VERSION 4.6.6 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.6.6 of ParishSOFT Family Suite and Diocesan Suite.

Contents

ParishSOFT Version 4.6.6 Release Notes_last updated September 23, 2020

What's New

Import Contact Information Feature

In this release, we are introducing a productivity enhancement to ParishSOFT Family Suite: the Import Contact Information feature. This new feature enables organizations to update contact information in existing family and member records by importing contact data from other applications, such as Constant Contact and Mailchimp, into Family Directory. The ability to import contact data can save organizations considerable time and effort, especially if you need to update a number of records.

## Granting Permission to Import Contact Information

The ability for parishes to import contact data is controlled by the diocese. By default, parish access to the import feature is disabled, so the diocese retains exclusive rights to import contact data into all of the parishes it oversees. A diocese can, however, delegate import rights to the parishes, which in turn allows parish administrators to give specific staff permission to import.

The following sections show how to enable access rights and permissions associated with the Import Contact Information feature. The first set of instructions show a diocesan administrator how to grant access rights to parishes so they can use the feature. The second set of instructions show parish administrators how to assign the import permission to selected staff.

Granting Parish Access to the Import Contact Information Feature (Diocesan Admin Users Only)

The following procedure shows how to activate the global option that controls parish access to the Import Contact Information feature.

1. Open the **Administration** module.

2. Click Module Settings . In the left panel, select the **Import** option in the **Census** group.

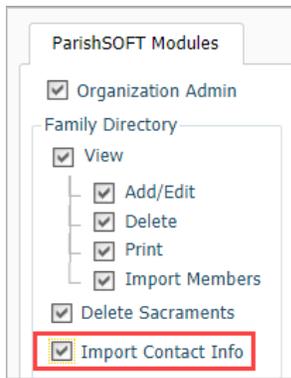3. In the right panel, select the checkbox, shown in the illustration below:
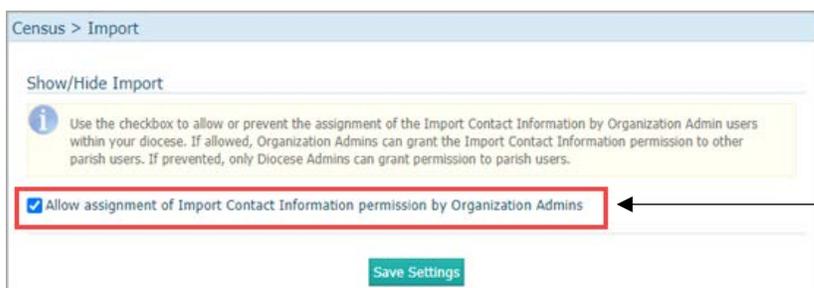
4. Click Save Settings .

    A message is displayed to inform you that the setting was saved. All parishes in your diocese now have access to the Import Contact Information feature. Users with **Organization Admin** access rights can now give specific staff permission to import contact information from external applications. For details on giving staff permission to import contact information, see How to Grant Permission to Staff to Import Contact Information (Organization Admin Users Only).

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Granting Permission to Staff to Import Contact Information (Organization Admin Users Only)

The permission that gives an individual the ability to import contact information is set in his or her staff record. Use the following procedure to give a staff user permission to import contact data into your organization's database.

1. Open the **Administration** module.

2. Click Manage Staff . In the list, select the desired user to open his or her staff record.

3. In the upper-right corner, select the organization/position for which you are assigning the selected staff member import contact permission.

4. Click Edit Details to put the record in edit mode.

5. On the **ParishSOFT Modules** tab, select the **Import Contact Info** option in the Family Directory group, as shown below:

```
ParishSOFT Modules

☑ Organization Admin
 Family Directory
 ☑ View
    ☑ Add/Edit
    ☑ Delete
    ☑ Print
    ☑ Import Members
 ☑ Delete Sacraments
 ☑ Import Contact Info
```

6. Click Save & Close .

The selected user now has permission to import contact information from external applications.

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Preparing the Import File

The import file containing your organization's contact data must be in **.csv** format. An import goes smoothly if the data in the file is prepared correctly. A sample import file is provided to show you the content and structure of the import file. To obtain a template of a sample file that you can edit, complete the following:

1. Open the **Family Directory** module.
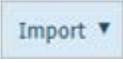
2. Click [Import ▼]. Then, select the option for the type of information you plan to import:

   - **Member Contact Info**

   - **Family Contact Info**

3. Click this link in the area at the top of the page: View Sample Import File.

   If you are updating contact information for members, you can import data into these fields in member records:

   Note

   If any of these fields in the import file contains a null or blank value in a field, the respective field in the database record is not changed by the import.

   *You cannot import data into the **Member DUID** field. This field is used for matching records in the import file with existing database records. It is a required field in the import file and cannot contain a NULL value.*

   - ❖ Member First Name
   - ❖ Member Nick Name
   - ❖ Member Middle Name
   - ❖ Member Last Name
   - ❖ Member Maiden Name
   - ❖ Member Gender (Male, Female, Unknown)
   - ❖ Member Birth Date
   - ❖ Member Date of Death
   - ❖ Member Language
   - ❖ Member Email Address
   - ❖ Member Home Phone
   - ❖ Member Cell Phone
   - ❖ Member Work Phone
   - ❖ Member Pager
   - ❖ Member Fax

If you are updating contact information for families, you can import data into these fields in member records:

Note

If the import file contains a null or blank value in a field, the respective field in the database record is not changed by the import.

*You cannot import data into the **Family DUID** field. This field is used for matching records in the import file with existing database records. It is a required field in the import file and cannot contain a NULL value.*

- ❖ Family Last Name
- ❖ Family First Names
- ❖ Family Email address
- ❖ Family Primary Phone
- ❖ Family Emergency Phone
- ❖ Family Home Address 1
- ❖ Family Home Address 2
- ❖ Family Home City
- ❖ Family Home State
- ❖ Family Home Postal Code
- ❖ Family Home Postal Code Plus 4
- ❖ Family Home Address Country
- ❖ Family Home Address Phone
- ❖ Family Mailing Address 1
- ❖ Family Mailing Address 2
- ❖ Family Mailing City
- ❖ Family Mailing State
- ❖ Family Mailing Postal Code
- ❖ Family Mailing Postal Code Plus 4
- ❖ Family Mailing Country
- ❖ Family Mailing Address Phone

- ❖ Family Other Address 1
- ❖ Family Other Address 2
- ❖ Family Other City
- ❖ Family Other State
- ❖ Family Other Postal Code
- ❖ Family Other Postal Code Plus 4
- ❖ Family Other Address Phone
- ❖ Family Other Address From Date
- ❖ Family Other Address To Date

4. Edit the template as desired.

5. Save the template.

Importing Contact Information

After preparing the file, you can import it. Follow these steps:

1. Open the **Family Directory** module.

2. Click Import ▼ . Then, select the option for the type of file you are importing:

   - **Member Contact Info**

   - **Family Contact Info**

3. Click **Browse**. Locate the import file on your computer. Select the file and follow your browser's process to upload it.

   The Upload field shows the name of the file you selected.

4. Click Import .

   The system checks each record in the import file to determine whether a matching record exists in your database.

   - If the system finds a matching record, it updates the fields in the record accordingly.

   - If the system finds no matching record, it skips the entry in the import file.

   After the system finishes processing the import, a message is displayed to inform you that the import completed successfully.

Viewing an Import Summary Report

After every import, the system generates a report summarizing the imported changes. The report lists the specific changes made to records along with when changes were made and by whom. To view an import summary report, complete the following:

1. Open the **Family Directory** module.

2. Click Import ▼ . Then, select the option for the type of file you are importing:

   - **Member Contact Info**

   - **Family Contact Info**

3. You can download a summary report for the most recent import or for an older import.

   - To download a report for the most recent import, click the Download latest import report link.

   - To download a report for an older import, click the Select different import link. Then, select the desired report from the displayed list. Click **Close** to exit the window.

   After the file downloads, the system returns you to the **Import** page.

Creating a Contact Information Audit Report

The system logs changes made to family and member records as a result of imports through the customer API or the Family Directory Import feature. All changes can be viewed in the newly added **Audit Contact Info** report. The report shows different details based on the type of report (**By Type** or **By User**) selected. Details may include the following:

- Date of the import

- Name of user who performed the import

- Name of member or family whose record was updated

- Count of records successfully updated

- Count of records that failed to update

- Fields updated with details showing the old value and the new value

To create an audit report for contact information imports, complete the following:

Note

You must have Family Directory > Print Permissions to access the Reports tab. Additionally, you must also have Family Directory > Import Contact Information permission to create this report.

1. Open the **Family Directory** module.

2. Click Reports . On the **Select Report** menu, select the **Audit Contact Info** option.

3. Two report options are available. Select the option for the type of report you want to create:

- **By Type**: lets you select the data source for the import (File Import or Customer API), the type of contact data imported (Member or Family), and a date range for changes.

- **By User:** lets you select the users whose changes you want to view, the type of contact data imported (Member or Family), and a date range for the imports.
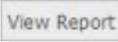
4. Click View Report to generate the report.

   The report opens in the Report Viewer.

5. If desired, use the toolbar buttons to print or save the report.

Resolved Issues

System-Wide

Fixed: Users Experience Random Logouts During Active Sessions

Some users reported that the system sometimes issued a "session expired" message and logged them out even though they were actively working. This issue was fixed.

Fixed: Users Experience Random Logouts and Data Loss During Mail Merge Sessions

Some users reported that while saving a mail merge template or adding a field to a template, the system sometimes issued a "session expired" message and logged them out. This issue was fixed.

IQ

Fixed: Queries Occasionally Hang Indefinitely

Some customers reported sometimes encountering slow performance or hangs when trying to save queries using the Save and Save as functions. Other customers reported that they could not save or run queries after dragging result columns to a new location. We fixed these issues.

Diocesan Suite

What's New

Administration

Option Added to Allow Parishes to Import Contact Information from Third-Party Apps

As shown in the illustration below, a new global option, labeled **Import**, was added to the **Census** group on the **Module Setting** page. This option allows the diocese to give parishes the right to import contact information from third-party applications into ParishSOFT Family Directory. By default, the option is disabled so that only the diocese can import contact data. To give parishes the right to import, a user with Diocesan Admin access must select the option to enable it.
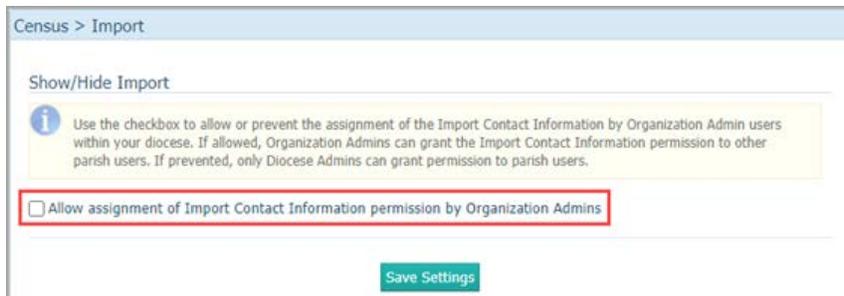
For details on activating this global permission, see "How to Grant Parishes Access to the Import Contact Information Feature (Diocesan Admin Users Only)."

Permission Setting Added to Give Parish Staff the Ability to Import Contact Information

As shown in the illustration below, a new option, labeled **Import Contact Info**, was added to the staff record. If global access to the Import Contact Information feature is enabled (see previous entry), this option gives the selected staff user permission to import contact data from external applications into Family Directory. By default, the option is disabled. To give a staff user permission to import, select the option to enable it.
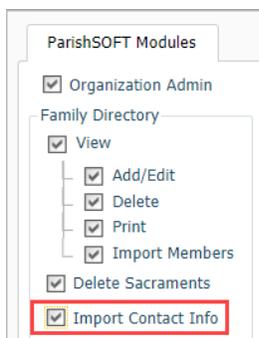
For details on activating this permission, see "How to Grant Permission to Staff to Import Contact Information (Organization Admin Users Only)."

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)

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