



PARISHSOFT DEVELOPMENT MANAGER V2.0 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.0 of ParishSOFT Development Manager.

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What's New in Version 2.0

Reports

Pledge Details Report Added to the Parish Reports Group

Note

*By default, the **Pledge Details** report is hidden from parish staff. A diocesan admin user can give parish staff access to this report on **Funds > Parish Reports** tab.*

The new **Pledge Details** report enables parish staff to view details of pledges made on behalf of their parish to a selected fund on behalf of their parish. To generate this report:

1. Open the **Parish Reports** page.
2. Select the desired fund.
3. Select the **Pledge Details** report option.
4. Set up the report by selecting a start date range for pledges and a Giving Source.
5. Click  to export the report.

Contribution Details Report Added to the Parish Reports Group

Note

*By default, the **Contribution Details** report is hidden from parish staff. A diocesan admin user can give parish staff access to this report on **Funds > Parish Reports** tab.*

The new **Contribution Details** report enables parish staff to view details of contributions made to the selected fund on behalf of their parish. To generate this report:

1. Open the **Parish Reports** page.
2. Select the desired fund.
3. Select the **Contribution Details** report option.
4. Set up the report by selecting the desired filter criteria.
5. Click  to export the report.

Added the Ability to Print Mailing Labels for Contribution Detail Statements

As shown below, a **Print Statement Labels** checkbox was added to the setup for the **Contribution Detail Statement** report. Simply select the checkbox to automatically generate an additional report containing mailing labels for selected families or members.



The mailing labels are designed to print on Avery 5160 label sheets.

New Non-Giver Letter Report Added

The **Donor Reports** group now features a new report, called **Non-Giver Letter**. This report lets you create a letter to send to lapsed donors and donors who have made no contributions. To generate this report:

1. Open the **Donor Reports** page.
2. Configure report options. To do this, click the **Configure** button in the upper-right corner: . When done, return to the **Donor Reports** page.
3. Select the **Non-Giver Letter Report** option.
4. Set up the report as desired.
5. Click  to export the report.

Contribution Detail Statements and Mailing Labels Now List Donors in Alphabetic Order

Previously, statements in the **Contribution Detail Statements** report were ordered by **Family ID**. The report now lists statements and mailing labels in alphabetic order by the family or member's last name followed by the first name.

Batches

Pledge Count and Contribution Count Fields in a Batch Now Optional

Previously for batches, both **Pledge Count** and **Contribution Count** were required fields (as indicated by an asterisk *). The system no longer requires you to enter a value into these fields, so the asterisk * was removed. If you leave either Count field blank, the system now displays two dashes (--) to indicate that no value was entered when the batch was created.

Pledges

Batch ID Added to Pledge Details

To help users identify the batch containing a pledge, we added the Batch ID to the pledge record. For each pledge in a batch, the Batch ID appears in parentheses to the right of the batch name, as illustrated below:



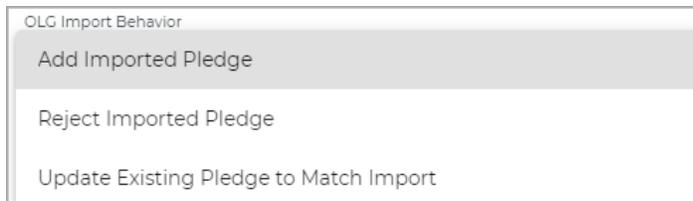
Settings

'Allow Multi-Pledge Import' Checkbox Removed

Because it was no longer needed, we removed the **Allow Multi-Pledge Import** checkbox from the **DM Settings** page. This setting was replaced with new options added to the **OLG Import Behavior** dropdown list (see next entry).

Import Process for Lockbox and Online Giving Contributions Enhanced

In this release, we removed the **Multi-Pledge Import** checkbox from the DM Settings page (see previous entry). We added the **OLG Import Behavior** dropdown list (see illustration below). Three settings in this dropdown list enable you to obtain finer control over how the system handles lockbox imports and contributions imported from Online Giving.



The following list describes the settings in the **OLG Import Behavior** dropdown list:

- **Add Imported Pledge:** the import process performs no validation checks for an additional active pledge. An active pledge is one with an end date that is either NULL or after today.
- **Reject Imported Pledge:** the import process checks for an additional active pledge associated with the same fund, family, and OBO organization. If a pledge matching this criteria is found, the process returns an error informing the user that an active pledge exists for the donor. An active pledge is one with an end date that is either NULL or after today.

- **Update Existing Pledge to Match Import:** the import process checks for an additional active pledge. If one is found, it compares the value in the **Adjusted Pledge Amount, Frequency, Fulfillment Method** fields. The process does the following:
 - ❖ If the values in the **Frequency** and **Fulfillment Method** fields do not match, changes the values in these fields in the existing pledge record to match those in the imported record.
 - ❖ If the value in the Amount field does not match, adds an adjustment so the adjusted amount matches the amount in the imported record.
 - ❖ Updates other fields in the existing pledge record, as necessary.
 - ❖ If a contribution is attached to the pledge, the contribution is posted to the existing pledge with the Initial Contribution checkbox deselected.

Resolved Issues

System-Wide

Fixed: Permission Error Experienced When Attempting to Open Development Manager

Previously when users tried to open Development Manager, they experienced the following error:

```
You are not authorized to view this application
```

We fixed this issue.

Reports

Fixed: City Column Missing from Contribution Detail Statement Export

We fixed an issue that caused the **City** column to be missing from the **Contribution Detail Statement** export. The column is now present in the report.

Fixed: Today's Date Always Shows All Parishes Summary Report Header

Previously, the **Fund Name as of ____** field in the **All Parish Summary** report header always displayed today's date even if the user specified a different end date in the report setup. We fixed this issue. The report now uses the user-specified end date.

Fixed: Report Totals Incorrect in the Parish Summary Report

Previously, the **Report Totals** line in the **Parish Summary** report incorrectly displayed the sum of the percentages instead of the actual percentage. We fixed this issue.

Fixed: Audit Report Missing Data for Modified Closed Batches

Previously, the Audit report was missing information about contributions and pledges added to the audit tables when a batch was. We fixed this issue.

Funds

Fixed: Fund Export Not Considering Filters

Previously, filters applied to the Fund list did not work as expected. An export of the Funds list returned all funds instead of a list matching the user's filter criteria. We fixed this issue.

Batches

Fixed: Hot Keys for Pledge Batch Entry Not Working As Expected

We resolved an issue on the **Postings** page that prevented the hot keys from working as expected. The following key combinations work as expected:

Note

When on the page, press ? to view this list of keyboard shortcuts.

- **CTRL-a**: opens a new pledge record.
- **CTRL-/** : moves the cursor to the **Amount** field under **Initial Contributions**.
- **CTRL-s**: saves a pledge.

Fixed: Batch Export Process Fails If Closed Status Filter Applied to Batch List

Previously, the user experienced a 400 Bad Request error if they tried to export a Batch List report to which the **Status > Closed** filter was applied. We fixed this issue.

Fixed: Batch Export Report Contains Duplicate Contribution Entries.

We resolved an issue that cause each batch listed in Batch Export report to contain a duplicate contribution entry. We fixed this issue.

Pledges

Fixed: Pledge Payments to a Pledge Listed in Random Order

Previously, multiple payments to a pledge were listed in random order. We fixed this issue. The pledges are listed in date order as expected.

Fixed: 'All Time' Contribution Filter for Lifetime Giving Displays Incorrect Results

Previously when users applied the **All Time** filter to Lifetime Giving contributions, the system incorrectly listed contributions for one month only. We fixed this issue.

Fixed: Error Sometimes Experienced When User Saves a New Pledge Record.

We resolved an issue that sometimes occurred after the user saved a pledge record to which details had been added and then cleared. We fixed this issue.

Fixed: OBO Field Missing Sometimes Missing Default Value

We resolved an issue that caused the default value in the OBO field to be missing if the **Donor ID** field contained a value.

Fixed: Incorrect Value Displayed in the Total Paid Column in Pledge List Export

Previously in both the Excel and PDF versions of the **Pledge List** export, the value in the **Total Paid** column was incorrect. We fixed this issue.

Fixed: Pledge List Export Contains Duplicate Pledges

We resolved an issue that caused duplicate pledge records to appear in the **Pledge List** export.

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)