PARISHSOFT DEVELOPMENT MANAGER V2.2 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.2 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.2

Development Manager

Reports

All Parish Summary with Groups Report Added

The **Parish Reports** group now includes a new report called **All Parish Summary Report with Groups**. Users can generate this report for the goal groups created on the **Goals** tab in the fund record.

Non-Giver Report Now Includes Families Registered to Any Parish in the Diocese

Users can now generate a **Non-Giver** report that includes letters for families registered to any parish in the diocese.

Batches

Pledge Check Feature Prevents Duplicate Pledge Entries to the Same Fund

When a new pledge is added, the system now checks to determine whether the giver already has a pledge to the selected fund. If the giver has an existing pledge to the fund, the system displays a message to inform you of the potential duplicate. Click the link in the message view details for the existing pledge. Use those details to determine whether the pledge you are entering is a duplicate.

OBO Column Added on Posting Page for Pledges

The pledge pop-up window (displayed by clicking the handshake icon in the giver's pledge record) now includes an OBO column. If the giver has pledges on behalf of multiple organizations, this column identifies the name of the organization the respective pledge is associated with.

Pledge ID and OBO Columns Added to Batch Posting List Export

Per customer request, we added the **Pledge ID** and **OBO** columns to the PDF and Excel versions of the **Batch Postings List Export**.

Contributions

Automatic Correction Batch Added

IMPORTANT

You cannot use the following procedure to correct errors for contributions that are attached to pledges. If you try to change a contribution attached to a pledge, the system displays an error message.

With the addition of the new Automatic Correction Batch feature, the process for correcting posting errors in a closed batch just got simpler and more efficient. After identifying the contributions with errors, simply make the appropriate corrections and save your changes. You are no longer required to create a correction batch. The system automatically creates one for you. The steps below walk you through the revised process:

1. Open the **Contributions** page.
2. Using the search or filter feature, find the contributions you want to correct.
3. Select the contribution records you want to edit. Then, click the **Create Correction Batch** button.
4. Do the following:
   a) The system creates the correction batch with a name and today's date. If desired, change the name of the batch and the date.
   b) In the **Edit Values** panel on the right, select the checkbox next to each field in the selected contribution records that you want to change. For example, if you want to change the date and contribution amount, select the **Contribution Date** and **Amount** checkboxes.

      The selected fields are now activated, allowing you to make the desired changes.
   c) In the left panel, enter the desired information into the activated fields. For example, if you are correcting the contribution amount, enter a value in the **Amount** field.
   d) Click to save the changes.

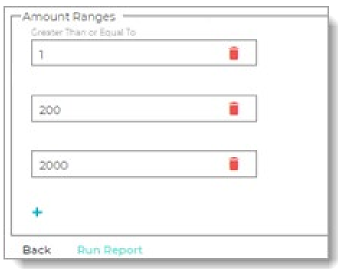
   The batch is added to the list on the **Batches** page, and the status is set to **Review**. You review and close the batch when desired.

Offering

Reports

Filter Label in Dollar Range Report Changed for Accuracy

When setting up a **Dollar Range** report, you may notice that we changed the label the identifies the field in which amount ranges are configured. The new label, **Amount Ranges**, is shown in the illustration below:



Batches

OBO Column Added on Posting Page for Pledges

We added an **OBO** column to the pledge pop-up window. This window opens when you click the handshake icon in the giver's pledge record. If the selected giver has made pledges on behalf of multiple organizations, this column identifies the name of the organization each pledge is associated with.

Pledge Check Feature Added to Prevent Duplicate Pledges to the Same Fund

When a new pledge is added, the system now checks to determine whether the giver has an existing pledge to the selected fund. If a pledge exists, the system displays a message to inform you of the potential duplicate. Click the link in the message to view details for the existing pledge. Use the details to determine whether the pledge you are entering is a duplicate.

Contributions

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   The batch is added to the list on the **Batches** page, and the status is set to **Review**. You review and close the batch when desired.

Resolved Issues

Development Manager

Imports

Fixed: Import History Tab Empty

Previously, **Import History** tab contained no log file entries. We fixed this issue. The tab now shows a log file for all previously imported lockbox and Online Giving files.

Fixed: System Rejects Files Imported from OLG That Contain Zero-Dollar ($0) Pledges

We resolved an issue that prevented the system from accepting files imported from Online Giving that contained zero-dollar ($0) pledges.

Reports

Fixed: Excel Version of the Contribution Detail Statement Report Missing Families

Previously when a **Contribution Detail Statement** report for all families was exported to Excel, statements for many families were missing. We fixed this issue. When configured to include all families, the Excel version now includes statements for all families that match other criteria specified in the report setup.

Fixed: Option Doesn't Belong in the Setup for Contribution Detail Statement Report

The **Include Donors with My Own Church** option was inadvertently included in the setup for the **Contribution Detail Statement** report. The option was removed from the setup for this report.

Fixed: Contribution History by Donor Report Missing Donors

Previously, a filter conflict caused some donors to be excluded from the **Contribution History by Donor** report. We fixed this issue. All donors matching the criteria specified in the report setup now appear in the generated report.

Batches

Fixed: Duplicate Transactions Appearing in the Posting Batch for Contributions

Previously when users posted contributions to a batch using the Family DUID, the system incorrectly added the contribution to the batch twice. We fixed this issue.

Fixed: Users Can Inadvertently Post a Contribution to the Wrong Family's Pledge

We resolved an issue that allowed users to inadvertently choose to post a contribution to the wrong family's pledge.

Pledges

Fixed: OBO Dropdown List in Pledge Details Missing Parish City

Previously, the **OBO** dropdown list in the pledge record was missing the city name for OBO parishes. We fixed this issue.

Offering

Reports

Fixed: Excel Version of the Contribution Detail Statement Report Missing Most Families

Previously when a **Contribution Detail Statement** report for all families was exported to Excel, statements for many families were missing. We fixed this issue. When configured to include all families, the Excel version now includes statements for all families that match other criteria specified in the report setup.

Fixed: Contribution History by Donor Report Missing Some Donor Records

Previously, a filter conflict caused some donors to be excluded from the **Contribution History by Donor** report. We fixed this issue. All donors matching the criteria specified in the report setup now appear in the generated report.

Fixed: Date Displayed in Header Section of Contributions Details Report Incorrect

We resolved the issue that caused the date displayed in the header section of the **Contribution Details** report to be a day later than the end date selected in the report setup.

Batches

Fixed: Transactions Sometimes Duplicated in the Posting Batch for Contributions

Previously when users posted contributions to a batch using the Family DUID, the system added the contribution to the batch twice. We fixed this issue.

Fixed: Contributions Sometimes Posted to the Wrong Family's Pledge

We resolved an issue that allowed users to inadvertently post a contribution to the wrong family's pledge.

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)