

## ParishSOFT Accounting May 2020 Release Notes

These release notes inform you of new features, enhancements, and changes made in the May 2020 release of ParishSOFT Accounting.

### Browser Compatibility

ParishSOFT Accounting supports the following browsers only:

-  Internet Explorer, Version 9.0, 10.0, 11.0.

*Note*

*If your browser is IE 10 or IE 11, when you display the ParishSOFT Accounting website, a message appears to inform you that the browser is not compatible with the site. To resolve this error message, turn on the browser's setting to Compatibility View.*

-  Microsoft Edge 41.16299.15.0 HTML 16.16299
-  Firefox:
  - ❖ For PC, Version 40.0 or higher
  - ❖ For MAC, Version 40.0 or higher
-  Safari, Version 9.0 or higher
-  Chrome, Version 62.0 or higher

### Additional Information

For information about recommended settings, IE's Compatibility View, and tips for using the various browsers, refer to our **Browser Information** page. To view this page, click the [Browser Information](#) link, located in the **Support & Services** section on your dashboard.



# What's New

## Site-Wide

### Website Address of ParishSOFT Accounting's Video Library Changed

The website address of our growing library of education and training videos has changed. Please make note of the site's new address:

<https://www.parishsoft.com/training/pathfinder/>

If you bookmark the website, be sure to update the address in your browser's bookmark manager.

#### Consolidation Manager

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## Reports

### Vendor 1099 Summary Report Added

Per customer request, we added a new report called **Vendor 1099 Summary**. This report provides a diocese with a count of vendors paid \$600.00 or more during a selected calendar year in each church it manages. If using pre-printed 1099 forms, a diocese can use the information in this report to determine how many forms to buy in bulk for its churches.

To generate the report, complete the following:



1. Click .
2. In the **Standard Reports** section, open the **Lists** group. Then, select the **Vendor 1099 Summary** option to display the configuration page.
3. Configure the report. Be sure to specify the correct calendar year and select which church or churches to include in the report.

Click  to view the report in the Report Viewer.

For each selected organization, the **# MISC Vendors** column shows the number of vendors paid \$600.00 or more in the selected calendar year.

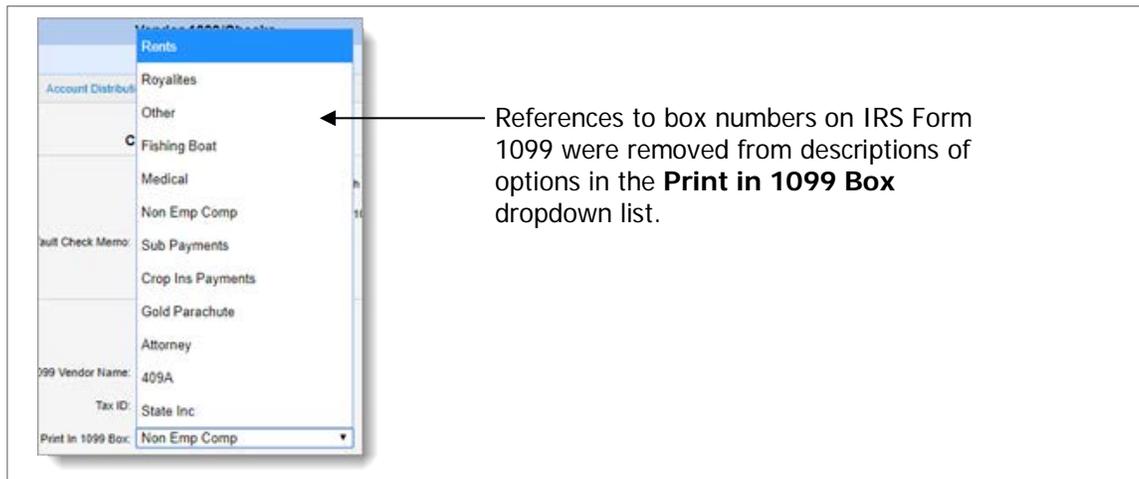
If you scroll to the end of the report, the total number of vendors in all selected organizations is provided. A diocese can use this total to determine the number 1099 forms to order.



## Vendors

### Box Number References Removed from 'Print in 1099 Box' Options

Previously, descriptions of options in the **Print in 1099 Box** dropdown list on the **Vendors > 1099/Checks** page included box number references (for example, **Box 1: Rents**). To support the upcoming release of IRS Form 1099-NEC, which will replace 1099-MISC box 7 for reporting nonemployee compensation, we removed the box number references from the dropdown list options. As shown in the illustration below, descriptions of options remain the same:



## Reports

### Employers Phone Number Can Be Printed on 1099 4-Up Blank Paper Form

Previously, the employer's phone number could not be printed on the 1099 4-Up blank paper form due to space limitations. We fixed this issue as follows:

- If the employer's phone number is specified in the 1099 Payer Info setup and the employer's address uses one address line, the phone number now prints on the form.
- If the employer's phone number is specified in the 1099 Payer Info setup and the employer's address uses two address lines, the phone number cannot be printed due to lack of space. If you need the phone number to appear on the form, do the following:



1. Click **Setup**.
2. Select the **1099 Payer Info** option.
3. Remove information from one of the employer's address line fields.

Space is now available to print the employer's phone number on the 1099 4-Up Blank Paper form.

## 1099-Misc Review Report Added to Vendors Group

The **Standard Reports > Vendors** group now features a new report, called **1099-Misc Review**. The report shows the total number of 1099 vendors and the total dollar amount paid in the selected calendar year to individuals that used Form 1099 to report income. If using pre-printed 1099 forms, organizations can use the information in the report to determine the number of forms to order.

To generate a **1099-MISC Review** report, complete the following:



1. Click .
2. In the **Standard Reports** section, open the **Vendors** group.
3. Select the [1099-Misc Review](#) option
4. Select the calendar year you are reporting on.
5. Select the vendors and specify the vendor type.
6. If desired, enter a subtitle for the report.
7. Click  to view the report in the Report Viewer.
  - For the years prior to 2020, the vendors listed in the report meet these conditions:
    - ❖ Have the **Print 1099 for this Vendor** option enabled in their vendor record.
    - ❖ Were paid \$600.00 or more in the selected calendar year.
  - For the year 2020 and beyond, the vendors listed in the report meet these conditions:
    - ❖ Have the **Print 1099 for this Vendor** checkbox is selected in their vendor record.
    - ❖ Were paid \$600.00 or more in the selected calendar year.
    - ❖ Do not have the **Non Emp Comp** option selected in the **Print in 1099 Box** dropdown list in their vendor record.

## New Options Added to Vendors Report Group

As a result of adding support for new and upcoming IRS tax forms, we modified the report options listed in the **Standard Reports > Vendors** group. In the **Vendors** group, these report options are now available for selection (see next illustration):

### *Note*

*The 1099-MISC e-file and 1099-NEC e-file options are not currently available. They will be available in a release coming later this year.*

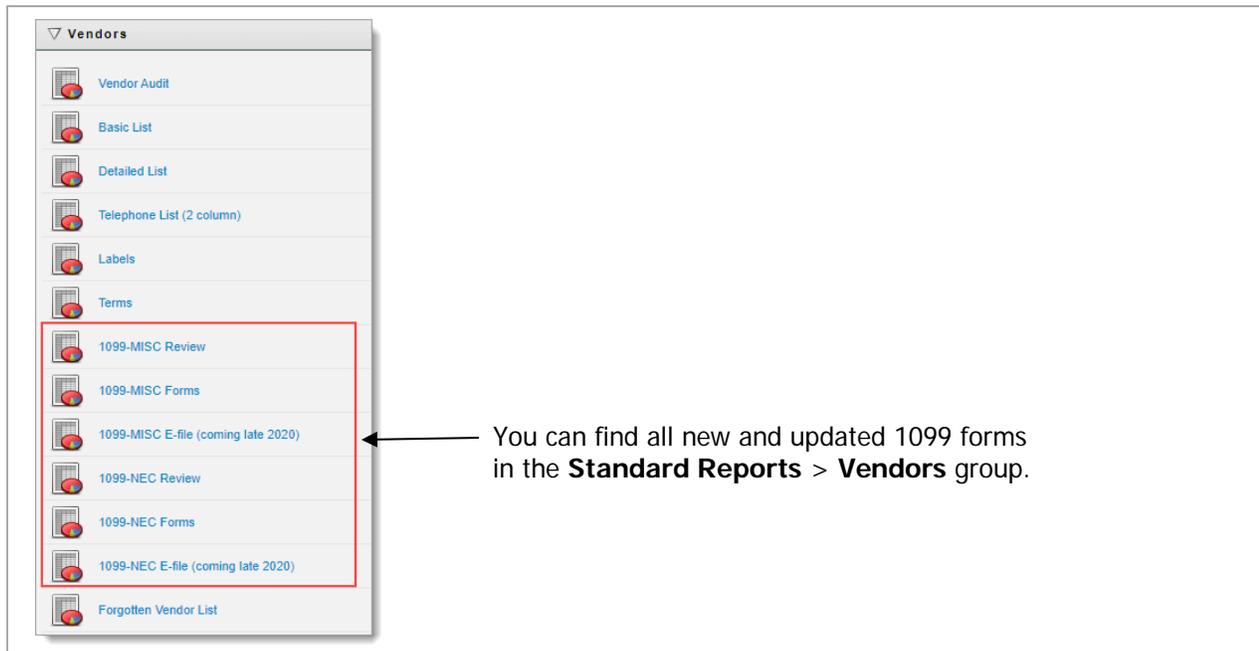
- 1099-MISC Preview
- 1099-MISC Forms
- 1099-MISC e-file (coming late 2020)
- 1099-NEC Preview
- 1099-NEC Forms
- 1099-NEC e-file (coming late 2020)

## 1099-MISC Form Updated to the Year 2020

Form 1099-MISC, used to report payments made to an organization's non-employees, is now updated to the year 2020. The updated form reflects the new IRS reporting requirements for reporting payments of \$600.00 or more to non-employees. You can the form in the **Standard Reports > Vendors** group, shown in the illustration below:

### Note

*As noted in the illustration below, the 1099-MISC e-file and 1099-NEC e-file options are not currently available. They will be available in a release coming later this year.*



## Form 1099-NEC Added

For 2020 reporting, the IRS will require employers to use Form 1099-NEC to separately report non-employee compensation from other 1099-MISC income. To comply with the new reporting requirements, we added the 1099-NEC form to the **Standard Reports > Vendors** group, shown in the previous illustration.

To generate this report, complete the following:



1. Click .
2. In the Standard Reports section, open the Vendors group.
3. Select the [1099-NEC Forms](#) option
4. Select the calendar year you are reporting on.
5. Select the vendors and specify the vendor type.
6. In the **Form Name** section, select the type of form you want to use.

7. If necessary, adjust the alignment settings for printing onto form paper. The form is moved in 1/100-inch increments.
8. Click  to view the report in the Report Viewer.

*Note*

*If you are printing a 1099 4-Up Blank form and the employer's telephone number fails to appear on the form, you need to edit the 1099 Payer Info form to remove information from one of the Address fields. Due to space limitations, the form cannot accommodate the employer's phone number if both fields contain information. To edit the form, see "Setting Up 1099 Payer Information" in the Ledger and Payables User Guide.*

## Preview Report for Form 1099-NEC Added

In the **Standard Reports** section, the **Vendors** group (see previous illustration) also features a new report called **1099-NEC Preview**. This report can help you determine the number of 1099-NEC forms to order (if you plan to use pre-printed forms). You can also use the information in this report to preview your 1099-NEC forms and check for errors prior to e-filing them.

To generate this report, complete the following:



1. Click .
2. In the **Standard Reports** section, open the **Vendors** group.
3. Select the [1099-NEC Review](#) option
4. Select the calendar year you are reporting on.
5. Select the vendors and specify the vendor type.
6. If desired, enter a subtitle for the report.
7. Click  to view the report in the Report Viewer.

For the years prior to 2020, the vendors listed in the report meet these three conditions:

- Were paid \$600.00 or more in the selected calendar year.
- Have the **Print 1099 for this Vendor** checkbox is selected in their vendor record.
- Have the **Non Emp Comp** option selected in the **Print in 1099 Box** dropdown list in their vendor record.

# Resolved Issues

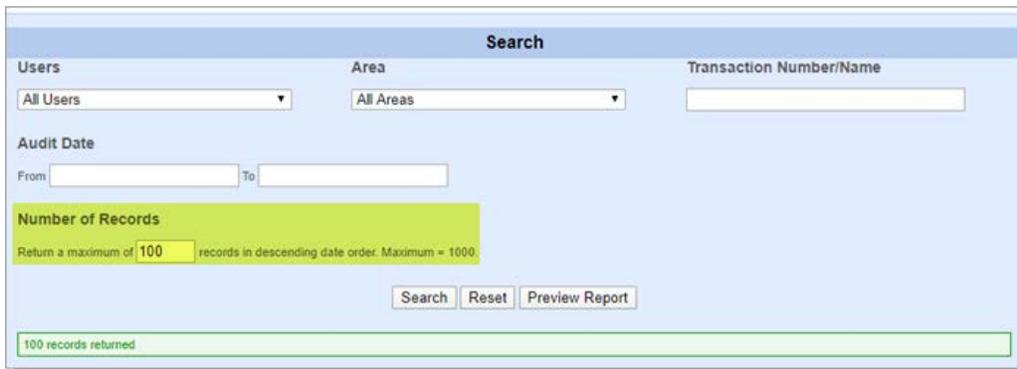


## Audit

### CNACT-1600 Fixed: System Hangs When Requested to Display Large Set of Audit Records

Previously when users selected to search for more than 1000 audit records, the system struggled to load so many records and became unresponsive. To fix this issue, we made several changes to the behavior of the **Number of Records** field. Make note of the following:

- By default, the field is set to return a maximum of 100 audit records (see illustration below).



The screenshot shows a search interface for audit records. It includes dropdown menus for 'Users' (set to 'All Users') and 'Area' (set to 'All Areas'), and a text input for 'Transaction Number/Name'. Below these is an 'Audit Date' section with 'From' and 'To' date pickers. The 'Number of Records' field is highlighted in yellow and contains the text: 'Return a maximum of 100 records in descending date order. Maximum = 1000.' At the bottom of the search area are buttons for 'Search', 'Reset', and 'Preview Report'. A green status bar at the very bottom of the window displays '100 records returned'.

- The field only accepts a value between 1 and 1000.
- The field does not accept a value greater than 1000. If the user enters a value greater than 1000, the search returns 1000 audit records only.
- The field does not accept a null value. If the user sets the field to empty or blank, the search returns 100 audit records only.