PARISHSOFT DEVELOPMENT MANAGER V1.4 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v1.4 of ParishSOFT Development Manager.

Table of Contents

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

What's New in Version 1.4

Batches

Family ID Column Replaces Contribution Type Column in Batch Postings List Report

In the **Batch Postings List Export** report, we removed the **Contribution Type** column and replaced it with the **Family ID** column, which according to users, provides more valuable information. The illustration below shows the location of the newly added **Family ID** column in the report:

Batch Postings List Export

123 Main Street

Adirondack, NY 12808

Batch Description: 2-23-2010 ST. Micheal, 482, B#201
Batch Status: Open
Batch ID: 1640

Pledges (1)

Start Date	Total Pledged	Family ID	Member ID	Family	On Behalf of Organization	Fund
2/23/2010	$900.00	61327		GDPR GDPR	Little Flower	Annual Fund 2009

Pledge Summary

Fund	Total Pledged	Pledge Count
Annual Fund 2009	$900.00	1
Total	$10,000.00	1
Posted	$900.00	1
Balance	$9,100.00	0

Contributions (1)

Date	Amount	Check #	Family ID	Family	Fund
2/23/2010	$900.00	1234	61327	GDPR GDPR	Annual Fund 2009

Contributions Summary

Fund	Contribution Total	Paid Count
Annual Fund 2009	$900.00	1
Total	$7,000.00	100
Posted	$900.00	1
Balance	$6,100.00	99

Batch ID Added to the Batch Record

The batch ID is a unique number assigned by the system that identifies each batch in your system. In this release, we added the batch ID field above the **Description** field in the batch record.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Contributions

Tax Deductible Checkbox Replaced with Dropdown List

To provide more efficient way of allowing you to edit the tax-deductible status of a group of contributions, we removed the **Tax Deductible** checkbox control and replaced it with a dropdown list. This change resulted in a slight modification to the procedure for multi-editing contributions. The updated procedure is provided below:

1. Display the **DM Contributions** page.

2. Select the contribution records you want to update. Then, click ✏ to display the **Contributions Details** page.

3. In the **Edit Values** panel on the right, select the **Tax Deductible** checkbox.

   The **Tax Deductible** dropdown list in the left panel is now enabled for editing.

4. Select the desired option from the **Tax Deductible** dropdown list:

   - **Yes**: changes the status of all selected contributions to tax deductible.

   - **No**: changes the status of all selected contributions to not tax deductible.

5. Click 💾.

   All selected contributions are updated with the change.

Reports

Audit Report Updated to Track Changes to Contribution and Pledge Data

In this release, we updated the **Audit** report so that, in addition to batch data, users can now track changes made to an organization's contribution and pledge data.

To accommodate this change, we added the **Audit Report Type** group to the **Audit** report setup. In this group, the three audit reports are listed. Simply select the checkbox next to the type of report you want to create. You can select one or more reports, as shown in the illustration below:

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Contribution History by Donor Report Added to Diocese Reports Group

This release features a new **Contribution History by Donor** report. This report enables you to view a historical record of donor contributions made over a four-year period. The following instructions show you how to set up and run this report:

1. Display the **Diocese Reports** page.

2. From the **Select a Report** menu, select the **Contribution History by Donor** option.

3. Set up the report as desired by entering values for the following:

   - **End Year**: select the last year in the four-year reporting period. For example, if you want to generate a report for 2017 through 2020, enter 2020 for the end year.

   - **Report Type**: select the type of report you want to create:

     ❖ **All Donors**: includes all donors in the selected organizations who donated to the selected funds.

     ❖ **LYBUNT**(Last Year But Unfortunately Not This Year): includes all donors who made contributions in the year prior to that entered into the **End Year** field but not in that year.

       For example, if 2020 is entered for the end year, the report includes donors who made contributions in 2019 (the year prior) but not in 2020.

     ❖ **SYBUNT** (Some Year But Unfortunately Not This Year): includes donors who made contributions in one or more years prior to the year entered into the **End Year** field but not in that year.

       For example, if 2020 is entered for the end year, the report includes donors who made contributions in any previous year but not in 2020.

     ❖ **New Donors**: includes donors who made contributions in the year entered into the **End Year** field but not in any of the three years prior (includes donors who pledged in prior years but never made payments).

       For example, if 2020 is entered for the end year, the report includes only those donors who made contributions in 2020.

     ❖ **Org Summary**: on a separate line, shows the total contribution amount for each selected organization.

   - **Fund**: select one or more funds to include in the report. To select all funds in the list, select the checkbox to the left of the **Fund Name** header.

   - **Organization**: select one or more organizations to include in the report. To select all organizations in the list, select the checkbox to the left of the **Organization Name** header.

4. To download the report, click to [icon]. From the menu, select the desired format for the report:

- **Excel**: the Excel version uses the same data source as the PDF but contains more data, which is presented in comma-separated layout. The Excel version is the option to choose if you want to do a mail merge or if you want to import the data in the selected report into a spreadsheet program, such as Microsoft Excel.

- **PDF**: the PDF version is useful for most purposes because it extracts the most commonly needed data from the report and presents it in a well-designed layout. Note that the PDF contains less information than the CSV version and is a more suitable option when you need a document that is easily read.

Dollar Range Report Added to the Diocese Reports Group

We added a new report, called **Dollar Range** report, to the **Diocese Reports** group. This new report provides data that a diocese can use to identify donor giving patterns over time and determine possible future trends in giving. The data in this report can help a diocese design strategies to potentially increase a fund's financial support. The following instructions show you how to set up and run this report:

1. Display the **Diocese Reports** page.

2. In the **Select a Report** menu, select the **Dollar Range** option.

3. Set up the report as desired by specifying values for the following:

- **Date**: specify a start and end date for contributions to include in the report.

- **Amount Ranges**: specify the dollar range of contributions to report on by entering a minimum amount into each line.

- **Fund**: select one or more funds to include in the report.

4. Click [icon] to export the report. From the menu, select the desired format for the report:

- **Excel**: the Excel version uses the same data source as the PDF but contains more data, which is presented comma-separated layout. The Excel version is the option to choose if you want to do a mail merge or if you want to import the data in the selected report into a spreadsheet program, such as Microsoft Excel.

- **PDF**: the PDF version is useful for most purposes because it extracts the most commonly needed data from the report and presents it in a well-designed layout. Note that the PDF contains less information than the CSV version and is a more suitable option when you need a document that is easily read.

5. Follow your browser's procedure to view the report and print it, if desired.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Contribution Detail Statement Report Enhanced

In this release, major enhancements were made to the Contribution Detail Statement report to enable you to customize your donor letters and give them a professional look. Take a look at the list below, which provides a brief description of each new feature. If you want more detail, click the link to jump to respective section later in this document.

- Letterhead graphic can now be inserted into donor letters.

- Image of signer's handwritten signature can now be inserted into donor letters.

- Multiple versions of Body of Statement text can now be created and saved for reuse.

- Signer's printed name can now be added to donor letters.

Inserting a Custom Letterhead Graphic into Donor Letters

You can now insert a letterhead graphic at the top of your donor letters. Using a letterhead gives your correspondence a more finished and professional look. Alternatively, you can insert a photo or an image featuring your church logo.

Letterhead Specifications

If you plan to insert a letterhead graphic, you must already have the file containing the graphic saved on your computer in one of these formats: **.bmp**, **.png**, **.jpg**. Color graphics are allowed. Note the location of the file.

Make sure that the file containing the graphic is sized to fit in the 1.5-inch x 8-inch area at the top of the letter.

Adding a Letterhead Graphic to the Report Setup

Note

The procedure below is intended only for users who want to add a letterhead graphic to their donor letters. If you do not plan to insert a graphic letterhead or if you want to insert a letterhead that only consists of your organization's name and address, skip this procedure.

In the setup for the Contribution Detail Statement report, letterhead graphics are stored in the **Letterhead** dropdown list. To make a graphic available for a user to insert into a donor letter, you must first add it to this dropdown list. The instructions below show you how to do this.

Note

You can add up to three letterhead graphics to the **Letterhead** *dropdown list.*

1. Display the **Donor Reports** page. Then, select the **Contribution Detail Statement Report** from the **Select a Donor Report** dropdown list.

2. In the upper right, click this button: . From the displayed menu, select this option: **Contents**.

3. For each letterhead graphic that you want to add, complete the following:

   a) On the **Statements** tab in the **Letterhead** section, click ✚ (**Add new Letterhead**).

   b) In the **Name** field, type a name for the graphic file.

   c) As shown below, position your mouse on top of the File icon to display the **Change** button. Then, click the **Change** button.
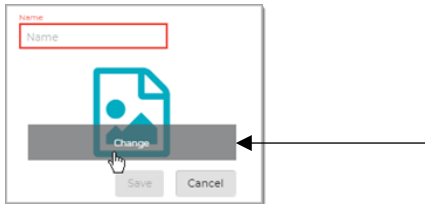
   d) Navigate to the location on your computer where you saved the graphic file and open it.

   The selected image replaces the File icon.

4. Click **Save**.

   The system adds the graphic file to the **Letterhead** dropdown list. Users can now select the file when setting up a Contribution Detail Statement report.

Inserting a Letterhead into the Donor Letter

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. From the **Letterhead** dropdown list, select one of these options:

   • **None**: leaves the letterhead area at the top of the donor letter blank.

   • **Use Organization's Name and Address**: inserts a letterhead that consists of your organization's name and address only. This information is pulled from the organization record, which is defined in the ParishSOFT Administration module.

   • **Graphical Letterheads**: inserts the image in the selected graphic file into the top of the letter.

3. Click **Save & Close**.

   When you run the report, the system displays the type of letterhead you selected into the top of the donor letter.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Editing the Name of an Option in the Letterhead Dropdown List

If you want to change the name of an option in the **Letterhead** dropdown list, do the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ . From the displayed menu, select this option: ▤ **Contents**.

3. Complete the following:

   a) On the **Statements** tab in the **Letterhead** section, select the option you want to rename from the **Letterhead** dropdown list.

   b) Click ✏. Then, in the **Name** field, type a new name for the option.

   c) Click **Save** to save the change.

      The system updates the name of the option in **Letterhead** dropdown list.

Removing an Option from the Letterhead Dropdown List

To remove a letterhead option you no longer want, complete the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ . From the displayed menu, select this option: ▤ **Contents**.

3. Complete the following:

   a) On the **Statements** tab in the **Letterhead** dropdown list, select the option you want to remove.

   b) Click ⛔.

      You are prompted to confirm the deletion.

   c) Click **Yes** to confirm.

      The system removes the option from the **Letterhead** dropdown list. Note that the actual graphic file remains on your computer so you can add it back later, if desired.

Inserting an Image of a Handwritten Signature into Donor Letters

You can now insert an image of a handwritten signature in the signature area at the bottom of a donor letter. A handwritten signature is recommended because it adds a personal touch and gives your statements a more professional look. The following sections show you how to create and manage signature images.

Creating a Signature Image File

Before you can insert a signature image into a donor letter, you must create the signature image file. For each signature image you want to create, do the following:

1. Have the letter signer handwrite his or her signature on a blank piece of paper.

2. Scan the signature or take a photo of it.

3. Size the image to 264 by 48 pixels.

4. Save the image with a unique name to your computer in one of the following file formats: **.bmp**, **.png**, **.jpg**. Make note of where you save the file.

   You can now configure the **Signature** dropdown list in the report setup to include the images you just created.

### Adding a Signature Images to the Report Setup

In the setup for the Contribution Detail Statement report, signature images are stored in the **Signature** dropdown list. To make a signature image available for a user to insert into a donor letter, you must add it to this dropdown list. The instructions below show you how to do this.

Note

*You can add up to five signature images to the **Signature** dropdown list.*

1. Display the **Donor Reports** page. Then, select the **Contribution Detail Statement Report** from the **Select a Donor Report** dropdown list.

2. In the upper right, click this button: ⚙ . From the displayed menu, select this option: ▤ Contents.

3. Complete the following:

   a) On the **Statements** tab in the **Signature** section, click ➕ (**Add new Signature**).

   a) In the **Name** field, type a name for the signature image file.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

b) As shown below, position your mouse on top of the File icon to display the **Change** button. Then, click the **Change** button.
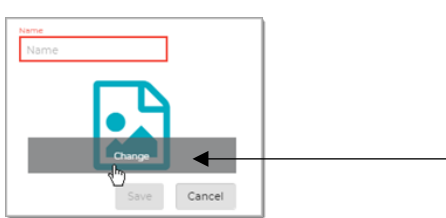
c) Navigate to the location on your computer where you saved the signature image file and open it.

The selected image replaces the File icon.

4. Click **Save**.

The system adds the image file to the **Signature** dropdown list. Users can now insert the signature image into donor letters.

Inserting a Signature Image into a Donor Letter

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the **Signature** dropdown list, select the desired signature image file.

When you run the report, the selected signature image is inserted into the signature line of the donor letter.

Editing the Name of an Option in Signature Dropdown List

If you want to change the name of an option in the **Signature** dropdown list, do the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ . From the displayed menu, select this option: 🗒 **Contents**.

3. Complete the following:

a) On the **Statements** tab in the **Signature** section, select the option you want to rename from the **Signature** dropdown list.

b) Click ✎ . In the **Name** field, type a new name for the option.

c) Click **Save** to save the change.

The system updates the name of the option in **Signature** dropdown list.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Removing an Option from the Signature Dropdown List

To remove a signature option you no longer want, complete the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ (**Configure**). From the displayed menu, select this option: 🖹 **Contents**.

3. Complete the following:

   a) On the **Statements** tab in the **Signature** section, select the option you want to remove from the **Signature** dropdown list.

   b) Click 🚫.

   You are prompted to confirm the deletion.

   c) Click **Yes** to confirm.

   The system removes the file from the **Signature** dropdown list. Note that the actual file remains on your computer so that you can add it again later, if desired.

Creating and Saving Multiple Versions of Body of Statement Text

You can now create up to five versions of body of statement content and save each version as a template that users can select to include in contribution statements. This feature is especially useful if your organization has different donor segments because it enables you to provide specific and more personalized messaging that can help to engage each group more effectively.

The following sections show you how to create and manage body of statement templates.

Creating a Body of Statement Template

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ (**Configure**). From the displayed menu, select this option: 🖹 **Contents**.

3. For each template you want to create, complete the following:

   a) On the **Statements** tab in the **Body of Statement** section, click ➕ (**Add new Body of Statement**).

   b) In the **Name** field, type a name for the template you are creating.

   Note

   *Make sure the name you give each template a unique and descriptive name. Type the name exactly as you want it to appear in the **Body of Statement** dropdown list on the **Statements** tab.*

c) In the space provided, type your message text. If desired, use the controls above the text area to format your text. For example, you can select a font and font size that you think pairs well with your message.

d) Click **Save**.

The system saves the template and adds it to the **Body of Statement** dropdown list for later retrieval and editing, if desired.

Inserting a Template into a Contribution Detail Statement Report

When ready to generate a Contribution Detail Statement report, a user can insert the text in a template into the message area of the donor letter. Here's how:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement Report** option.

2. In the report setup, select the desired template from the **Body of Statement** dropdown list.

When the report is generated, the text in the selected template is inserted into the message area of the donor letter.

Editing a Body of Statement Template

Use these instructions to make changes to an existing body of statement template:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: (**Configure**). From the displayed menu, select this option: **Contents**.

3. Complete the following:

a) On the **Statements** tab in the **Body of Statement** section, select the option for the template you want to edit from the **Body of Statement** dropdown list.

The selected template's text is displayed.

b) Click . Then, edit the text as desired.

c) When done, click **Save**.

The system updates the template with your changes.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Removing a Template Option from the Body of Statement Dropdown List

To remove a template you no longer use, complete the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙ . From the displayed menu, select this option: ▤ **Contents**.

3. Complete the following:

   a) On the **Statements** tab in the **Body of Statement** section, select the template option you want to remove from the **Body of Statement** dropdown list.

   b) Click ⛔.

   You are prompted to confirm the deletion.

   c) Click Yes to confirm.

   The system removes the option from the **Body of Statement** dropdown list.

Adding the Signer's Printed Name to Donor Letters

The printed name is simply the typed form of the name of the person who signs a donor letter. If your donor letter includes a handwritten signature, a generally accepted practice is to show the signer's full name in print under the signature.

The instructions in this section show you how to add and manage printed names.

Adding the Signer's Name to the Report Setup

To make printed names available for a user to insert into a donor letter, you must first add them to the **Printed Name** dropdown list in the report setup. The instructions below show you how to do this.

Note

You can add up to five names to the Printed Name dropdown list.

1. Display the **Donor Reports** page. Then, select the **Contribution Detail Statement Report** from the **Select a Donor Report** dropdown list.

2. In the upper right, click this button: ⚙. From the displayed menu, select this option: ▤ **Contents**.

3. Complete the following:

   a) Scroll down to the **Printed Name** section at the bottom of the **Statements** tab. Then, click ✚ (**Add new Printed Name**).

   a) In the **Title** field, type a label for the printed name option. This label is what users see in the **Printed Name** dropdown list.

   b) In the **Name** field, type the signer's name. This is the name that is typed under the signer's signature in the donor letter.

   c) Click **Save** .

     The system adds the printed name to the **Printed Name** dropdown list in the report setup. Users can select the name to add it to the donor letter. When the report is generated, the name specified in the Name field appears in the signature line of the donor letter.

Inserting the Signer's Printed Name into a Donor Letter

Follow these instructions to insert the signer's printed name into the donor letter.

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the report setup, select the desired name from the **Printed Name** dropdown list.

   When you run the report, the selected name is printed under the signature in the donor letter.

Editing a Printed Name

If you need to make changes to the printed name, use follow the steps below. You can change the name of the option appearing in the **Printed Name** dropdown list in the report setup. You can also change the actual name that is printed under the handwritten signature on the donor letter.

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙. From the displayed menu, select this option: ▤ Contents.

3. Complete the following:

   a) On the **Statements** tab in the **Printed Name** section, select the name you want to change from the **Printed Name** dropdown list.

   b) Click ✎ . Then, edit one or both of the following:

     ❖ **Title**: the option shown in the **Printed Name** dropdown list.

     ❖ **Name**: the printed name appearing under the handwritten signature in the donor letter.

   c) Click **Save** to save the change.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Removing a Printed Name Option from the Printed Name Dropdown List

To remove a printed name that you no longer use, complete the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Contribution Detail Statement** option.

2. In the upper right, click this button: ⚙. From the displayed menu, select this option: 🗏 **Contents**.

3. Complete the following:

    a) On the **Statements** tab in the **Printed Name** section, select the name you want to remove from the **Printed Name** dropdown list.

    b) Click ⛔.

        You are prompted to confirm the deletion.

    c) Click **Yes** to confirm.

        The system removes the option from the **Printed Name** dropdown list.

Funds

Added Ability to Manage Staff Permissions to Funds

Organization administrators can now manage each staff member's permissions to the organization's active funds. Here's how:

1. Display the **Funds** page.

2. In the upper-right corner, click this button: 🖳 (**Manage Permissions by Member**).

    The **Manage Permissions by Member** window opens. This window displays a list of all members with an active assignment in the organization and a list of the organization's active funds.

3. For each member you want to grant fund permissions to, complete the following:

    a) In the **Members** list, select the member's name.

        The **Funds** list shows the funds the selected member currently has permission to access.

    b) Do the following:

        ❖ To grant the member access to more funds, select the checkbox next to each additional fund. To give the member access to all funds, click **Select All**.

        ❖ To remove permissions to a fund, deselect the fund's checkbox (to remove the checkmark).

    c) Click **Save** to save your selections.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Resolved Issues

Reports

Fixed: XLS Versions of the Donor List and Parish Master Reports Missing Giver Details

Giver details were previously missing from the XLS versions of the **Donor List** and **Parish Master** reports. We fixed this issue. Both reports now include giver details.

Fixed: Pledge Details Report Sometimes Missing Pledge Data

Previously generating a **Pledge Details** report for a pledge that had no contributions associated with it produced a blank report. This will no longer happen. Even if a pledge has no contributions associated with it, the **Pledge Details** report will include all data associated with the pledge and indicate that the pledge currently has no posted contributions.

Imports

Fixed: Error During Import of Online Giving File with Multiple Batches of Pledges

We resolved an issue that caused the user to experience an error when attempting to import an Online Giving file containing multiple batches of pledges. The file import now completes successfully.

Fixed: System Allows the Import of Pledge Records with Invalid Family IDs

Previously, the lockbox process allowed pledge records with invalid Family IDs to be imported into Development Manager. We resolved this issue.

Fixed: Duplicate Pledge Error Sometimes Experienced During Import of Pledge Lockbox

Previously when attempting to import lockbox pledge records, the system sometimes generated the following error:

`A similar pledge appears to exist in the import file already`

We found and fixed the cause of this error.

ParishSOFT Version 1.4 Release Notes_last updated August 17, 2020

Batches

Fixed: Require Pledge (Handshake) Icon Sometimes Incorrectly Activated for a Fund

Previously in batch contribution posting when the user set the **Default Donor Lookup** setting to **Pledge ID** and entered a pledge ID in the **Lookup ID** field that was not associated with the current default fund, the system incorrectly tagged the donor (with the handshake icon) as having an active pledge to the default fund when, in fact, the donor did not. This issue was resolved.

Contributions

Fixed: Funds List Incorrectly Populated for Multi-Contribution Edit

Previously if the contributions selected for multi-editing were associated with different funds, the **Funds** dropdown list incorrectly contained a mix of funds when it should not have. As a result, users were prevented from selecting the same fund for all contributions. We resolved this issue as follows:

- When multi-editing, if the user selects contributions associated with different funds, the Funds dropdown list is now disabled to prevent the fund from being changed.

- When multi-editing, if the user selects contributions associated with the same fund, the Funds dropdown list is enabled to allow the fund to be changed.

Contacting ParishSOFT

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

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