



VERSION 4.5.3 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.5.3 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

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ParishSOFT Family Suite

What's New

Family Directory

Process of Moving a Member to a New Family Now Automated

Notes

You must have Family Directory View + Add/Edit permissions to perform this task.

This process is especially handy when you need to create a new family record for a divorced family member or an adult member who moves into his or her own residence.

Previously when moving a member's record from one family to a new family, you first had to create a new family record for the member being moved, then add the member to the newly created record, and finally delete the member from the original family record. This new feature automates the entire process, enabling you to save time.

The following steps show you how to move a member from an existing family to a new family record:

1. On the **Family List** page, open the family record of the member you want to move.
2. Click the **Member Details** tab. Then, select the tab of the member you are moving.
3. Click  to put the record in Edit mode. Then at the bottom of the **Family Details** tab, click **Export to New Family**.

A message asking you whether the new record should use the existing family's address is displayed.

4. Click **Yes** or **No** to the prompt.

The **Add New Family** page is displayed. This page is populated with information from the member's tab in **Member Details**.

5. Review the details in the newly created record. Then, do one of the following:
 - If necessary, edit the record. Then, save your changes using one of the **Save** button options.
 - If information in the record is accurate, save it using one of the **Save** button options.

The system does the following:

- Removes the member from the original family and creates a new family record with its own Family DUID.
- Assigns the parish that made the move as owner of the new family record.
- On the **Family Details** tab in both the original and new family records, documents the move in the **Notes** section.
- Notifies the parish of registration about the move. (Other parishes to which the original family is associated with do not receive notification.)

IQ

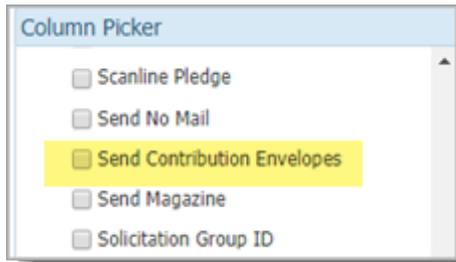
'Send Contribution Envelopes' Column Added to the Members Group in Column Picker

In **Member Details**, the **Send?** checkbox field, shown below, is used to indicate whether a member wants to receive contribution envelopes.



Marital Status:
 Envelope #: [Next](#) Send?

To enable you to design queries that pull data from this checkbox field, we added the **Send Contribution Envelopes** column, shown below, to the **Members** group in the **Column Picker**:



Column Picker

- Scanline Pledge
- Send No Mail
- Send Contribution Envelopes
- Send Magazine
- Solicitation Group ID

Results of queries that include this column are shown under the column heading in the **Query Results** panel. If desired, you can export results to a **.csv** file and use them as a data source for mail merges.

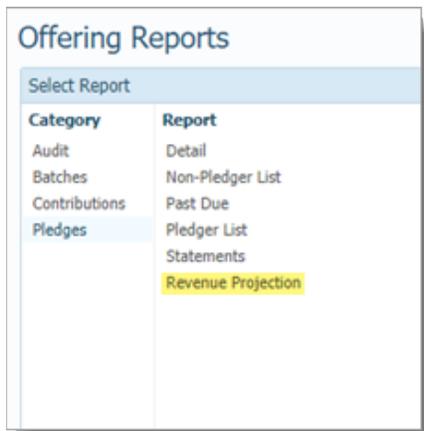
The **Send Contribution Envelopes** column has a **Yes/No** data type. In IQ, Yes/No values are displayed differently, depending on where they appear in the application, specifically:

- **Yes/No:** when appearing as options for query conditions.
- **Checkbox:** (selected) = Yes; (deselected) = No when appearing in query results.
- **True/False:** when appearing in a **.csv** file and mail merge output.

Offering

Revenue Projection Report Added to the Pledges Report Group

As shown in the following illustration, the **Pledges** report group features a new report, titled **Revenue Projection**:



The **Revenue Projection** report lets you view detailed information about a selected fund's future revenue based on the installment schedules for current active pledges.

The following instructions show you how to create a **Revenue Projection** report:

1. On the **Offering Reports** page, select **Pledges > Revenue Projection** to display the report setup.
2. On the **Funds** tab in the right panel, select the fund whose revenue you want to forecast.

Note

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

3. Click [Next](#) to advance to the **Options** tab.

4. On the **Options** tab, do the following:
 - a) In the **Starting Month** dropdown list, select the start month. This is the month from which you want to begin projecting the fund's future revenue.
 - b) Note that in the **Sub Reports** section, two sub-report options are pre-selected:
 - ❖ **Non-Performing Pledges**: shows the total amount pledged that was not included in the forecast due to non-payment.
 - ❖ **Non-Forecastable Pledges**: shows total amount pledged that cannot be included in the forecast due to insufficient data in the fund's pledge records.

If you want to include a sub-report in the output, leave its checkbox selected. Otherwise, deselect the checkbox for the sub-report you want to exclude.
5. Do one of the following:
 - Click **Download CSV** to create and download a **.csv** file of the report to your computer.
 - Click **Download PDF** to create and download a **.pdf** file of the report to your computer.

The report shows five years of projected revenue activity as of the start month in the current year you selected. The report also shows a total dollar amount for contributions already received and a total dollar amount of revenue projected five years into the future.

Data is projected on a monthly, quarterly, and annual basis, which enables you to make direct period-by-period comparisons (for example, a fund's projected giving for 1st quarter 2019 with its projected giving for 1st quarter 2022).

Resolved Issues

Family Directory

Family List Page Occasionally Does Not Open

We resolved an issue that sometimes prevented users from being able to open the Family List page.

Selecting a Custom Organization for Sacrament Records Sometimes Produces an Error

Previously when trying to create a new sacrament record or editing an existing one, users sometimes experienced this error after selecting a custom organization:

```
Cannot choose a custom organization for a sacrament created by a  
different organization
```

We fixed this issue. Users can successfully select a custom organization.

Tuition

Attempts to Delete Unpaid Invoices Produce an Error

Previously, users who tried to delete an invoice with no payment against it experienced this error:

```
Failed to convert parameter value from an Int32 to an Int16
```

We fixed this issue. Users can now successfully delete unpaid invoices.

IQ

Permissions Loophole Enables Some Staff to View Former Parish's Contribution Data

Previously, staff users who transferred assignments from one parish to another within the same diocese were sometimes able to view their former parish's contribution data in results of queries created at their new parish. We added controls to prevent former staff from being able to see contribution data belonging to a parish they no longer have access rights to.

ParishSOFT Diocesan Suite

Resolved Issues

Diocesan Development

Users with Appropriate DDM Permissions Cannot Access Diocesan Giving History Records

Previously when viewing Giving History records, users with the appropriate DDM access rights and permissions could not access diocesan giving history records because the name of the diocese was sometimes missing from the Organization dropdown list. We determined that the list included the name of the diocese only if the family record the user selected was associated with the organization. We fixed this issue. As expected, the dropdown list now includes the name of the diocese.

IQ

Fund Permissions of New DDM Admin Staff Not Being Recognized

Previously, new staff with DDM Admin access rights found that their fund permissions were not being recognized by ParishSOFT IQ. As a result, queries they designed to pull data from DDM funds they had permissions to produced zero results. We fixed this issue. ParishSOFT IQ now honors the fund permissions of new DDM staff.

Reports

Fields in the Parish Census Export Report Sometimes Contain Inaccurate Data

Previously, certain fields in the **Parish Census Export** report sometimes contained inaccurate data. We determined that data was incorrect because the system sometimes pulled data from records belonging to the same families associated with parishes different from the one selected by the user. We fixed this issue. The report now provides accurate census data upon which to make reliable decisions.

Contacting ParishSOFT

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

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