



VERSION 4.4.5 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.5 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

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System-Wide

Updates and Enhancements

Login Process Simplified After an Expired Browser Session

We removed the extra step required to log back in after an expired session. Previously, the system took you to a new page where you were informed that your session had expired and prompted to click a button to display the Login page. Now, the system takes you directly to the Login page. After you log back in, the system displays the same page you were working on before your browser session expired so you can resume your work.







IMPORTANT REMINDER

For security reasons, the system logs you off if you have been inactive for 30 minutes. The automatic logoff feature provides an important layer of security designed to minimize the exposure of your ParishSOFT data to theft and misuse. The 30-minute timeout is within the recommended interval for web applications.

Resolved Issues

Email Now Transmits Successfully from Gmail Accounts

Some users experienced an error when attempting to send email from Gmail accounts from within ParishSOFT Family Suite. If you receive an error, try this solution:

1. Open your Gmail application.
2. In the upper-right, click this button: . Then, click  to open the **Google Account** page.
3. In the **Sign in & security** section in the left panel, select the **Signing in to Google** option.
4. Do the following:
 - a) In **Password & sign-in method** section in the right panel, select **2-Step Verification**.
 - b) When prompted to verify your identity, type your password into the password field, and then click .
 - c) If the **2-Step Verification** option is set to **ON**, click  to disable it.
The system returns you to the **Sign-in & security** page.
5. In the **Sign in & security** section in the left panel, select the **Apps with account access** option.
6. Scroll to the bottom of the right panel and set the **Allow less secure apps** option to **ON**, as shown in the following illustration:



Mobile Site

Resolved Issues

[Ability to Complete New User Registration from an Apple Device Resolved](#)

Previously after logging in for the first time, users accessing the mobile site using an iPad or iPhone could not view and respond to the **Terms of Use** message, so they could not complete the **New User Registration** process. We fixed this issue. Users can now successfully complete the registration process on Apple devices by viewing and accepting the terms of use.

ParishSOFT Family Suite

Family Directory

Updates and Enhancements

Sacrament Functionality

The ability to show and hide sacrament data is a new diocesan feature added in this release of ParishSOFT Family Suite (for details, see [“Option Added to Enable Diocesan Administrators to Show and Hide Sacraments”](#)).

The new Show/Hide diocesan-level feature brought many changes to the Sacrament functionality in Family Directory. Those changes are described in detail below:

- In the **Sacraments** module:
 - ❖ On the **Add/Edit Sacraments** page, the visibility of certain sacraments in the **Sacraments** dropdown list may now be restricted, specifically:
 - If your diocese hides a specific sacrament, the sacrament does not appear in the dropdown list.
 - If your diocese hides all sacraments, the dropdown list itself is not shown.
 - If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the dropdown list. If the entire list was removed, it is reshown after visibility of any individual sacrament is enabled.
 - ❖ On the **Group Sacrament Entry** page, the visibility of certain sacraments in the **Sacraments to Update** dropdown list may now be restricted, specifically:
 - If your diocese hides a specific sacrament, the sacrament does not appear in the dropdown list.
 - If your diocese hides all sacraments, the dropdown list itself is not visible.
 - If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the dropdown list. If the entire list was removed, it is reshown after visibility of any individual sacrament is enabled.
- In the **Reports** module:

In the **Sacraments** menu, the visibility of certain sacraments may now be restricted, specifically:

 - ❖ If your diocese hides a specific sacrament, the sacrament does not appear in the menu.
 - ❖ If your diocese hides all sacraments, the menu itself is not visible.
 - ❖ If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the menu. If the entire menu was removed, it is reshown after visibility of any individual sacrament is enabled.

- **In Member Details:**

On the **Sacraments** tab in a member's profile, the visibility of certain sacrament data may now be restricted, specifically:

- ❖ If your diocese hides a specific sacrament, that sacrament's data does not appear on the tab.
- ❖ If your diocese hides all sacraments, the tab itself is not shown.
- ❖ If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the tab. If the entire tab was removed, it is reshown after visibility of any individual sacrament is enabled.

- **In Mail Merge:**

The availability of certain templates in the **ParishSOFT Templates** group may be restricted, specifically:

- ❖ If your diocese hides a specific sacrament, a mail merge template for the sacrament is not listed in the group.
- ❖ If your diocese removes the restriction to hide a sacrament, the system adds that sacrament's template back to the group.

Resolved Issues

Family Details

Members Denied Addition to a Family in Suspense Review No Longer Added to Family Record

Previously after a family's record was moved to a different organization, a member whose addition to the family was denied during Suspense Review incorrectly appeared in the transferred record on a blank **Member Details** tab. We fixed this issue.

Member List

Search Capability of the Member List Improved

Previously, **Member List** searches did not respond to ongoing changes in the user's search criteria. We improved the search capability. Now, when the user changes criteria, the system immediately updates the results to match currently entered search values.

User-Defined Filter Values Now Working on Member List Page

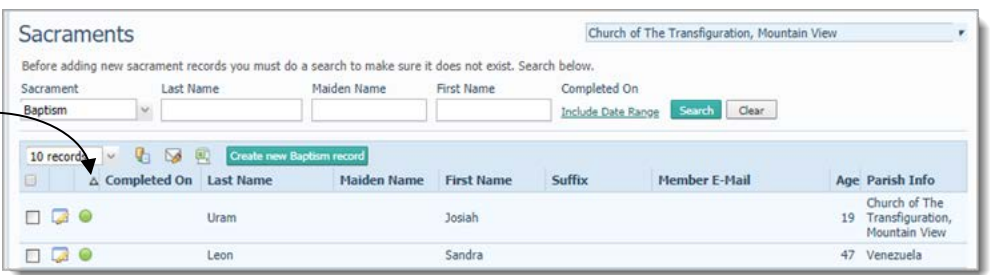
Previously after the user saved filter values as defaults, the default values were not applied—as expected—after the user exited and then returned to the **Member List** page. We fixed this issue. User-defined filter values now remain in effect on the page after the user saves them.

Sacraments

Exception Error Experienced When Attempting to Sort Sacrament Search Results Resolved

The ability to sort the **Sacraments** search grid is now working as expected. Previously, clicking the Status column header produced an Exception error.

You can now successfully apply the **Status** column filter to the **Sacrament** search grid.



Completed On	Last Name	Maiden Name	First Name	Suffix	Member E-Mail	Age	Parish Info
	Uram		Josiah			19	Church of The Transfiguration, Mountain View
	Leon		Sandra			47	Venezuela

Religious Education

Updates and Enhancements

Mail Merge

Availability of Certain ParishSOFT Sacraments Templates May Be Restricted

The ability to hide and show sacrament data is a new diocesan feature added in this release of ParishSOFT Family Suite (for details, see "[Option Added to Enable Diocesan Administrators to Show and Hide Sacraments](#)"). Be aware of the following:

- If your diocese hides a specific sacrament, a mail merge template for that sacrament is not included in the **ParishSOFT Templates** group.
- If your diocese removes the restriction to hide a sacrament, the system adds the sacrament's template back to the **ParishSOFT Templates** group.

Classes

Visibility of Certain Sacrament Data on the Sacraments Tab May Now Be Restricted

The ability to hide and show sacrament data is a new diocesan feature added in this release of ParishSOFT Family Suite (for details, see "[Option Added to Enable Diocesan Administrators to Show and Hide Sacraments](#)"). Be aware of the following:

- If your diocese hides a specific sacrament, that sacrament's data does not appear on the **Sacraments** tab on the **Classes** page.
- If your diocese chooses to hide all sacraments, the **Sacraments** tab is not visible.
- If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the **Sacraments** tab. If the tab itself was removed, it is reshowed after visibility of any individual sacrament is enabled.

Visibility of Certain Sacrament Data in the Sacraments Quick List Report May Now Be Restricted

The ability to hide and show sacrament data is a new diocesan feature added in this release of ParishSOFT Family Suite (for details, see "[Option Added to Enable Diocesan Administrators to Show and Hide Sacraments](#)"). Be aware of the following:

- If your diocese hides a specific sacrament, that sacrament does not appear in the **Sacraments** quick list report (available from the **List of Quick Reports** menu on the **Classes** page).
- If your diocese removes the restriction to hide a sacrament, the system the sacrament back to the report.

Reports

Visibility of Sacrament Data in the Sacraments List Report May Now Be Restricted

The ability to hide and show sacrament data is a new diocesan feature added in this release of ParishSOFT Family Suite (for details, see "[Option Added to Enable Diocesan Administrators to Show and Hide Sacraments](#)"). Be aware of the following:

- If your diocese hides a specific sacrament, that sacrament does not appear in the **Sacraments** list report, available from the **Religious Education Reports** menu.
- If your diocese removes the restriction to hide a sacrament, the system adds the name of the sacrament back to the report.

Offering

Resolved Issues

Pledges

Edits to Pledge Amount No Longer Results in an Overpayment Adjustment

Previously, when the user edited a pledge amount that was associated with a “pledge required” fund, the system incorrectly processed the edited amount as a new payment, which—depending on the amount—sometimes resulted in an overpayment adjustment. We fixed this issue.

Reports

Timeout Error Now Redirects Users to the Correct Page

Previously on the **Contributions > Posting** page if users clicked the **View Report** button during an expired session, the system redirected them to the wrong page. We fixed this issue. If users click the View Report button after a session expires, they are redirected to the **Welcome – Log In** page where this explanatory message is displayed:

Your browser session expired.

At this point, users can re-enter their login credentials to log back in to the application. Users return to the same page they were working on when the session expired.

Tuition

Resolved Issues

Reports

Zero Balance Filter Now Working As Expected

For Tuition statements, we resolved an issue that caused the system to not detect the state (selected or not selected) of the **Zero** balance filter if the family had another outstanding invoice. The filter is now working, specifically:

- When the **Zero** balance filter is selected, the system generates a list of statements having a \$0.00 balance during the specified date range.
- When the **Zero** balance filter is not selected, the system generates a list of statements having a remaining balance during the specified date range.

Outstanding Balance Filter Now Working As Expected

Previously if only the **Outstanding** balance filter was selected in the Tuition statement setup, the system sometimes generated statements for invoices that were paid in full. The filter is now working correctly. Now, if only the **Outstanding** balance filter is selected, only invoices with outstanding balances during the specified date range are generated.

Resolved Issues

[Pledge Date Field No Longer Causes Query Execution Error](#)

We resolved an issue that caused the user to experience an execution error whenever a **Pledge Date** field was included as a result column in a query.

[Address Verification Process Now Stores Correct Zip Code in All Database Tables](#)

Previously, the address verification process used in My Own Church and Family Directory did not update all internal address tables with the zip code validated and saved as the correct alternative. As a result, queries using those tables as a data source returned the wrong zip codes. We fixed this issue. The system now saves the correct zip code to all address tables in the database.

Administration

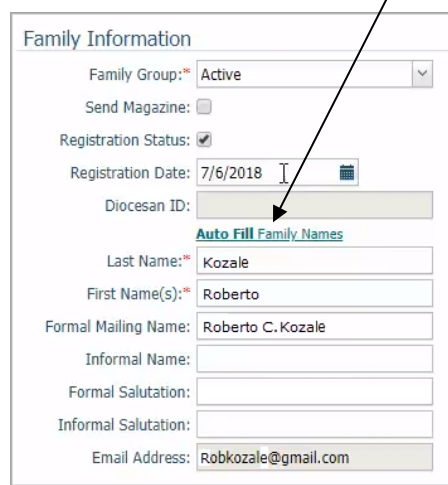
Resolved Issues

Suspense

User Registrations

Auto-Filled Information in Name Field Corrected

Previously during the new user registration process, the system carried over names from the previously viewed record and inserted them into the name fields on the **Family Information** form. This behavior was confusing to users. To prevent future confusion, name fields on the form remain blank. The fields are automatically filled only after the user clicks the [Auto Fill Family Names](#) link.



The screenshot shows a web form titled "Family Information". The form contains several fields: "Family Group:" with a dropdown menu set to "Active"; "Send Magazine:" with an unchecked checkbox; "Registration Status:" with a checked checkbox; "Registration Date:" with a date field set to "7/6/2018" and a calendar icon; "Diocesan ID:" with a blank text field; "Last Name:" with a text field containing "Kozale"; "First Name(s):" with a text field containing "Roberto"; "Formal Mailing Name:" with a text field containing "Roberto C. Kozale"; "Informal Name:" with a blank text field; "Formal Salutation:" with a blank text field; "Informal Salutation:" with a blank text field; and "Email Address:" with a text field containing "Robkozale@gmail.com". A blue link labeled "Auto Fill Family Names" is positioned below the "Diocesan ID" field. A black arrow points from the text in the paragraph above to this link.

Family Directory Updates

Notification Process Modified

Previously if a family updated their record, all parishes the family was associated with received a notification about the update. We modified this process. Now, update notifications are sent only to the organization the family is registered to.

ParishSOFT Diocesan Suite

Administration

Updates and Enhancements

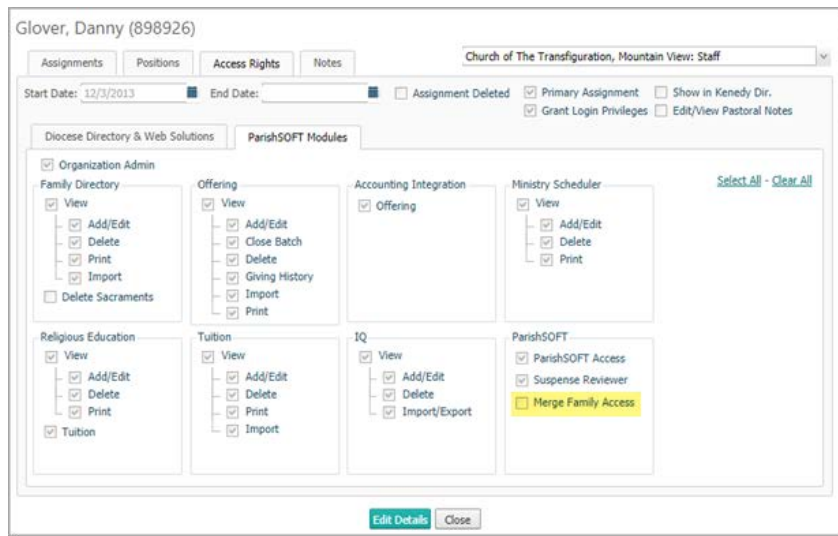
Manage Staff

'Merge Family Access' Option Added to the Staff Record

As shown in the illustration below, a new permission option, labelled **Merge Family Access**, was added to the **ParishSOFT Modules** tab in the staff record. This option enables parish administrators in a diocese that has the global **Merge Family Access** permission activated to grant specific staff in their organizations permission to merge family records.

Note

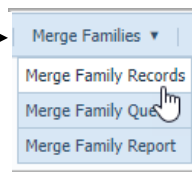
*The **Merge Family Access** permission option, shown below, has limited visibility. It can be seen by all users with Diocesan Admin access but only by parish administrators who have an active assignment to the selected organization and in a diocese that has the global **Merge Families Access** permission activated. For details on activating this global permission, see "[Option Added to Enable Diocesan Administrators to Give Parish Administrators Permission to Merge Family Records.](#)"*



In the staff record, the **Merge Family Access** option is disabled by default. In the disabled state, the staff user cannot see the **Merge Families** menu in the **Administration** module. After the option is enabled, the staff user can see the **Merge Families** menu (see illustration below) and access its features and processes.

This menu is visible only to staff users that have the **Merge Families Access** option enabled in their staff records.

Options on this menu enable staff to merge family records and perform other tasks associated with merges.

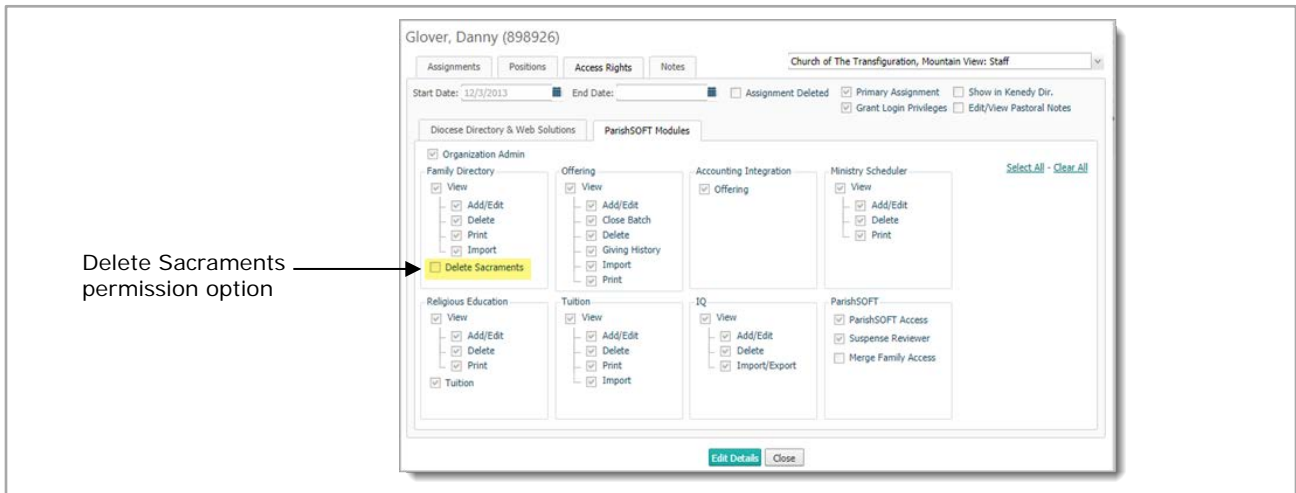


'Delete Sacraments' Permission Option Added to the Staff Record

As shown in the following illustration, a new permission option, labelled **Delete Sacraments**, was added to the staff record on the **ParishSOFT Modules** tab. This option enables parish administrators in a diocese that has the global **Delete Sacrament** permission activated the ability to grant specific staff permission to delete sacrament records.

Note

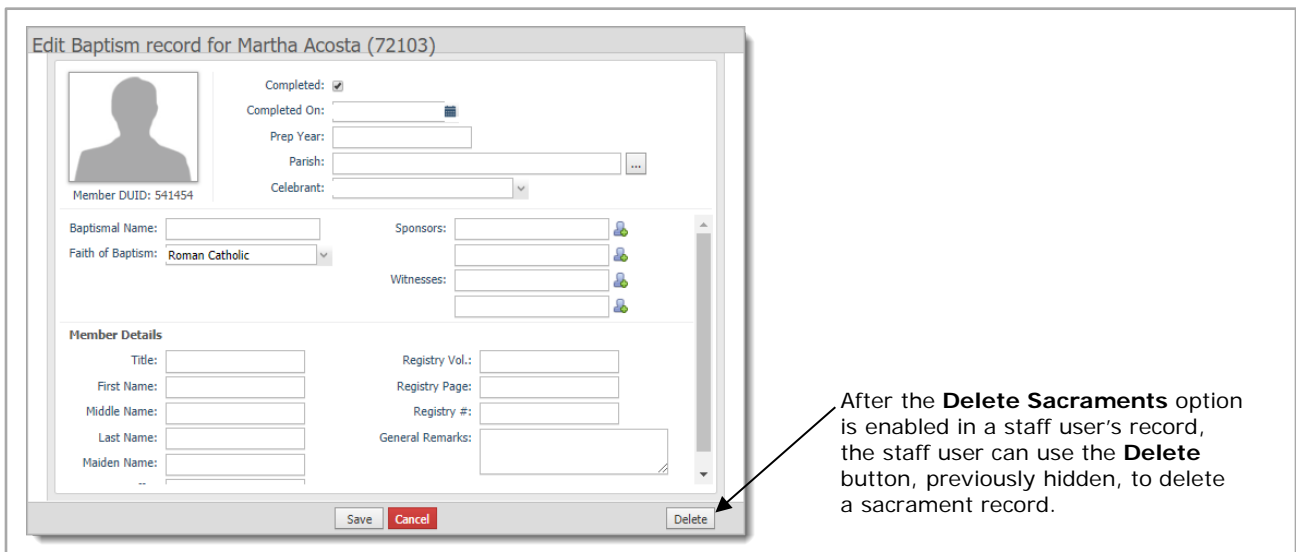
*In the staff record, the **Delete Sacraments** permission option has limited visibility. It can be seen by all users with Diocesan Admin access but only by parish administrators with an active assignment to the selected organization and in a diocese that has globally enabled the **Delete Sacrament** permission. For details on activating this global permission, see ["Option Added to Enable Diocesan Administrators to Give Parish Administrators Permission to Delete Sacrament Records."](#)*



By default, the **Delete Sacraments** option is disabled. Enabling the option allows the selected staff user to delete sacrament records in the organization he or she has an active assignment to. The **Delete** button, which was previously hidden, is now active and visible to the staff user (see illustration below).

Note

*The **Delete** button, shown in the lower-right, is active and visible only when a sacrament record is in edit mode.*



Be aware that the system maintains an internal log to document these details whenever a sacrament record is deleted:

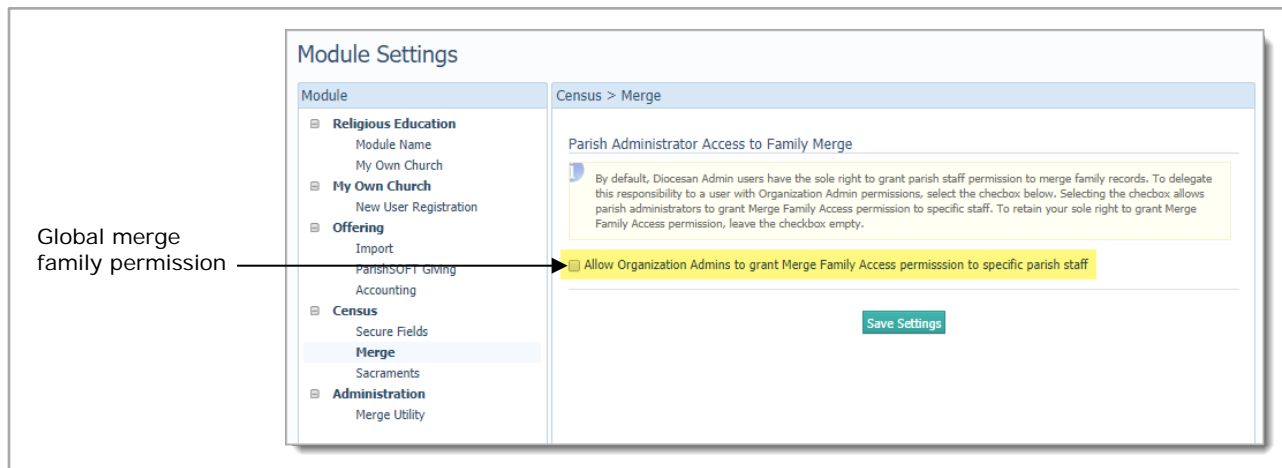
- Date and time of the deletion
- Username of the user who deleted the sacrament
- First name and last name of the user who deleted the sacrament
- Type of sacrament deleted (for example, Baptism)
- Member DUID and Family DUID of the record associated with the deleted sacrament.

Module Settings

Option Added to Enable Diocesan Administrators to Give Parish Administrators Permission to Merge Family Records

As a diocesan administrator, you have the sole right to merge the records of families in your diocese. If desired, you can now delegate this right to parish administrators to allow them to grant specific staff within their organizations—including themselves—permission to merge family records.

As shown in the following illustration, the **Census > Merge** page features a global permission option that enables you to allow parish administrators within your diocese to grant family merge permission to specific staff in their respective organizations. By default, the option is disabled.



To allow parish administrators within your diocese to grant merge permission to specific staff, select this checkbox: **Allow Organization Admins to grant Merge Family Access permission to specific parish staff**. Then, click **Save Settings**.

With the option enabled, parish administrators in your diocese can now give specific staff **Merge Family Access** permission to allow them to merge family records.

Note

Merge Family Access permission must be enabled within each selected staff user's record (for details, see ["Merge Family Access Option Added to the Staff Record"](#)).

Option Added to Enable Diocesan Administrators to Show and Hide Sacraments

To assist diocesan administrators with the task of managing sacrament data, we added global options to enable them to control which sacraments organizations can see and, therefore, modify sacrament data.

The **Census > Sacraments** page, shown in the illustration below, provides checkbox controls that give diocesan administrators a way to select which sacraments they want to hide (or show). Note that, by default, the checkbox next to each sacrament is selected, which means that the sacrament is visible, and its data can be modified.

The screenshot shows the 'Module Settings' interface for 'Census > Sacraments'. On the left is a navigation menu with categories: Religious Education, My Own Church, Offering, Census, Sacraments (highlighted), and Administration. The main content area is titled 'Show/Hide Sacraments' and contains a yellow instruction box: 'Use the checkboxes below to indicate which sacraments to show and hide in all organizations within your diocese. To show a sacrament, select its checkbox. To hide a sacrament, clear its checkbox.' Below this are two columns of checkboxes, all of which are checked: Baptism, Reconciliation Prep, First Eucharist, Confirmation, Marriage, Anointing of the Sick, Holy Orders, Funeral, Rite of Reception, and Religious Profession. Below the checkboxes is a 'Delete Sacraments' section with another yellow instruction box: 'By default, Diocesan Admin users have the sole right to grant parish staff permission to delete sacrament records. To delegate this responsibility to Organization Admin users, select the checkbox below. Selecting the checkbox allows a user with Organization Admin permission to grant Delete Sacrament permission to specific staff. To retain your sole right to grant Delete Sacrament permission, leave the checkbox empty.' Below this is a checkbox labeled 'Allow Organization Admins to grant Delete Sacrament permission to specific parish staff'. At the bottom right is a green 'Save Settings' button.

To hide a specific sacrament, simply clear its checkbox, and then click [Save Settings](#) to submit the change.

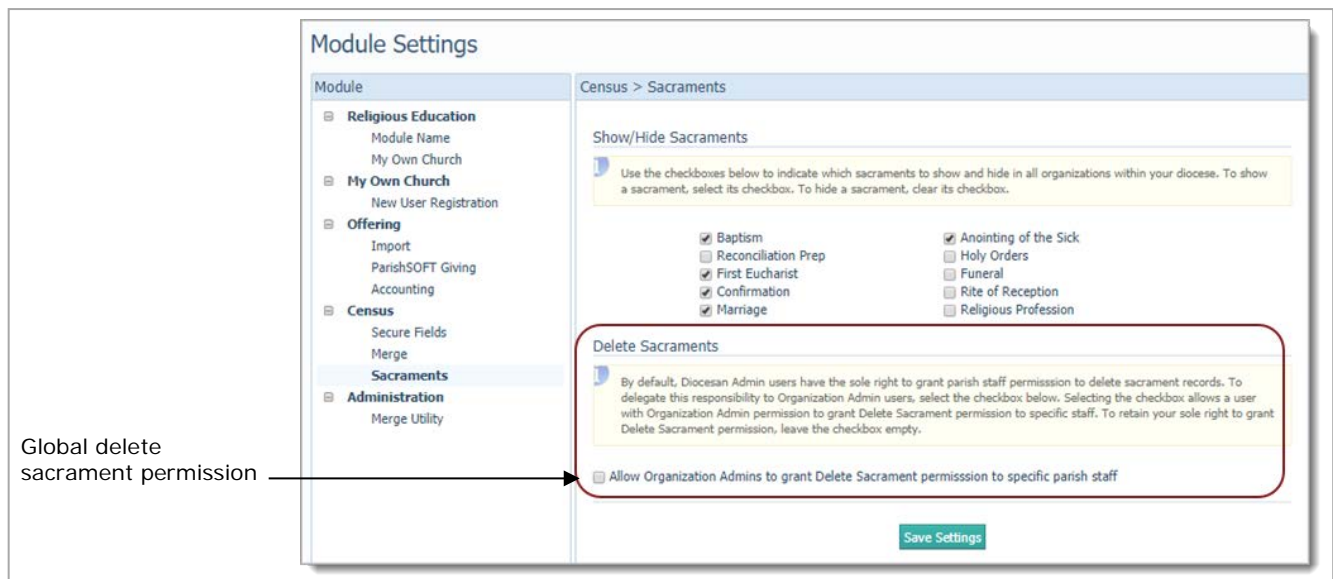
For any sacrament that you select to hide, the system does the following:

- In the Family Directory module:
 - ❖ Removes the sacrament from the **Sacraments** tab in **Member Details** to prevent users in all organizations from viewing its details. If all sacraments are hidden, the tab itself is not displayed.
 - ❖ Removes the sacrament from the **Reports > Sacraments** menu.
 - ❖ Removes the sacrament from the **Sacraments** dropdown list on the **Add/Edit Sacraments** page to prevent users in all organizations from adding new sacrament records and editing existing ones.
 - ❖ Removes the sacrament from the **Sacrament to Update** dropdown list on the **Group Sacrament Entry** page to prevent users in all organizations from adding or viewing entries for the sacrament.
 - ❖ Removes the sacrament template from the **ParishSOFT Templates** group in Mail Merge.
- In the Religious Education module:
 - ❖ Removes the sacrament from the **Sacraments** tab on the **Classes** page to prevent users in all organizations from viewing students' sacrament data. If all sacraments are hidden, the tab itself is not displayed.
 - ❖ Removes the sacrament from the **Sacraments List** quick report.
 - ❖ Removes the sacrament template from the **ParishSOFT Templates** group in Mail Merge.

Option Added to Enable Diocesan Administrators to Give Parish Administrators Permission to Delete Sacrament Records

To maintain control over sacrament records, diocesan administrators, by default, have the sole right to delete sacrament records and to grant deletion rights to other users within the diocese. In this release, we added a global option that enables diocesan administrators to give parish administrators the ability to grant staff in their respective organizations—including themselves—permission to delete sacrament records.

As shown in the following illustration, the **Census > Sacraments** page features a global option that enables you to allow parish administrators to grant delete sacrament permission to specific staff in their organizations. By default, the option is disabled.



To allow parish administrators within your diocese to grant delete sacrament permission to specific staff, select this checkbox: **Allow Organization Admins to grant Delete Sacrament permission to specific parish staff**. Then, click **Save Settings**.

With the option enabled, parish administrators in your diocese can now grant delete sacrament permission to specific staff.

Note

Delete sacrament permission must be enabled within each selected staff user's record (for details, see "['Delete Sacraments' Permission Option Added to the Staff Record](#)").

Be aware that the system maintains an internal log to document these details whenever a sacrament is deleted:

- Date and time of the deletion
- Username of the user who deleted the sacrament
- First name and last name of the user who deleted the sacrament
- Type of sacrament deleted (for example, Baptism)
- Member DUID and Family DUID of the record associated with the deleted sacrament.

Merge Families

Restrictions Imposed on Merge Operation

To prevent errors and protect data, the following restrictions were added to control family merges:

Note

The following restrictions do not apply to users with Diocesan Admin access rights with Grant Login Privileges enabled on an active assignment. These users are permitted to merge any record in their diocese database.

Likewise, users belonging to an organization whose diocese does not use ParishSOFT Family Suite are not bound by the following restrictions. These users can merge any family record in their organization's data.

- Parishes can merge only family records that are:

- ❖ Associated with their organization

AND

- ❖ Owned by their organization

Such family records are visible to the parish throughout ParishSOFT Family Suite (for example, in family and member lists).

- A merge does not remove a family's record from other organizations the family is affiliated with. After a merge, the duplicate family's associations to other organizations are maintained and transferred to the permanent family's record.
- In most circumstances, organization-specific data in the duplicate family's record that is stored by any affiliated organizations in the following fields is retained and transferred to the permanent record during a merge:
 - ❖ **Family Group**
 - ❖ **Envelope #**
 - ❖ **Informal Name**
 - ❖ **Informal Salutation,**
 - ❖ **Send Mail**
 - ❖ **Send Contrib. Env**
 - ❖ **Member Status**
 - ❖ **Member Notes**

An exception to this rule applies whenever both families in a merge are associated with an organization that does not own their records. In this rare circumstance, the merge process gives higher priority to the permanent family's data. In other words, the permanent family's organization-specific data in these fields is retained, and the duplicate family's data is not.

- The merge process sends notification about the merge to all organizations the duplicate family is affiliated with.

Reports

Access Rights Export Updated to Include Columns for New Permissions

The Access Rights Export was updated to include columns for the new **Delete Sacraments** and **Merge Family Access** permissions, added to the staff record in this release. The columns respectively record which users have the Delete and Merge permission granted or denied in their staff records:

Note

An X in the column indicates that the permission is granted. An empty column indicates that the permission is denied.

- **Delete Sacraments** (in the report, this column was added to the **ParishSOFT Module Permissions** group in the **Family Directory** section). For details on the new Delete Sacraments option, see [Delete Sacraments' Permission Option Added to the Staff Record](#).
- **Merge Family Access** (in the report, this column was added to the **ParishSOFT Module Permissions** group in the **ParishSOFT** section). For details on the new Merge Family Access option, see [Merge Family Access' Permission Option Added to the Staff Record](#).

Resolved Issues

Manage Staff

System Now Retains User's Organization Selection

Previously during the process of adding a new staff assignment, the system did not retain the organization selected by some users long enough to allow them to click the **Accept** button. We fixed this issue.

Staff Users with Assignment End Dates in the Future No Longer Locked Out of Family Suite

We resolved an issue that prevented staff users whose assignment end dates were in the future from being able to access Family Suite. Staff access is now prevented only when the end date of the assignment is reached.

Merge Families

Merge Process No Longer Changed Ownership of Duplicate Family's Ministry Records

Previously after a merge, ownership of the duplicate record's ministry records was incorrectly changed to the organization that owned the master record. As a result, the parish that owned the duplicate record no longer had access to the duplicate family's ministry information. We fixed this issue. Additionally, we corrected any records affected by this issue to change ownership of the ministry records back to the original organization.

Sacrament Merge Conflict Window No Longer Contains Incorrect Dates

Previously in the window displayed to allow users to review sacrament merge conflicts, sacraments completed prior to January 1, 1970 showed completion dates that were not correct. We fixed this issue. All dates shown in the **Date Completed** field are now correct.

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)