



## PARISHSOFT DEVELOPMENT MANAGER v1.6 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v1.6 of ParishSOFT Development Manager.

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## What's New in Version 1.6

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### Reports

#### Family Group Filter Added to Pledge Statement Report

The Pledge Statement Report now features a Family Group filter. This filter lets you generate pledge statements for specific family groups. To specify which groups to include in the report, select the checkbox next to the name of the family group.

#### Filters and Options Added to Contribution Detail Statement

The setup for the Contribution Detail Statement report features three new filters to let you more precisely specify the type of data to include in your donor statements:

- **Report Type** Filter

This filter lets you choose the types of contributions to include in your statements:

- ❖ **All Details:** lists the dollar amount of all contributions made to selected funds.
- ❖ **Details for \$250:** only includes details for contributions of \$250.00 or more.
- ❖ **Fund Totals Only:** shows the dollar amount of contributions made to each fund.

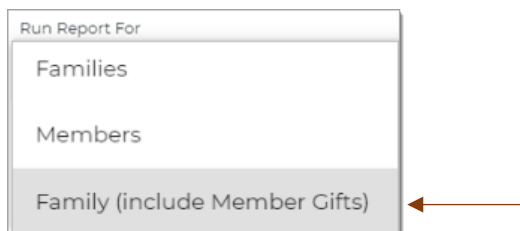
- **Maximum Amount** Filter

This filter lets you set a maximum amount for contributions to include in the report.

- **Family Group** Filter

This filter lets you generate contribution detail statements for specific family groups. Select the checkbox next to the family groups you want to include in the report.

As illustrated below, a new option labeled **Families (include Member Gifts)** was added to the **Run report for** dropdown list. Select this option when you want statements in the report to include contributions linked to the family and individual family members.



## Canadian Tax Receipt Report Added

In this release, we added a new report called Canadian Tax Receipt. This report enables Canadian customers to create tax receipts for donors that itemize their contributions during a given period. The receipts comply with the Canada Revenue Agency requirements regarding the information that must be included on an official tax receipt.

## Configuring Elements of a Canadian Tax Receipt Report

The Canadian Tax Receipt Report provides several elements that can be configured as needed to customize your organization's tax receipts and make them look more professional and visually appealing. Configuration of these elements is entirely optional, so you can skip them and produce tax receipts that meet donors' needs.

The configurable elements of the Canadian Tax Receipt report are listed below. Each list item contains a link to a section later in this document that provides instructions on how to configure it. The configuration creates the options that users can select when setting up the report.

- [Letterhead](#)
- [Body of Statement](#)
- [Body Signature and Receipt Signature](#)
- [Printed Name](#)

### Letterhead

If desired, you can insert a custom letterhead at the top of your donor letters. Adding a letterhead to your correspondence can give it a more finished and professional look.

This section first describes the specifications to follow when creating a letterhead file and then shows you how to configure an option for the letterhead that is available for users to select when setting up a Canadian Tax Receipt report.

### Letterhead Specifications

If you plan to insert a letterhead graphic, keep the following in mind:

- 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.

## Configuring a Letterhead Option



### Note

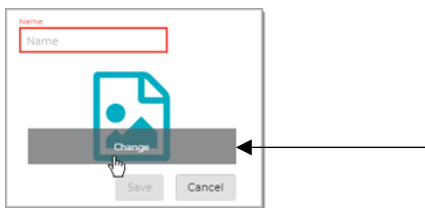
*The procedure below is intended only for users who want to add a letterhead graphic to their donor letters. If you do not plan to insert a graphic letterhead or if you want to insert a letterhead that only consists of your organization's name and address, skip this procedure.*

In the setup for the Canadian Tax Receipt, letterhead options are stored in the **Letterhead** dropdown list. To make a letterhead graphic available for a user to insert into a donor letter, you must first add an option for it in 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 **Canadian Tax Receipt 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 .

The system adds the graphic file to the **Letterhead** dropdown list. Users can now select the file when creating a Canadian Tax Receipt Report.




### Note

*Functions in the report configuration enable you to manage options in the **Letterhead** dropdown list. For details, see "Managing Letterhead Dropdown Lists" on page 9.*

## Body of Statement


The Body of Statement is the text of the note or letter thanking donors for their gifts. You can create up to five versions of body of statement content and save each version as a template that users can select when creating a report. 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.

For each Body of Statement that you want to create, complete the following:

1. Display the **Donor Reports** page. From the **Select a Donor Report** dropdown list, select the **Canadian Tax Receipt Report** 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 .

The system saves the template and adds it to the **Body of Statement** dropdown list for users to add to reports.

*Note*

*Functions in the report configuration enable you to manage body of statement text and options in the **Body of Statement** dropdown list. For details, see "Body of Statement Options" on page 10.*

## Body Signature and Receipt Signature

If desired, you can insert an image of a handwritten signature in the signature area at the bottom of a donor letter. You can also insert a signature on the tax receipt itself to affirm that the receipt is accurate. A handwritten signature is recommended because it adds a personal touch and gives your letters and receipts a more professional look.

This section describes the specifications to follow when creating a signature image file and then shows you how to create an option for it in the report configuration. After the option is created, it is available for users to select when setting up a Canadian Tax Receipt report

### Creating a Signature File

Before you can insert a signature image into a tax receipt, you must create the 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.

### Configuring a Signature Image

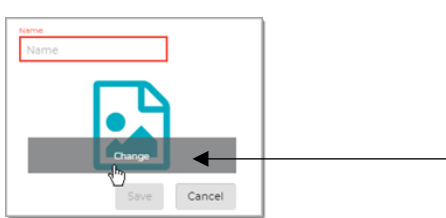
In the setup for the Canadian Tax Receipt Report, signature images are stored in the **Signature** dropdown list. To make a signature image available for a user to insert into a donor letter, you must add it to this dropdown list. The instructions below show you how to do this.

#### *Note*

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

1. Display the **Donor Reports** page. Then, select the **Canadian Tax Receipt 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.

- 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 .

The system adds the image file to the **Signature** dropdown list. Users can now insert the signature image into donor letters and include it on tax receipts.

*Note*




*Functions in the report configuration enable you to manage options in the **Signature** dropdown list. For details, see "Body Signature and Receipt Signature Options" on page 10.*


## Printed Name

The printed name is simply the typed form of the name of the person who signs the letter accompanying your tax receipts. If your 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 create an option in the report configuration for the signer's printed name. After you add an option for a name, users setting up a report can select it and insert it into the donor letter.

*Note*

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

1. Display the **Donor Reports** page. Then, select the **Canadian Tax Receipt 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**).
  - b) In the **Title** field, type a label for the printed name option. This label is what users see in the **Printed Name** dropdown list.


- c) 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.
- d) Click .

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.

*Note*

*Functions in the report configuration enable you to manage options in the **Printed Name** dropdown list. For details, see "Printed Name Options" on page 11.*

### Creating a Canadian Tax Receipt Report



1. On the **Home** page, open the Donor Reports page.
2. In the **Donor Report** dropdown list, select the **Canadian Tax Receipt Report** option.
3. Set up the report. Select options for the following:
  - **Fund**
  - **Run Report for**
  - **Start Date**
  - **End Date**
  - **Minimum Amount**
  - **Letterhead** (if Letterhead options are configured, select one.)
  - **Body of Statement** (if **Body of Statement** options are configured, select one.)
  - **Body Signature** (if **Signature** options are configured, select one.)
  - **Printed Name** (if **Printed Name** options are configured, select one.)
  - **Receipt Signature** (if **Signature** options are configured, select one.)
4. To generate the report, click . From the displayed menu, select the desired report type option: **Excel** or **PDF**.



## Managing Dropdown Lists in the Setup for the Canadian Tax Receipt Report

From time to time, you may need to change the name of a dropdown list option or, if never used, remove one from a dropdown list. The instructions in this section show you how to manage options in the dropdown lists in the report setup.

All dropdown list options are managed on the **Report Contents** menu. To access this menu:

1. Display the **Donor Reports** page.
2. In the upper right, click this button: . From the displayed menu, select this option:  **Contents**.



The **Report Contents** menu lists the options that you can change for the five elements of the report.

3. Instructions for changing dropdown list options follow. Use the links in this list to quickly jump to the section in this document that provides the instructions you need:
  - [Letterhead options](#)
  - [Body of Statement options](#)
  - [Body Signature and Receipt Signature options](#)
  - [Printed Name options](#)

### Letterhead Options

#### Changing the Name of a Letterhead Option



To change the name of an option in the **Letterhead** dropdown list, do the following:

1. On the **Statements** tab in the **Letterhead** section, select the option you want to rename from the **Letterhead** dropdown list.
2. Click . Then, in the **Name** field, type a new name for the option.
3. Click  to save the change.

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

#### Deleting a Letterhead Option



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

1. On the **Statements** tab in the **Letterhead** dropdown list, select the option you want to remove.
2. Click .
3. You are prompted to confirm the deletion. Click  to confirm.
4. 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.

## Body of Statement Options

### Editing the Text in a Body of Statement Template



To make text changes to an existing body of statement template, complete the following:

1. 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.
2. The selected template's text is displayed.
3. Click . Then, edit the text as desired.
4. When done, click .

The system updates the template with your changes.

### Deleting a Body of Statement Template

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



1. 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.
2. Click .
3. You are prompted to confirm the deletion. Click  to confirm.

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

## Body Signature and Receipt Signature Options

### Changing the Name of a Body Signature and Receipt Name Option



To change the name of an option in the **Body Signature** and **Receipt Signature** dropdown lists, do the following:

1. On the **Statements** tab in the **Signature** section, select the option you want to rename from the **Signature** dropdown list.
2. Click . In the **Name** field, type a new name for the option.
3. Click  to save the change.

The system updates the name of the option in **Body Signature** and **Receipt Signature** dropdown lists.

### Deleting a Body Signature Option

To delete an option from the **Body Signature** and **Receipt Signature** dropdown lists, do the following:



1. On the **Statements** tab in the **Signature** section, select the option you want to delete from the **Signature** dropdown list.
2. Click .
3. You are prompted to confirm the deletion. Click  to confirm.

The system deletes the option from the Body **Signature** and **Receipt Signature** dropdown lists. Note that the actual signature image remains on your computer so that you can add it again later, if desired.

### Printed Name Options



#### Changing the Name of a Printed Name Option

To make changes to a printed name, follow the steps given below. You can make changes to the following:

- The name of the option appearing in the **Printed Name** dropdown list
  - The name that is printed under the handwritten signature on the receipt.
1. On the **Statements** tab in the **Printed Name** section, select the name you want to change from the **Printed Name** dropdown list.
  2. 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.
  3. Click  to save the change.

#### Deleting a Printed Name Option

To delete an option for a printed name you no longer use, complete the following:

1. On the **Statements** tab in the **Printed Name** section, select the name you want to remove from the **Printed Name** dropdown list.
2. Click .
3. You are prompted to confirm the deletion. Click  to confirm.

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

## Voiding a Tax Receipt

If you create a tax receipt that is no longer valid, you can void it. Follow these steps:

1. Open the **Donor Reports** page.
2. Select the **Canadian Tax Receipt Report** option.
3. Click  to open the **Canadian Tax Receipt Summary** window.
4. At the top of the window, use the filters to locate the desired receipt.  
The system displays receipts matching your filter criteria in the Results section.

5. To the left of the desired receipt, click this button to void it: .

6. Confirm the action to void the receipt by clicking .

The status of the tax receipt now shows as **Voided** (a checkmark is displayed in the **Voided** column).

## Creating a Tax Receipt Summary Report

The **Canadian Tax Receipt Summary Report** lists the tax receipts issued by the logged-in user's organization. The report also includes voided receipts so that an organization, if audited, can use the report to account for all receipt numbers. Each receipt listed in the report shows the following:

- Family Name
- Receipt Issued Date
- Receipt Amount
- Fund Name
- Receipt Start Date
- Receipt End Date
- Voided?

To create a Tax Receipt Summary report, complete the following:

1. Open the **Donor Reports** page.
2. Select the **Canadian Tax Receipt Report** option.
3. Click  to open the **Canadian Tax Receipt Summary** window.
4. At the top of the window, use the filters to select your search criteria.

The system extracts tax receipts matching your search criteria and lists them in the Results section. The list includes issued and voided tax receipts.

5. To export the report, click . Then, select the **PDF** or **Excel** option.

## Pledge Option Added to Contribution History by Donor Report

The **Contribution History by Donor Report** now features a **Pledge** option. If selected, the **Pledge** option enables you to obtain a historical view of pledges made by donors over the specified four-year period. You can export the report as a PDF or an XLS version.

## First Name and Last Name Columns Added to Families Without Pledges Report (Excel)

Per customer request, the Excel version of the **Families Without Pledges Report** now includes a **First Name** and a **Last Name** column.

## Bar Graph Labels in Donor List Report Modified to Improve Readability

In the PDF version of the **Donor List Report**, we modified the labels on the bar graph to improve the readability of the text.

## Excel Version of All Parish Summary Report Shows Data on Two Sheets

Data in the **All Parish Summary Report** is now presented on two sheets. Each sheet displays data in a specific format:

- **Sheet 1:** converts data into a bar graph to enable users to visually compare data. Also includes basic descriptions to summarize the data in the graph.
- **Sheet 2:** converts data into a table in which the data is displayed in a grid format of columns and rows. This sheet can be used as the data source for mail merge.

## Imports

### Integration with Legacy Online Giving Added

Development Manager is now integrated with Online Giving. This capability enables organizations to import their Online Giving contribution and pledge data directly into Development Manager without using an import file.

Development Manager conducts validation checks on elements in each imported record to ensure that the data you are working with is accurate. If the process identifies any errors, it will not import any pledges or contributions. If a specific record fails to import, it is marked with an error to help you troubleshoot the problem. After an import, the process provides an import summary that shows the status of the import, the date and time of the import, and the name of the batch containing the records.

To import contribution and pledge records:

#### *Note*

*If your organization uses Online Giving but you do not see the **Integration** option on the **Imports** menu, contact ParishSOFT Support for assistance. For ways to contact Support, see "Contacting ParishSOFT" on page 17.*

1. On the **Home** page, open the **Imports** menu and select the **Integration** option.
2. Enter the date range for the contributions and pledges you are importing.

3. Click **Review**. Then, review the details of the batch.
4. When ready to import, click **Finalize**.
5. To view the details for each successful Online Giving file import, select the **Import History** tab

### Detailed Summary for Online Giving Data Imported Through API Added

After importing Online Giving contribution and pledge data through API, users can now view a detailed summary that lists errors encountered during the import process. Users can use the information to fix issues and attempt another import.

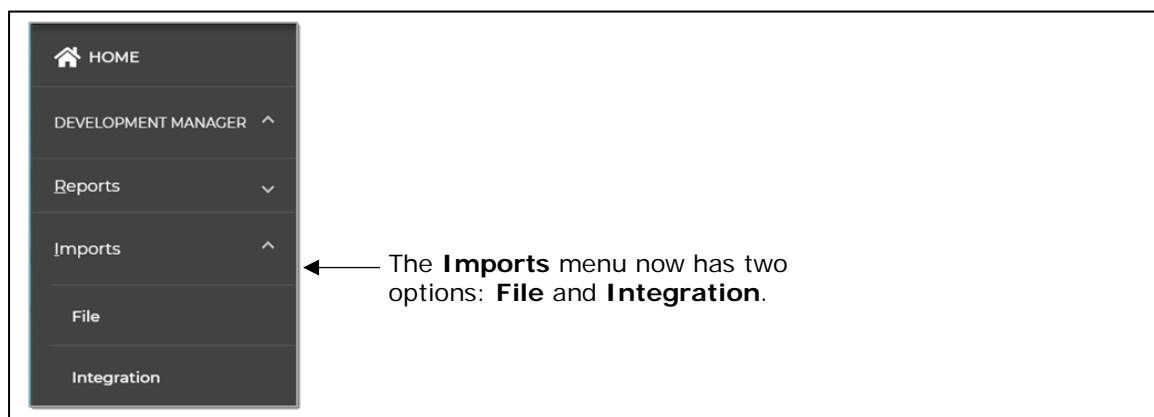
### Imports Menu Revised

As illustrated below, the **Imports** menu was revised. It now consists of two options, each representing the specific type of data that can be imported:

- **File**: opens the **File Import** page where you can import pledge and contribution records from your bank's lockbox file into Development Manager. The content of the **DM Lockbox Imports** was moved to this page.
- **Integration**: opens the **Integration Import** page where you can import pledge and contribution records from ParishSOFT's legacy Online Giving application into Development Manager.

*Note*

*If your organization uses Online Giving but you do not see the **Integration** option on the **Imports** menu, contact ParishSOFT Support for assistance. For ways to contact Support, see "Contacting ParishSOFT" on page 17.*



## Pledges

### Excel Version of the Pledge List Export Now Includes Current Pledge Amount

We added a column labeled **Current Pledge Amount** to the Excel version of the **Pledge List** export. This column shows the initial amount of the donor's pledge plus the amount of adjustments.

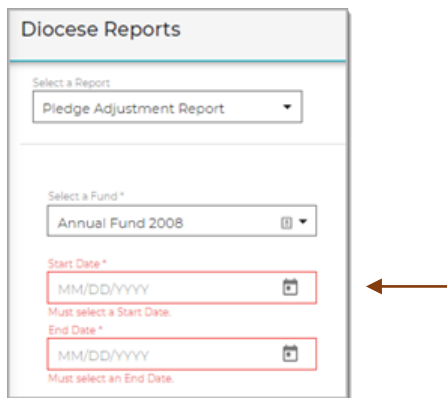
# Resolved Issues

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## Reports

### Fixed: Pledge Adjustment Report Missing Prompts for Required Date Fields

Previously, if the user did not enter a value into the required **Start Date** or **End Date** field in the setup for the **Pledge Adjustment Report**, the system did not prompt the user to fill in the missing value. We fixed this issue. As shown in the following illustration, if the user tries to export a report with an empty Date field, the system now prompts the user to supply a date:



The screenshot shows a web interface titled "Diocese Reports". It has a dropdown menu for "Select a Report" with "Pledge Adjustment Report" selected. Below it is another dropdown for "Select a Fund\*" with "Annual Fund 2008" selected. There are two date input fields: "Start Date\*" and "End Date\*", both showing "MM/DD/YYYY" and a calendar icon. Red boxes highlight these fields, with error messages below them: "Must select a Start Date." and "Must select an End Date.". A blue arrow points to the Start Date field.

### Fixed: Parish Summary Report Missing Data for Non-Parish Organizations

Previously, the **Parish Summary Report** was missing names and contribution data for non-parish organizations. We fixed this issue.

### Fixed: Date Errors in the All Parish Summary Report

We resolved issues that caused the following reports to show the wrong "as of" date in the header and the wrong "Printed on" time in the footer:

- **Donor List**
- **Parish Master**
- **All Parishes Summary**
- **All Parishes Refund Shortfall**
- **Periodic**

### **Fixed: Pledge List Report Shows Wrong Value in Last Contribution Amount Column**

Previously in the Excel version of the **Pledge List Report**, the **Last Contribution Amount** column showed the amount of the largest contribution when it should have shown the amount of the most recent contribution. We corrected this issue.

### **Fixed: Family ID Missing from Audit Report**

Previously, the **Audit Report** incorrectly included the **Env#** column and omitted the **FamilyID** column. We fixed this issue by replacing the **Env#** column with the **FamilyID** column.

### **Fixed: Donors with Same Last Name Not Sorted Correctly by First Name**

We resolved a sort issue in the **Parish Master** report that caused families with the same last name to be alphabetized incorrectly by first name.

## **Funds**

### **Fixed: Organization with Type Cathedral Can Now Be Assigned Goals**

The system was updated to enable users to assign goals to organizations of type Cathedral.

## **Batches**

### **Fixed: Memo Field in of PDF Version of Batch Posting Report Pushed to Next Page**

We resolved an issue that caused the **Memo** field in the PDF version of the **Batch Posting Report** to be pushed to the next page. All sections of the report now fit on a single landscape page.

## **Settings**

### **Fixed: Lookup Tab Not Visible to Users with Diocesan Admin Access**

We resolved an issue that prevented users with Diocesan Admin access from seeing the **Lookup** tab on the **Settings** page.



## Contacting ParishSOFT

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

	<a href="https://support.parishsoft.com">https://support.parishsoft.com</a>
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)