

ISIDORE V2.3 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.3 of ParishSOFT Isidore.

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What's New in Version 2.3

Development Manager

Reports

Added the Ability to Show the Parish ID on Reports

If your diocese is set up to use their own IDs to identify parish organizations (for details, see "[Option Added to Allow Dioceses to Use Their Own Organization ID to Identify Parishes](#)"), the system displays those IDs on the following reports:

- **Parish Master**
- **Designation Details**
- **Parish Date Over Goal**
- **Periodic Report**
- **Parish Roster**
- **Parish Refund/Shortfall**

Funds

Goals Import File Now Accepts Organization IDs Assigned by the Diocese

If your diocese is set up to use their own IDs to identify parish organizations (for details, see "[Option Added to Allow Dioceses to Use Their Own Organization IDs to Identify Parishes](#)"), the goal import file now accepts those IDs. Simply, enter the organization ID (instead of the ParishSOFT ID) into the **OrgID** field in the goal import file.

Batches

OBO Column Added to Pledge Pop-Up Window

The pledge pop-up window (displayed by clicking the handshake icon in the giver's pledge record) now includes an **OBO Organization** 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.

Contributions

Batch Auto-Correct Process Now Allows Corrections to Contributions Attached to Pledges

You can now use the batch auto-correction process to edit contributions attached to pledges.

Settings

Option Added to Allow Dioceses to Use Their Own Organization IDs to Identify Parishes

By default, Development Manager uses the ParishSOFT ID (a unique identifier assigned by the ParishSOFT system) to identify parish organizations. We added an option to the **Settings** page that enables a diocese to use their own local organization IDs instead.

Note

*Local organization IDs for parishes are set in **Diocesan Suite** > **Administration** > **Organizations**. The **Local Org ID** field in the each organization's record is where the value is saved.*

Here's how to make the switch:

1. Open the **Settings** page. Then, select the **Administration** tab.
2. In the **Organization ID** dropdown list, select the **Local Org ID** option:



3. Click  to save the change.

With this change, IDs assigned by the diocese now show on certain reports (for details, see "[Added the Ability to Show the Parish ID on Reports](#)").

Additionally, the IDs are now accepted in the file used to import goals (for details, see "[Goals Import File Now Accepts Organization IDs Assigned by the Diocese.](#)")

Offering

Contributions

Batch Auto-Correct Process Now Allows Corrections to Contributions Attached to Pledges

You can now use the batch auto-correction process to edit contributions attached to pledges.

Resolved Issues

Development Manager

Reports

Fixed: Recipient's Address for Contribution Statements Not Visible in Envelope Window

We fixed the issue that prevented the recipient's name from showing in the window of a #10 envelope.

Fixed: Overpayment Amount Incorrect in the All Parishes Summary Report

We resolved an issue that caused the amount in the **Pledge Overpayment** field in the **All Parishes Summary** report to be much higher than actual.

Fixed: Pledge ID Not Saved to Audit Report for Pledges

We fixed the issue that prevented the system from saving the Pledge ID to the **Audit** report for pledges.

Fixed: Blank Fields in All Parish Summary Report (Excel Version)

We fixed the issue that caused the **Pledge Overpayment** and **Unpaid Pledges** fields in the Excel version of the **All Parish Summary** report to be missing data.

Fixed: Audit Report Does Not Include Multi-Edit Changes to Contributions

The **Audit** report for contributions now includes changes made to contributions through the multi-edit process.

Fixed: Audit Report Does Not Include Pledges Added with Initial Contributions

The **Audit** report for contributions now records information for newly added pledges that are accompanied by an initial contribution.

Imports

Fixed: System Accepts Contributions Imported to Fund After the Fund End Date

Previously, the system accepted contributions in a lockbox import file that had a date after the fund end date. These contributions should have been rejected. We fixed this issue. If the import file contains a contribution with a date after the fund end date, the system rejects the contribution and displays this error message:

```
Contribution date after fund end date
```

Fixed: Lockbox Error: Receive error (date) must be after pledge date: (date)

Previously when users tried to post a contribution to a pledge that was imported through a lockbox file, the system generated this error if the contribution date and pledge date were the same:

```
Receive error (date) must be after pledge date: (date)
```

We resolved this issue. The system now accepts pledges having the same date as a contribution.

Fixed: Tax Status of Imported Contributions Is Set According Fund's Default Status

Contributions imported into Development Manager from Online Giving are now assigned the tax-deductible status of the fund they are directed to.

Fixed: Lockbox Import Process Changes Frequency Setting of Pledges

We resolved an issue that caused the lockbox import process to change the frequency settings of pledges in the import file to the default frequency of the fund the pledges were posted to.

Fixed: Lockbox Import Process Changes Pledge Installment Amount

We resolved an issue that caused the lockbox import process to change the installment amount for pledges in the import file to amount of the initial contribution amount.

Batches

Fixed: Contribution ID Not Saved to Audit Records

We fixed the issue that prevented the system from saving the Contribution ID to the audit record after the user performed the following actions:

- Added a contribution
- Edited a contribution
- Deleted a contribution
- Closed a batch

Fixed: Pledge ID Link on Batches > Postings Page Directs User to the Wrong Location

Previously on the **Batches > Postings** page, clicking the ID link for a pledge in a closed batch opened the **Home** page when it should have opened the **Pledge Details** page. We fixed this issue.

Fixed: System Will Not Accept Two Contributions Posted to the Same Pledge

We resolved an issue that prevented users from being able to post two contribution amounts to the same pledge.

Settings

Fixed: Lockbox Import Process Sometimes Doesn't Validate Fund ID

Previously when the **Allow Multiple Batches per Fund** checkbox on the **Settings** page was disabled, the lockbox import process allowed batches containing contributions posted to a different fund than the one identified for the batch to be successfully imported. We fixed this issue. If contributions in a batch have a Fund ID different from the Fund ID for the batch, the system generates the following error:

```
All contributions must be posted to the same fund.
```

Offering

Reports

Fixed: Recipient's Address for Contribution Statements Not Visible in Envelope Window

We fixed the issue that prevented the recipient's name from showing in the window of a #10 envelope.

Fixed: Pledge ID Not Saved to Audit Report for Pledges

We fixed the issue that prevented the system from saving the Pledge ID to the **Audit** report for pledges.

Fixed: Audit Report Does Not Include Multi-Edit Changes to Contributions

The **Audit** report for contributions now includes changes made to contributions through the multi-edit process.

Fixed: Audit Report Does Not Include Pledges Added with Initial Contributions

The **Audit** report for contributions now records information for newly added pledges that are accompanied by an initial contribution.

Imports

Fixed: Search Window Label for Online Giving Integration Imports Corrected

Previously the search window displayed when the user imported an anonymous contribution from Online Giving was incorrectly labeled "Lookup ID." For accuracy, we changed the window label to "Post anonymous contributions to the following record."

Fixed: Search-and-Match Process Using Envelope Numbers Finds Wrong Donors

Previously when the import process tried to match ParishSOFT Giving donors to their counterparts in ParishSOFT Family Suite based on the envelope number only, the system sometimes failed to find the correct family record. We resolved this issue.

Fixed: Tax Status of Imported Contributions Is Set According Fund's Default Status

Contributions imported into Development Manager from Online Giving are now assigned the tax-deductible status of the fund they are directed to.

Batches

Fixed: Contribution ID Not Saved to Audit Records

We fixed the issue that prevented the system from saving the Contribution ID to the audit record after the user performed one of the following actions:

- Added a contribution
- Edited a contribution
- Deleted a contribution
- Closed a batch

Fixed: System Will Not Accept Two Contributions Posted to the Same Pledge

We resolved an issue that prevented users from being able to post two contribution amounts to the same pledge.

Fixed: Pledge ID Link on Batches > Postings Page Directs User to the Wrong Location

Previously on the **Batches > Postings** page, clicking the ID link for a pledge in a closed batch opened the **Home** page when it should have opened the **Pledge Details** page. 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)