



PARISHSOFT DEVELOPMENT MANAGER v1.3 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v1.3 of ParishSOFT Development Manager.

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What's New in Version 1.3

Reports

New Diocese Report: Contribution History by Fund

The **Diocese** report group features a new report, called **Contribution History by Fund**. For each selected organization, this report shows the dollar amount of contributions made to selected funds by month, quarter, and year (for the year specified). In addition, the report provides a contribution history of donations made during the same financial periods in each of the three years prior to the user-specified year.

To generate the report:

1. In the report dropdown list, select **Contribution History by Fund**.
2. Enter the report end year.
3. Specify how you want to format the final report. Choose one of the following options:
 - **One Fund Per Page**: prints a separate page for each fund selected.
 - **Multiple Funds Per Page**: prints a single page showing the sum of contributions for all selected funds.
4. In the list of funds, select those you want to include in the report. To include all funds, select the **Fund Name** checkbox.
5. In the list of organizations, select the organizations for which you are generating the report. To select all organizations, select the **Organization Name** checkbox.
6. In the upper right, click this button: . Then, select the type of file: **Excel** or **PDF**.

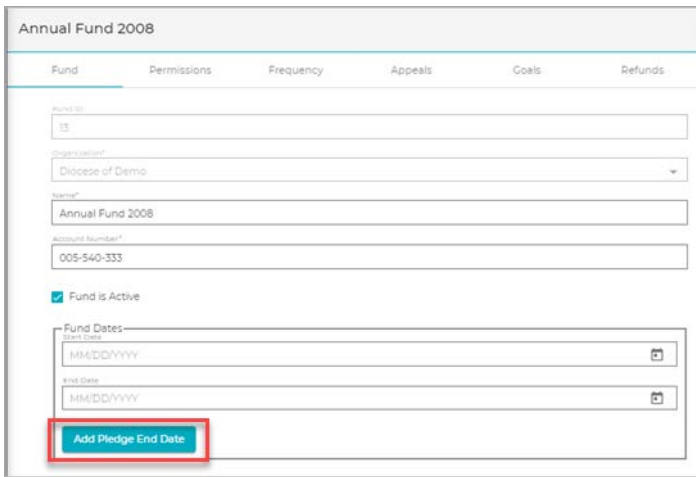
Funds

Added Ability to Bulk Add End Dates to Pledge Records

The Bulk Add feature was added to assist users transitioning to the updated ParishSOFT Offering or Development Manager solutions. This feature simplifies the work of updating multiple pledge records with a pledge end date, which is a best practice for keeping your pledge records in order.

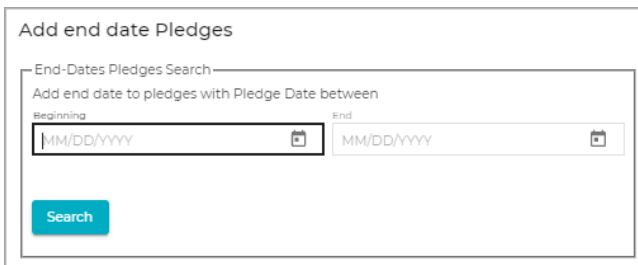
To bulk-add a pledge end date to your pledge records:

1. Open the desired fund.
2. Click the **Add Pledge End Date** button (shown below), which was added to the **Fund** tab:



The screenshot shows the 'Annual Fund 2008' form with tabs for Fund, Permissions, Frequency, Appeals, Goals, and Refunds. The 'Fund' tab is active. Fields include Fund ID (13), Organization (Diocese of Demo), Name (Annual Fund 2008), and Account Number (005-540-333). A checkbox for 'Fund is Active' is checked. The 'Fund Dates' section has 'Start Date' and 'End Date' fields, both with MM/DD/YYYY format and calendar icons. A blue button labeled 'Add Pledge End Date' is highlighted with a red rectangular box at the bottom of the form.

The **Add end date Pledges** window opens:



The screenshot shows the 'Add end date Pledges' window. It has a title bar and a search area. The search area is titled 'End-Dates Pledges Search' and contains the text 'Add end date to pledges with Pledge Date between'. Below this are two date input fields: 'Beginning' and 'End', both with MM/DD/YYYY format and calendar icons. A blue 'Search' button is located at the bottom left of the window.

3. In the **Beginning** and **End** fields, enter the first and last date in your start date range. The system will search your database for pledges with a start date within the range you specify and display those for that have no end dates.

4. Click **Search**.

The **Enter End Date** window opens. The system indicates the number of pledge records within the date range you specified that have no end dates.

5. In the **End-Date to assign** field, enter the end date for the pledge records.
6. Click **Set End Date** to apply the end date you specified to the records.

Batches




Batch ID Added to Card and Grid Views

To assist with tracking batches, we added the **Batch ID** to both the card and grid views on the **DM Batches** page. The batch ID is a unique code assigned to every batch in the system. In card view, the batch ID precedes the batch description. In grid view, the batch ID is in the **Batch ID** column, which was added to the left of the **Description** column.

Pledges

Added Ability to Clear a Designation from a Pledge

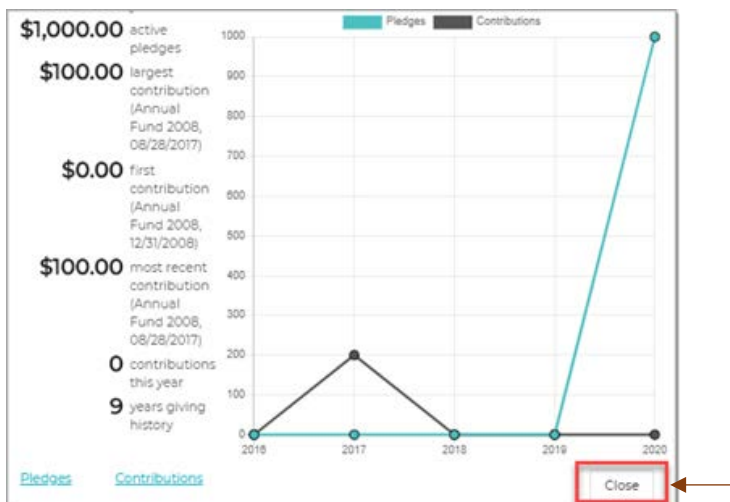
We added the ability to clear a designation from a pledge. To do this:

1. On the **DM Pledges** page, open the pledge record.
2. In the **Current Pledge** field, click this button:  (**Edit Designations**)
A list of designations currently associated with the pledge is displayed.
3. For the designation you want to clear, click this button:  (**Clear**).
4. Click  to confirm the change.

The system clears the designation by setting the value in the **Amount** field to \$0.00.

Close Button Added to Lifetime Giving Window

Per customer request, we added a **Close** button to the bottom of the **Lifetime Giving** window (shown below). Clicking this button exits the window and returns you to the pledge record.



Resolved Issues

Reports

Resolved: [Download of Parish Master Report Does Not Complete](#)

We fixed an issue that caused an incomplete download of Parish Master report.

Imports

Resolved: [Lockbox Imports Sometimes Show the Wrong Date](#)

Some users reported a difference between the date on the batch file in the lockbox import and the dates displayed for pledges and contributions in the imported batch. To fix this issue, we adjusted the settings on the time zone converter. The dates now match as expected.

Resolved: [Check Numbers Missing from Initial Contributions in Pledge Lockbox File](#)

Previously in imported pledge lockbox files, check numbers were missing for pledges that had the **Initial Contribution** checkbox selected. We fixed this issue.

Batches

Resolved: [Error Occurs When Contribution Date Earlier Than Default Posting Date for a Batch](#)

Previously, users experienced an error when trying to post a contribution with a date that was earlier than the default posting date for the batch but later than the fund start date. We fixed this issue.

Pledges

Resolved: [50-Character Limit on Comments Field Sometimes Too Short](#)

Previously, the character limit on the **Comments** field for pledge adjustments was set to 50, which was sometimes too short for the system-required explanations. The maximum character limit was increased to 3000 characters.

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)