PARISHSOFT DEVELOPMENT MANAGER V2.1 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.1 of ParishSOFT Development Manager.

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What's New in Version 2.1

Home

Home Page Interface Features Cards for Application Modules

ParishSOFT Family Suite is divided into separate modules. Each top-level module currently in the suite is now represented by a card on the **Home** page:

- **Development Manager**

  This card is visible only for dioceses licensed for Development Manager. Additionally, it is visible only to users that have an active assignment to the selected organization and one or more Development Manager access rights assigned to their staff user account.

- **Offering**

- This card will be visible to parish users after they begin using the updated version of ParishSOFT Offering. Additionally, it will be visible only to users that have **View** > **Offering** access rights assigned to their staff user account.

- **Settings**

  This card is visible only if the selected organization is licensed for Development Manager or Offering. Additionally, it is visible only to users that have Admin access rights to the selected organization.

A card functions as an entry point to the module. To access a module's features and functions, simply select the desired card.

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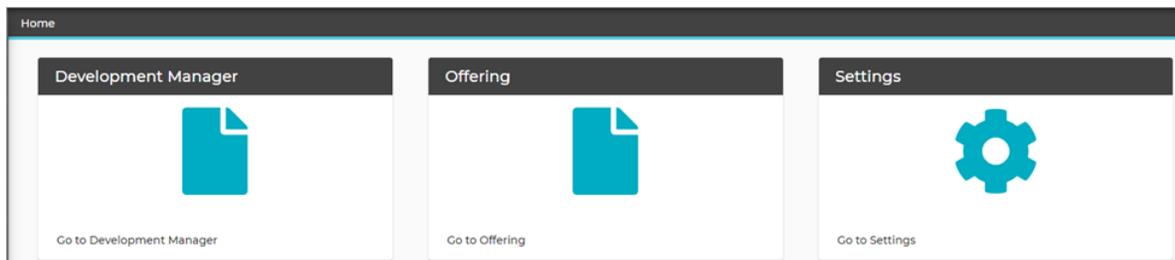
Reports

Pledge Overpayment and Unpaid Amounts Added to All Parishes Summary Report

As shown in the following illustration, pledge overpayment and unpaid pledge amounts now appear on the first page of the **All Parishes Summary** report.

- **Pledge Overpayment**: for the selected fund, shows the total dollar amount of payments made to that exceeded the pledged amount.

- **Unpaid Pledges**: for the selected fund, shows the dollar amount of money pledged but not yet received.

Pledge Overpayment and Unpaid Amounts Added to the Parish Master Report

As shown in the following illustration, pledge overpayment and unpaid pledge amounts now appear on the first page of the **Parish Master** report.

- **Pledge Overpayment**: for the selected fund, shows the total dollar amount of payments made to that exceeded the pledged amount.

- **Unpaid Pledges**: for the selected fund, shows the dollar amount of money pledged but not yet received.

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Batches

Added the Ability to Simultaneously Edit Multiple Contributions in a Batch

Per customer request, we added the ability to edit multiple contributions from the **Postings** page of any batch whose status is set to **Open** or **Review**.

To edit multiple contributions simultaneously, complete the following:

1. Open the **Batches** page.

2. Locate the batch containing the contributions you want to edit.

3. Click **:≡ Postings** .

    At the bottom of the batch record, a list of contributions in the batch is displayed.

4. Select the checkbox next to each contribution you want to edit.

5. In the upper-right corner, click ✎ (**Multi-Edit**).

    The **Contribution Details** page is displayed. The top of the page indicates the number of contributions you selected for editing.

6. In the **Edit Values** panel on the right, select the checkbox next to each field in the selected records that you want to modify. For example, if you want to change both the date and amount for the selected contributions, select the **Contribution Date** and **Amount** checkboxes.

    The selected fields are now activated, allowing you make the desired changes.

7. In the left panel, enter the desired information into each selected field. For example, if you are changing the contribution amount, type the new amount in the **Amount** field.

8. Click 💾 to save the changes.

9. You are prompted to confirm your changes. Do one of the following:

    *   Click **Yes** update each record with the change.

    *   Click **No** to cancel.

Added the Ability to Bulk Change the Status of Multiple Batches

The new Bulk Change Batch Status feature allows you to change the status of multiple batches in a single operation. For example, if you have a large group of batches that you want to close, you can use this feature to move them all to **Close** status at the same time.

IMPORTANT

The Bulk Change Status feature applies only to batches whose status is set to Open or Review.

Only balanced batches can be processed using this feature.

To bulk change the status of multiple batches, complete the following:

1. Open the **Batches** page.

2. In the upper-right corner, click to change the page to grid view.

3. Filter the list by batch status. To do this, select the desired status from the **Status** dropdown list in the right panel. Then, at the top of the panel, click .

   The Batch list refreshes, showing a list of batches that match the status you selected. For example, if you selected **Open**, the list includes open batches only.

4. Select the batches whose status you want to bulk change. To do this, select each batch's checkbox. You can select the batches individually. Or, as shown below, you can select all batches in the list by selecting the checkbox to the left of the **BatchID** header:

   Note

   Only balanced batches can be selected. The checkboxes next to batches that are not balanced are disabled to prevent selection.

5. Do one of the following:

   - If you selected **Open** batches, you see this button: . Click it to change their status to **Review**.

   - If you selected **Review** batches, you see this button: . Click it to change their status to **Close**.

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6. You are prompted to confirm the change. Do one of the following:

- Click to **Yes** confirm

- Click **No** to cancel.

The system places the batches in a queue to await processing. This button is displayed in the toolbar to let you know the job is being processed: ⚙.

Note

If the system encounters an error, you see this button: ⚙. Click the button to view details about the error.

7. To view current status of a job, click ⚙.

The **Batch Bulk Change Status** window opens to show the batches in the queue and their current status.

8. Click **Close** to close the window.

9. When processing is completed, the system removes the processing button ⚙.

Batch Search Capability Expanded to Allow Searches Using Batch ID

You can now search for batches by entering a **Batch ID** value into the Search field at the top of the **Batches** page.

To search:

1. Type the ID of the batch you are looking for into the Search field.

2. Click 🔍.

The batch matching the ID you entered is displayed in the Batch list.

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Resolved Issues

Funds

Fixed: System Allows the Duplicate Appeal Code Values

Previously, the system allowed the user to assign duplicate appeal codes to different appeals within the same fund. We fixed this issue.

Pledges

Fixed: Pledge Start Date Not Showing in Card and Grid Views of the Pledge List

We resolved an issue that prevented the pledge start date from showing in lists on the **Pledges** page. This issue affected lists in both the card view and grid views. We fixed this issue.

Fixed: Cannot Add or Move a Contribution to a Pledge

Previously in **Pledge Details**, the Add/Move functionality that enabled users to either add a contribution to an existing pledge or move a contribution from one pledge to another was not working as expected. We fixed this issue.

Fixed: System Allows Contributions to Be Posted to a Pledge After the Pledge End Date

Previously for pledges with an end date, the system incorrectly allowed users to post contributions after the end date. This issue occurred only if the user located the pledge through a search using the Pledge ID. We fixed this issue.

Contacting ParishSOFT

If you have questions or require support while using an 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)

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