



## VERSION 4.5.7 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.5.7 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

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# ParishSOFT Family Suite

## What's New

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### Family Directory

#### Merge Date Added to Permanent Member's Record

In this release, we enhanced the merge functionality to enable users to merge duplicate member records (for details, see [Merge Function Enhanced to Allow Users to Merge Duplicate Member Records](#)).

After member records are merged, the system adds the date of the merge in the **Merged Date** field in the permanent member's record. As shown in the following illustration, this field is located under the permanent member's photo:

*Note*

*The **Merged Date** field appears only in permanent member records, which are those retained following a duplicate member merge.*



## Administration

### Merge Function Enhanced to Allow Users to Merge Duplicate Member Records

Per customer request, we enhanced the Merge functionality to enable users to merge duplicate member records. When you determine that two or more member records are duplicates of one another, use the instructions below to locate suspected duplicates and merge them.

#### *Note*

*Only staff with the Merge Family Access permission enabled can merge duplicate records. For instructions on setting this permission, see these topics in the Administration module's online Help: "How to Give a Diocesan Staff Member Permission to Merge Duplicate Records" or "How to Give a Parish Staff Member Permission to Merge Duplicate Records."*

### Merging Duplicate Member Records

1. In the Administration module, click . Select the **Merge Records** option to display the **Merge Records** page.
2. For **Merge Type**, select the **Member** option.
3. In the **Member DUID Search** section, identify the members whose records you want to merge. Do the following:
  - a) Enter the DUID of the permanent member in the **Permanent Member DUID** field. The permanent member's record is the one you want to keep.
  - b) Enter the DUID of the duplicate members in the **Duplicate Member DUID** field. The duplicate member's record is the record you want to merge (discard).
  - c) Click .

The system locates the records matching the member DUIDs you entered and respectively displays details for the records in the **Permanent Member** and **Duplicate Member** sections.

4. If you have another duplicate record to merge, enter the member DUID of the record in the **Additional Duplicate Member DUID** field. Then, click .

The system locates the record and adds another **Duplicate Member** section to display details for the added record.

5. Review the search results. Then, do one of the following:

- To merge the records, click .

The records are placed in the merge queue to await overnight processing.

*Note*

*If you want to inspect records in the queue before they are merged, click . Select the **Merge Queue** option. On the **Merge Queue** page, select the **Members** option. The grid shows member records scheduled to be merged.*

- To cancel the merge, click .

After records are merged, the system does the following:

- Sends a notification to each organization associated with the duplicate member. Each organization receiving notification can view details about the merge on the **Notifications** page in the Administration module.
- Records the date of the merge in the **Merged Date** field in the permanent member's record. As shown in the following illustration, this field is located under the permanent member's photo.

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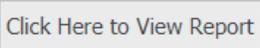


## Running a Merge Report

### *Note*

*The member Merge report is not available in the main v457 release of ParishSOFT Family Suite. The report will be added in a subsequent update coming soon after.*

After a merge, we recommend that you run a Merge report. Use the information in the report to verify that member records were successfully merged. To generate this report:

1. Click . Select **Merge Report** from the dropdown menu.
2. On the **Merge Report** page, select the **Member** option.
3. Specify a date range and select a print option.
4. To generate the report, click .

The report opens in the Report Viewer. Use the toolbar buttons to view, print, and save the report.

## Resolved Issues

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### Family Directory

#### **Fixed:** Deleted Minister Records Continue to Show on the Member's Ministries Tab

Previously, minister records continued to show in **Member Details** (on the **Ministries** tab) after they were deleted in Minister Directory. We fixed this issue. After a ministry record is deleted in Ministry Directory, the system correspondingly deletes it from the **Ministries** tab in the member's record.

#### **Fixed:** "Yes" Response to Prompt for Updating Family Group Status Not Working for Some Users

Some users reported that clicking **Yes** to the prompt that allowed the system to automatically update the family group status of all family members from **Active** or **Inactive** did not work. We resolved this issue. The **Yes** prompt now works as expected.

# ParishSOFT Family Suite

## What's New

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### Census

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## Contacting ParishSOFT

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

	<a href="https://support.parishsoft.com">https://support.parishsoft.com</a>
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)