated form of the organization's formal name or a more commonly used version. The advantage of entering a shortened name is that, when the short-form version is displayed in reports, it frees up space that is needed for other types of information.

- **Organization Column Enhancement**

To prevent confusion between organizations with the same name, we added the city name after organization name in **Organization** column on the main staff grid.

- **Password Change Issue Resolved**

We resolved an issue that prevented users from changing a password through the Diocesan Directory login screen. Users can now successfully change a login password through this module.

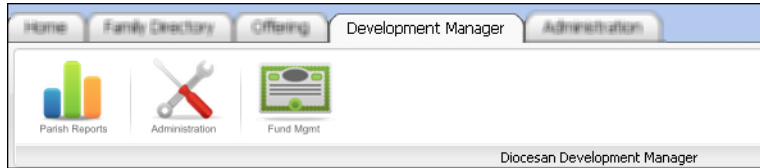
Diocesan Development Manager Enhancements

We made the following changes to Diocesan Development Manager:

CN.DDM (Web Application)

- **NEW! Navigation Bar Buttons**

As a result of our design strategy to enhance user experience, we are using a standard navigation bar in every ConnectNow application, including DDM. The navigation bar (see the illustration below) is docked across the top of the applications' main window and contains button controls that give you quick access to its main functions:



ConnectNow DDM Navigation Bar

The CN.DDM navigation bar buttons belong to a standard set of buttons that are being used to provide a consistent look and feel across the entire ConnectNow product family. Following are descriptions of the CN.DDM buttons:

Note

*The buttons displayed on your navigation bar may differ from those shown in the previous illustration. Users with DDM Administrator permissions may also see the **Administration** button.*



(Parish Reports) displays options for generating DDM reports.



(Administration) displays options for setting up the DDM module for system-wide use. Only DDM administrators can configure Administration options.



(Fund Mgmt) displays options for setting up and managing your organization's DDM funds. Only DDM administrators can configure Fund Management options.



(Bank Mgmt) displays options for setting up and managing your organization's bank accounts.



(System Setup) displays options for setting up the DDM module for system-wide use. Only ParishSOFT personnel can configure System Setup options.



Parish Reports

- **New! Parish Roster Report**

We added the Parish Roster report. This report contains a list of all of the registered families in the organization you select.

- **Parish Master Report Updated**

The Parish Master report consolidates the one-page parish summary for the selected fund, the list of givers, and the list of non-givers. The updates and enhancements made to this report are highlighted in the following illustration:

Parish address, phone number, and email address displayed

The graph enables you to visually compare the data. You can view the parish goal, amounts pledged, and amounts

You can view shortfall amounts, broken out into three main categories (anticipated, actual, and amount due).

You can also view details showing how the shortfall amount was calculated.

You can view the anticipated refund and view details showing how the refund was calculated.

Parish Master Report
CSA 2009 as of October 28, 2011 (with 1 remaining periods)

Good Shepherd Parish, Chicago - 155
3459 West 68th Street, Chicago IL 60627 - (773) 873-9077 - mnash@goodshepherd.com

Goal:	\$6,046.00	Families:	617
Total Pledged:	\$13,212.00	Pledges:	114
Total Paid:	\$9,805.88	Pledges fully paid:	Not calculated
Pledge balance:	\$3,406.12	Pledges outstanding:	Not calculated
		Average Pledge:	\$115.89

Refund Anticipated:	\$7,166.00	Shortfall Anticipated:	\$0.00
Refund Issued:	\$0.00	Shortfall Actual:	\$0.00
Refund Due:	\$3,759.88	Shortfall Due:	\$0.00

Pledge Statistics		Refund Calculation		Shortfall Calculation		Shortfall Prnt Calculation	
2500 and up:	0	Pledged:	\$13,212.00	Goal:	\$6,046.00	Pledged (incl. Shortfall acct):	\$13,212.00
1000...:	2	Goal:	\$6,046.00	Pledged:	\$13,212.00	Anticipated Shortfall:	none
500...:	0	Anticipated Refund:	\$7,166.00	Anticipated Shortfall:	none	Anticipated Shortfall:	none
250...:	5	Payments (incl. Shortfall):	\$9,805.88	Goal:	\$6,046.00	Remaining Periods (+):	1
100...:	81	Goal:	\$6,046.00	Payments (incl. Shortfall):	\$9,805.88	Current Shortfall Due:	\$0.00
75...:	1	Actual Refund Total:	\$3,759.88	Actual Shortfall:	none		
50...:	0	Less Refunds Issued:	\$0.00				
25...:	3	Current Refund Due:	\$3,759.88				
10...:	8						
0...:	4						

Parish Master Report Enhancements

In addition, we made the following changes to the Parish Master report:

- ❖ We changed the orientation of the report from portrait to landscape.
- ❖ We added the ability to include or exclude the Givers list and the Non-Givers list from the report.

- ❖ We removed the 10-parish limit. We still recommend that you limit your report to include 10 parishes or fewer.
- ❖ Multiple Addresses Issue Resolved
- ❖ We resolved an issue that caused multiple or non-primary addresses for a given family to display in the **Givers** and **Non-Givers** sub reports.

- **All Parishes Summary Report Issue Resolved**

We resolved an issue the caused the value in the **% of Goal Pledged** column to be inserted in the **% of Goal Paid** column. The correct value now appears in the **% of Goal Paid** column.

- **Additional Modifications to Parish Reports**

- Missing Pledges Issue Resolved

We identified an issue that caused a pledge not appear in certain DDM reports if the user forgot to select an OBO parish or if the fund does not use OBO pledges. The issue is resolved. The pledges now appear in reports and are labeled "Unknown".

- Line Separator's Location Modified

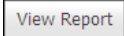
To help make the content more readable, we modified the location of the line separator. It now appears after every third line in the file in the following reports:

- All Parishes Summary
- All Parishes Refund Shortfall
- Parish Roster
- Parish Master Report (in the Givers and Non-Givers sub reports).

- Blank Row in CSV Exports Resolved

We fixed an issue that caused a blank row to display between lines of data in the CSV export.

- System Error Message Issue Resolved


We resolved an issue that caused the application to issue a "system error" message if no funds were listed in the **Select a Fund** dropdown menu and the user clicked .



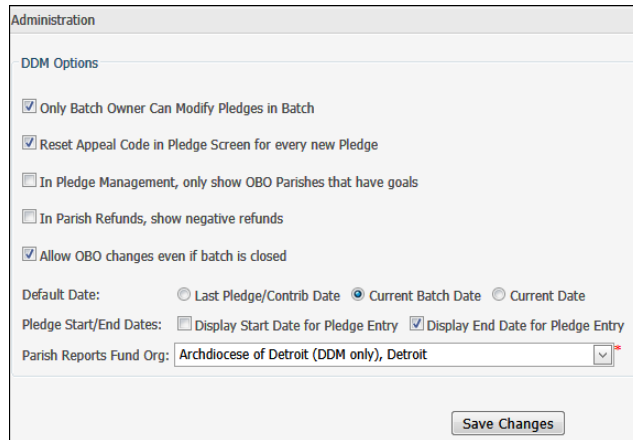
Administration (for System Administrators Only)

We transferred the DDM system options to the ConnectNow DDM application. These options are used to activate or deactivate features that apply to all of the funds you manage.

To configure the DDM system-wide settings, do the following:

1. Click  to display the **Administration** page.

System-wide DDM settings are displayed in the DDM Options section, as shown in the following illustration:



DDM Options

We added two date options for pledges:

- **Default Date** (select one):
 - ❖ **Last Pledge/Contrib Date:** use the date of the most recent pledge or contribution.
 - ❖ **Current Batch Date:** use the date of the current batch (recommended).
 - ❖ **Current Date:** use today's date.
- **Pledge Start/End Dates:** for pledge entry, select whether to display the start date only, the end date only, or both the start and end dates.

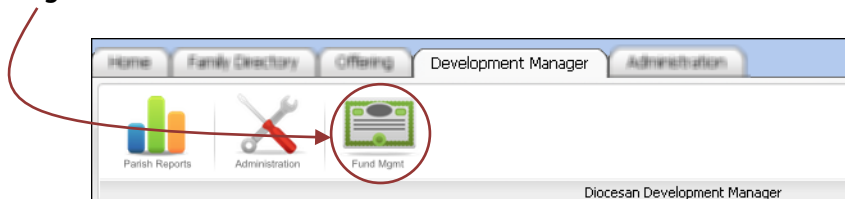
2. Select the desired options. Then, click  to save your selections.



Fund Management (for use by DDM Administrators Only)

- **DDM Fund Management Functions Transferred to the ConnectNow Web Application**

In accordance with our strategic move to browser-based applications, the DDM fund management functions were removed from the desktop application and transferred to the ConnectNow web application. To manage funds, select the **Development Manager** tab and then click the **Fund Mgmt** button:



- **NEW! Page Layout for Fund Management**

The ConnectNow DDM application renders the desktop **Fund Management** page into a new layout that is consistent with all other applications in the ConnectNow suite. The following illustration shows the layout and highlights the main functions of the **Fund Management** page:

The Organization list box displays the diocese as the default selection.

A dropdown list box displays all funds for the organization.

The **Add Fund** button is located at the top of the

In a future release, the **Funds Reports** button will provide quick access to the All Funds Report and Fund Master Report.

All of the Setup buttons are grouped together.

These three setup buttons are currently unavailable. We will activate them in a future release.

Change a fund's information by selecting a new value or by typing new information in the text box.

Designations Setup button lets you specify multiple designations for a pledge.

Delete Fund button allows a DDM administrator to delete a fund.

Main Features and Functions on the Fund Management Page

- **NEW! Designations Setup**

You can now enable givers to split pledges for a fund among different areas of need by specifying multiple designations. The following procedure shows you how to set up multiple designations for a fund.

1. On the **Fund Management** page, select whether you want to express the designations as a dollar amount or as a percent by selecting the desired button, as shown in the following illustration:



2. Click **Designations Setup** to display the **Designations Setup** window.
3. To specify designations, click **Add Designation**.

- In the **Designation** field, type a name for the designation. Then, in the **Code** field, enter a unique code for the designation.

Note

The asterisk (*) indicates that the information is required.

Designations Setup

Selected Fund : **Japan Relief (10024)**

Designation	Code	Active
No Pledge Designations Available.		

Page 1 of 0 (0 items) < >

Add Designation

Designation *

Code *

Pledge Active

Save Cancel

- If the pledge is active, check the **Pledge Active** box.

- Click to save the designation.

A giver will see each designation you specify for the fund in the **Pledge Designations** field on the **Pledge Details** tab in the DDM desktop application.

- Repeat Steps 3 – 6 for each designation you want to add.

- NEW! Set Fund Permissions Modal**

Click to view the new **Fund Permissions** modal, which displays a list of staff members with DDM Administrator or DDM User permissions. For example:

Fund Permissions

Selected Fund : **Japan Relief (10024)**

Can Access Fund	Staff Members
<input checked="" type="checkbox"/>	Admin, Diocesan (DDM Admin)
<input type="checkbox"/>	Armstrong, Pamela
<input checked="" type="checkbox"/>	Arsenault, Cathleen (DDM Admin)
<input checked="" type="checkbox"/>	Ashe, Fran
<input type="checkbox"/>	Atkinson, Lydia
<input type="checkbox"/>	Balfe, Meghan
<input type="checkbox"/>	Beers, Janice
<input type="checkbox"/>	Bibawi, Victor
<input checked="" type="checkbox"/>	Biskner, John
<input checked="" type="checkbox"/>	Biskner, Jonathan

Page 1 of 3 (28 items) < [1] 2 3 >

Save Cancel

You cannot change an administrator's fund permissions.

Note that DDM administrators have access to all funds. Therefore, you cannot remove their fund permissions (the checkboxes are grayed out). Check the box to the left of the member's name to permit fund access permission to individual DDM users. Then, click to save your selections.

- **NEW! Frequency Setup Modal**

We added the ability to configure the default frequency values for pledges when you create a new fund or edit an existing one. Specifically, you can configure the defaults for billing frequency, for the length of the pledge period, and for the way down payments toward the pledge total are handled.

Note

*The default values you define in the frequency setup map to data entry fields on the **Pledge Details** tab in the DDM desktop application.*

The following procedure shows you how to set up the frequency information for a fund.

1. In the fund details section for the selected fund, click Frequency Setup.

The **Frequency Setup** window is displayed. For example:

Selected Fund : Faithful Stewards (1234)

Frequency	Active	Default	Term (in months)	Down Payment Behavior*	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Annually	<input checked="" type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Semi-Annually	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Quarterly	<input checked="" type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bi-Monthly	<input checked="" type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Monthly	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Semi-Monthly	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bi-Weekly	<input checked="" type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Weekly	<input checked="" type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
One Time Gift	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
One Time	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Blank	<input type="checkbox"/>	<input type="radio"/>	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

*Check the checkbox for Down Payment Behavior if you want to count the down payment as the first installment.

Frequency Setup Window

2. Configure the default frequency options for the selected fund:
 - a) For each billing frequency that you want to make available for the fund, check the appropriate box in the **Active** column.
 For example, if you want to allow annual, quarterly and monthly billing, check the **Active** box to the right of each option listed in the **Frequency** column.
 - b) In the **Default** column, select the billing frequency that you want to use as the default selection.
 You can select only one billing frequency as the default. In the previous illustration, the selected default option is **Monthly**. This means that the monthly frequency will be selected by default when a new pledge is created.

- c) In the **Term** column, specify the default length of the fund’s pledge period in months. For example, if the pledge term is three years, enter 36 months.
- d) If the pledge accepts a down payment, the down payment can count as the term’s first installment (for example, as the pledge’s first annual or first quarterly payment). If you want the down payment to serve as the first installment, select the checkbox in the **Down Payment Behavior** column.

The application will calculate the amount of each of the remaining payments in the pledge term on the **Pledge Details** tab in the DDM desktop application. Following is the formula the application uses to determine the amount of the installment:

$$\text{Installment Amount} = \frac{\text{Total pledge amount (\$)} - \text{Down payment amount (\$)}}{\text{Term (in months)} - \text{Down Payment Behavior value}}$$

Based on this formula, a \$3600 pledge with a \$100 down payment that is billed monthly over a 36-month term has a monthly installment payment of \$100.

$$(\$3600 - \$100) / (36 - 1) = \$3500 / 35 = \$100$$

- e) For each frequency type you selected, check the boxes for the months you want to send pledge reminders and schedule electronic billing.

Note

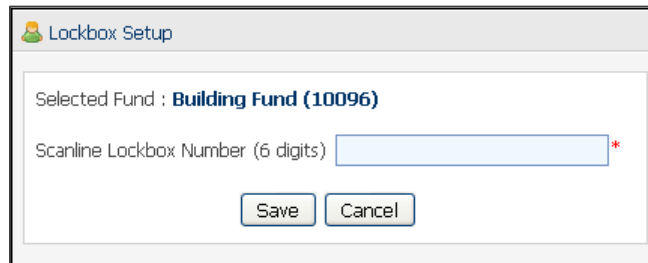
The checked boxes are the default values. You can change the default, if desired, by checking a different month for a given pledge record.

3. Click to save your selections.

- **NEW! Lockbox Setup Option**

When setting up the lockbox for a fund, you can now enter a scanline number. This number automates the processing of payments to a fund. Bank machines read the scanline number so that you do not need to manually enter payment information.

1. Click to display the **Lockbox Setup** for the fund, as show in the following illustration:



Lockbox Setup

2. In the **Scanline Lockbox Number** field, type the scanline number.

The scanline number you supply must have exactly six digits. Leading zeros are allowed. For example, the number 006743 is acceptable.

- **NEW! CN.DDM Reports Option**

We added the **Show this fund to parishes in CN.DDM Reports** option. Select this option if you want to display the fund in parish reports.

Designations for this fund are typically expressed as
 Dollar Amounts Percentages
Designations Setup

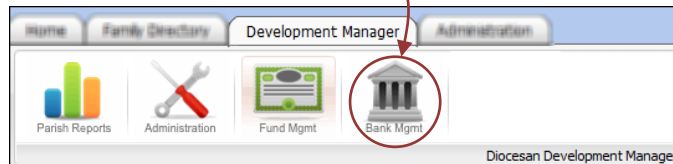
Show this fund to parishes in CN.DDM Reports
 This fund receives tax deductible gifts
 This fund has Shortfall payments for parishes that miss their goal
 This fund has Refunds for parishes that exceed their goal
Refund Percentage

Save Cancel Delete Fund



Bank Management

Fund bank accounts are now set up and managed entirely from the ConnectNow Development Manager tab under the **Bank Mgmt** button:



System Setup (for use by ParishSOFT Personnel Only)

Initial configuration of the DDM system is now performed entirely in the web-based ConnectNow DDM application. Only ParishSOFT personnel are permitted to use DDM system setup options.

DDM Desktop Application

- **Pledge Management Window Redesigned and Updated**

We redesigned the **Pledge Management** window. Several functions were removed, others moved to a different location, and new functions were added. The following illustration shows you the revised **Pledge Management** window. New and enhanced features are highlighted in yellow:

Current Batch list box contains all open batches.

NEW Notes tab replaces the **Notes** button.

Relocated the **Add New Pledge For Family** and **View All Pledges For Family** buttons.

NEW Secondary Acknowledgement field.

NEW Pledge Designations function.

Refresh All button clears the pledge data for a new entry and refreshes the batch list for open batches.

DELETE button deletes a pledge from an open batch.

NEW Pmt Type Details text entry field.

NEW Frequency list box. **NEW Pmt Type** list box. **NEW Fulfillment Method** list box.

Pledge Management Window

Following are descriptions of the major changes made to the **Pledge Management** window:

- ❖ **Current Batch:** contains a list of open batches. This list updates when you click the **Refresh All** button.
- ❖ **Notes:** displays a text-entry field where you can enter notes about the pledge.
- ❖ **Add New Pledge For Family** and **View All Pledges For Family** buttons were relocated.

- ❖ **Secondary Acknowledgment:** a text-entry field where you can acknowledge a group or an individual who did not make the pledge but played a significant role in its acquisition (for example, a company who gave a matching gift).
- ❖ **Pledge Designations:** enables you to split pledge amounts among multiple designations and even designate a portion of the pledge amount as unallocated.
- ❖ **Refresh All** button: clears the pledge data for a new entry and refreshes the batch list for open batches displayed in the **Current Batch** drop-down list.

Note

This button was previously named "Clear All".

- ❖ **DELETE** button: deletes a pledge from an open batch.
- ❖ **Pmt Type Details:** a text-entry field where you can add information about the payment.
- ❖ **Fulfillment Method** list box: lets you select the method by which the pledge is fulfilled; for example, paper statements, credit card, or debit card.
- ❖ **Frequency list box:** contains only those frequency default values configured for the selected fund.
- ❖ **NEW! Pmt Type (Payment Type)** list box: enables you to select the method used to handle the payment.

We revised the list of options to better align with standard fundraising and accounting practices (see the following table for descriptions of **Pmt Type** options). In addition, we created a shortcut code for each payment type (for example, CA for Cash) to increase the efficiency of data entry and data management.

Descriptions of Payment Type Options

Shortcut Code – Pmt Type	Description
CA – Cash (unspecified)	Cash (type unspecified). The cash category is expanded in this release to include other options for cash payments (see entries that follow in this table).
CU – Currency	Cash in the form of a specific currency (for example, 100-dollar bill).
CK – Check	Cash in the form of a bank check.
CC – Credit Card (unspecified)	(Replaces the Credit category in previous releases). Credit Card (type unspecified). The Credit Card category is expanded in this release to include specific types of credit cards (see entries that follow in this table).
VI – Visa	Visa

Descriptions of Payment Type Options (continued)

Shortcut Code – Pmt Type	Description
MC – Mastercard	MasterCard
AX – American Express	American Express
DS – Discover	Discover card
DD – Direct Debit	Cash in the form of a debit transaction from a donor’s bank account.
CIP – Customer Initiated Payment	Donor-initiated cash payment (for example, a bank check) or the transfer of funds from a bank account.
SEC – Stocks and Securities	(Replaces the Stock gift in previous releases); includes financial investments such as stocks, bonds and mutual funds.
MAT – Matching Gifts	A specialized type of soft credit, whereby the donor’s company or foundation matches the donor’s gift.
SC – Soft Credit	A non-tax-deductible credit for a gift received.
GK – Gift in Kind	Non-monetary gift; for example, food, clothing, volunteer hours, prayers, participation in an activity.
SP – Spiritual	A specialized type of Gift in Kind; for example, a prayer for a bishop, pastor, or fundraising campaign.
OTH – Other	Use this category to track gifts for which no other purpose category is listed.

- **Lockbox File Enhanced**

- ❖ We added a new format that enables pledge processing for multi-year campaigns. We added two frequency options: **Annual** and **Semi-annual**.
- ❖ We modified all import formats to correctly use the new **Payment Type** options in DDM.
- ❖ We improved all pledge formats to round up the installment amount for a new pledge.
- ❖ For example, a \$1,000 pledge with a three-month payment term now results in a \$333.34 installment amount instead of \$333.33333333 in the database and \$333.33 on statements. This change improves the accuracy of the data and also eliminates situations in which a donor still owes a few pennies at the end of a pledge.
- ❖ We added a pledge format that can explicitly capture the term length and installment amount.

- **Lockbox Credit Card Validation**

- ❖ For Lockbox processing, we implemented basic validations of credit card numbers. Credit cards numbers are validated using the same rules as those used in the user interface to configure bank accounts.
- ❖ “Unknown Bank” is no longer displayed in the **Bank Name** field.

- **Login Enhancements**

- ❖ We made minor refinements to the user interface. These changes slightly improve login speed.
- ❖ We fixed an issue that caused administrative accounts to be repeatedly created even if the accounts already existed.

- **Pledge Adjustments Report**

You can now filter the Pledge Adjustments report by fund.

- **Lifetime Giving Button**

The **Lifetime Giving** button is now functional again for those who have DDM privileges.

- **EOY Statements**

We made minor changes to custom EOY reports so that they handle **Address Line 2**. We removed the memo text associated with each contribution on some custom EOY reports.

- **Lockbox Contribution Report**

We made changes to the format and layout of this report so that it is easier to navigate through it and locate information.

- **Posting Overpayments**

We removed old programming that caused text to be placed in the **Pledge Notes** field when an overpayment was made. Now, if an overpayment is made, notes regarding it are written in the **Pledge Adjustment Details** table only.

- **Pledge Designations**

- ❖ **New!** Funds Having Pledge Designations Can Now Include Non-Designated Amounts

Funds that allow pledge designations now accept a non-designated (unallocated) dollar amount or a non-designated (unallocated) percent portion.

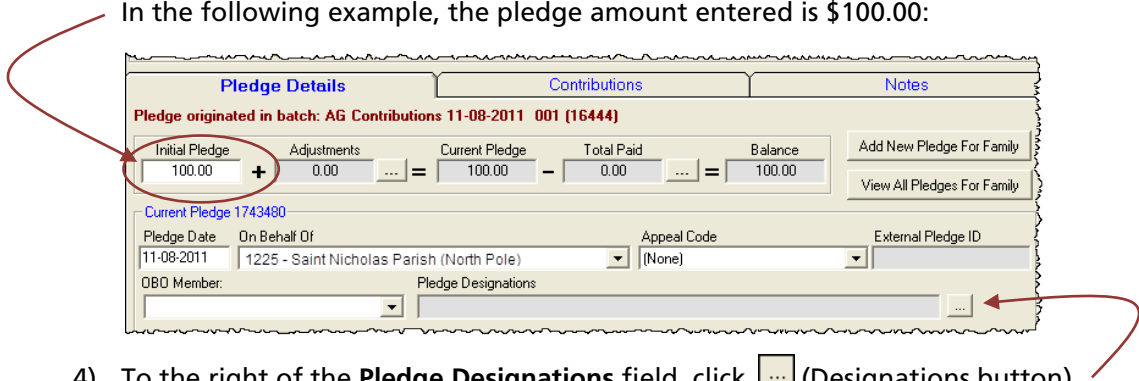
Note

A fund's pledge designations are set up on the Fund Management page in the CN.DDM application.

The following procedure shows you how to specify a portion of a pledge as unallocated.

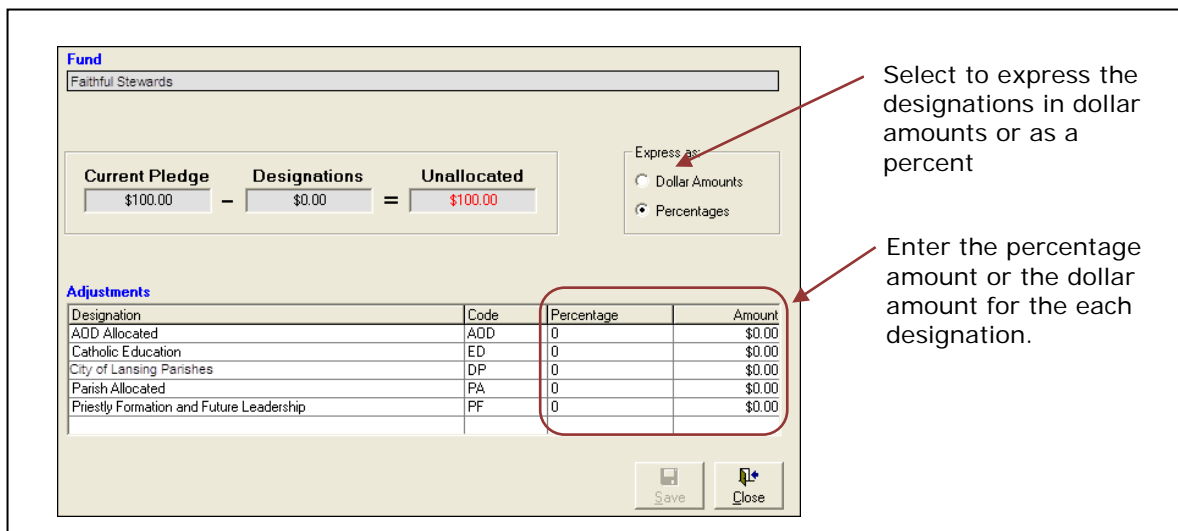
- 1) On the **Pledge Details** tab, select the organization, the fund, and the current batch.
- 2) Select the family and an organization from the **On Behalf Of** list.
- 3) Enter a pledge amount in the **Initial Pledge** field.

In the following example, the pledge amount entered is \$100.00:



- 4) To the right of the **Pledge Designations** field, click **...** (Designations button).

The **Pledge Designations** screen is displayed. The pledge designations for the selected fund are listed at the bottom of the screen:



Pledge Designations

- 5) In the **Express as** section, select one of these options:
 - **Dollar amounts:** expresses the designation in actual dollar amounts.
 - **Percentages:** expresses the designation as a percent of the total pledge.
- 6) Depending on the **Express as** option you selected in Step 5, in the **Adjustments** section, specify the actual percent or dollar amount for each designation.

As shown in the illustration below, the allocations do not have to total 100% (in the case of percentages) or the full amount of the pledge (in the case of dollar amounts). Any remaining amount is identified as “unallocated”.

Note

Allocations cannot exceed 100% or the total dollar amount of the pledge.

Any remaining amount is identified as “unallocated”.

Specify a percentage or dollar amount for each designation.

Designation	Code	Percentage	Amount
ADD Allocated	ADD	5	\$5.00
Catholic Education	ED	15	\$15.00
City of Detroit Parishes	DP	10	\$10.00
Parish Allocated	PA	45	\$45.00
Priestly Formation and Future Leadership	PF	0	\$0.00

- 7) Click Save. Then, click Close to exit.

- 8) Click Yes to save your changes to the database.

❖ **Tooltips Added**

To improve usability, we added tooltips to describe the buttons and fields on this tab.

- ❖ We resolved an issue that caused the value in certain fields to change when the Tab key was used to navigate from one field to the next.

Suite Prior Versions

You can view release notes for prior versions by clicking the links in the table below:

Version Number	Click This Link
3.7.22	http://www.parishsoft.com/updates/psreleasenotes3722.pdf
3.7.20	http://www.parishsoft.com/updates/psreleasenotes3720.htm
3.7.19	http://www.parishsoft.com/updates/3719_ReleaseNotes.pdf
3.7.18	http://www.parishsoft.com/updates/3718_ReleaseNotes.pdf
3.6.22 - 3.7.17	http://www.parishsoft.com/updates/psreleasenotes3717.htm