



PARISHSOFT DEVELOPMENT MANAGER v1.5 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v1.5 of ParishSOFT Development Manager.

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What's New in Version 1.5

Reports

Appeal Progress Report Added to Diocese Reports

We added a new report to the **Diocese Reports** group, called **Appeal Progress**. The **Appeal Progress** report presents data for three user-specified funds. For each fund and for the same period, the report shows the amount given to the current annual appeal and to the two prior appeals (last year and the year before last). An organization can use this data to track fundraising success by comparing current results against previously achieved results.

Message Added to Warn Users of Potential Delay in Processing Reports

When running any of the following reports, users will now be presented with a message warning them about a possible processing delay when they select 10 organizations or funds:

- Contribution History by Donor
- Contribution History by Fund
- Dollar Range
- Families Without Pledges Report
- Parish Summary Report

Imports

Lockbox Import for Pledges Updated to Accept Appeal Codes

We updated the pledge lockbox import process to read appeal code data, which is now required for appeals associated with a fund.

Funds

Checkbox Control Added to Allow Changes to a Fund's Active Status

We added a checkbox control, labeled **Fund is Active**, to the fund record. Use this checkbox to mark the status of a fund as active or inactive:

- If you are currently using a fund, you should mark it as active. To do this, select the **Fund is Active** checkbox, as shown in the following illustration:



The screenshot shows a form with three input fields. The first field is labeled 'Name *' and contains the text 'Capital Campaign'. The second field is labeled 'Account Number *' and contains the text 'CapCampgn-Unspec'. The third field is a checkbox labeled 'Fund is Active', which is checked and highlighted with a red border.

- If you are no longer using a fund, mark it inactive by selecting the checkbox (to remove the checkmark). After you mark a fund inactive, it no longer appears in the lists in these areas:
 - ❖ Batches > Batch Filter
 - ❖ Pledges > Pledge Filter
 - ❖ Reports > Parish Reports
 - ❖ Reports > Donor Reports (if "All Funds" is selected, reports include data from inactive funds)
 - ❖ Batch > Batch Details (edit fund)
 - ❖ Contribution: Contribution Details (edit fund)

On the other hand, after you make a fund inactive, it continues to appear in lists in these areas:

- ❖ Reports > Other > Audit Reports
- ❖ Funds

Mandatory Code Field Added to the Appeal Record

The **Appeals** tab in the fund record lists the appeal records associated with a given fund. In this release, we added a **Code** field to the appeal record. This field stores the appeal code, an ID that uniquely identifies the appeal in your database. Keep the following points in mind when working with appeal codes:

- If an appeal was migrated from DDM, the system automatically inserts the old Appeal DUID value into the **Code** field. You can edit this value if desired.
- The **Code** field is mandatory. When adding a new appeal, you must enter a value in the field. The field accepts up to five alphabetic and numeric characters. Blank, null, and spaces are not allowed.

Batches

Default Donor Lookup Menu Now Includes Family Last Name and Member Last Name Options



As shown in the illustration below, **Family Last Name** and **Member Last Name** were added to the default **Donor Lookup** menu on the **DM Batches > Postings** page.



When conducting searches, users can now select the desired default lookup value and then enter text in the Lookup field to find donors that match their search criteria.

Family ID Column Added to Contribution Posting Page

Previously, the batch posting page for contributions included the name of the family but not the family ID. Per customer request, we added the **ID** field to the posting page, as shown in the following illustration, to show the family ID:

Donor Type	ID	Name	Amount	Ck #	Pledge
 	247644	abbott, Abraham	\$5,000.00		<input type="checkbox"/>

Pledges

Fields in the Full Address Now Split into Separate Columns in XLS Export File

In the XLS export file for pledges, the following fields of the full address are now separately stored in the following columns:

- **Address**
- **City**
- **State**
- **Zip**

Contributions

Process for Bulk-Editing Contributions Enhanced

The following enhancements were made to the bulk-edit process to ensure that when the user changes the fund for multiple contributions, contributions to funds are then associated with the right pledge:

- If a donor makes a new contribution to a fund for which he or she has an existing pledge, the contribution is associated with that pledge.
- If a donor makes a new contribution to a fund for which he or she has multiple pledges, the contribution is associated with the most recent pledge.
- The bulk-edit process differentiates between family and member pledges. If a family makes a new contribution to a fund that has both family and member pledges, the contribution is associated with the family pledge—not the member pledge.
- If a contribution to a fund has no matching pledges, it is not associated with a pledge.

Label on Posting Date Field Revised for Clarity

For clarity, the input field in the contribution record that was previously labeled "Posting Date" is now labeled "Contribution Date." Note the following:

- The **Contribution Date** field is an input field for users to record the date a contribution was given.
- The **Posting Date** field is a non-editable field that shows the date a contribution was entered into the system.

Resolved Issues

System-Wide

Fixed: System Pulls Family Name from Wrong Field in Family Details

Previously when displaying family names in fields throughout the application, the system pulled names from the **Informal Salutation** field in **Family Details** instead of from the **First Name(s)** field. We corrected this issue, which affected fields in the following areas:

- DM Pledges
 - ❖ Add Pledge
 - ❖ Pledge Details
 - ❖ Pledge List
- DM Contributions
 - ❖ Contribution Details
 - ❖ Contribution List
 - ❖ Lifetime Giving
- DM Batches
 - ❖ Batch Pledge Posting (open/review batch/closed batch)
 - ❖ Batch Contribution Posting (open/review batch/closed batch)

Fixed: Active Organization Sometimes Switches to a Parish Organization

Some Diocesan Admin users reported that the active organization sometimes switched to a parish organization. As a result, users could not access parish reports. We fixed this issue. Unless changed by the user, the active organization now remains set to the diocese.

Reports

Fixed: Some Organizations Missing from the Parish Summary Report

We resolved an issue that caused the names of some organizations to be missing from the Parish Summary report. We fixed this issue.

Imports

Fixed: Lockbox Import Contains Contributions Outside Pledge Date Range

Previously, the lockbox import process allowed contributions outside the valid pledge date range to be imported into Development Manager. Users will no longer experience this issue. If any contributions are outside the valid pledge range, they are not imported. Additionally, a message is displayed informing users why the import failed.

Fixed: Lockbox Import Contains Contributions Outside Fund Date Range

Previously, the lockbox import process allowed contributions outside the valid fund date range to be imported into Development Manager. Users will no longer experience this issue. Any contributions outside the valid fund date range will not be imported. Additionally, a message is displayed informing users why the import failed.

Fixed: Online Giving Summary Report for Pledge Imports Not Matching Import File

Previously if the import file containing Online Giving pledges contained multiple funds, the summary report was incomplete and did not match up with the content of the import file. We fixed this issue.

Batches

Fixed: System Prevents User from Editing an Initial Contribution

Previously, users experienced the following error when attempting to save an edit to an initial contribution associated with a pledge:

```
Batch Contribution Not Valid
```

We fixed this issue.


Pledges

Fixed: Pledge Export File Missing Pledges That Have No Contribution

We resolved an issue that caused the pledge export file to be missing pledges that had no contributions.

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)