



PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.12 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.12 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.12

Development Manager and Offering

Sustaining Gifts Feature Added

What Are Sustaining Gifts?

Sustaining gifts are ongoing donations to a fund. They differ from pledges because they are considered “forever gifts” that never expire. Sustaining givers commit to donating a specific amount to a fund on a recurring basis, for example, monthly, quarterly, or biannually—with no end date. While such gifts are set up to continue forever, staff, at any time, can update a sustaining gift for a giver who wants to increase/decrease the gift amount, change the payment frequency, or cancel or modify their gift.

Sustaining gifts are a fundraising technique that can have immediate financial and long-term impact on a fund, providing it with a consistent, dependable revenue stream that can be used to sustain the causes it supports. Such gifts provide stability and can make it possible for an organization to make plans around the income they provide.

The next sections show you how to set up a fund to accept sustaining gifts and how to manage and process those gifts.

Who Can Set Up and Create Sustaining Gifts?

You must have the right level of access and permissions to set up and create sustaining gifts, specifically:

- You must have Organization Admin access rights to set up a fund to accept sustaining gifts.
- You must have Add/Edit permissions to add sustaining gifts to a fund.

Getting Started

This section shows you how to activate a fund to accept sustaining gifts and how to add sustaining gifts to the fund.

Setting Up a Fund to Accept Sustaining Gifts

Note

You must have Organization Admin access rights to perform this task.

1. Open the **Funds** page.

The page opens in card view. If you want to switch to grid view, click .

2. Find the desired fund. Do one of the following:

- Enter the fund name in the Search box in the toolbar. Then, click .
- If the Filter panel on the right is not visible, click this button to open it: . Next, enter one or more filter criteria. Finally, click  to display a list of funds matching your search criteria.

3. Click the fund's name link to open the fund record, as shown in the (card view) illustration below:



4. To enable the fund to accept sustaining gifts, do the following:
 - a) Select the **Fund Accepts Sustaining Gifts** checkbox.
 - b) Type an expiration date for reporting on sustaining gifts into the **Report on Sustaining Gifts up to** field. Alternatively, click  and select a date from the displayed calendar.

Note

*The system incorporates sustaining gifts into a fund's future projections. Your organization's pledge reports will use the date you specify in the **Report on Sustaining Gifts up to** field to estimate future revenue from recurring payments to the fund. Therefore, choose a date in the future that you expect the fund to stop accepting recurring gifts. Your pledge reports will stop projecting income from sustaining gifts after the date you specify.*

5. Click .

The fund is now ready to accept sustaining gifts.



IMPORTANT

You cannot add a sustaining gift to a fund that is set up to require pledges.

You cannot add more than one sustaining gift by the same donor to a fund.

You must have Add/Edit permissions to add a sustaining gift to a fund.

1. Open the **Pledges** page.
2. The page opens in card view. If you want to switch to grid view, click .
3. In the upper-right, click . From the displayed menu select the **Sustaining Gift** option to display the **Sustaining Gift Details** page.
4. Select the fund and donor type.
5. In the **ID** field, type the donor ID or use the search function to find the desired donor.
6. Complete the remaining fields in the sustaining gift form:

Note

An asterisk () indicates required information.*

- **Gift Date***: the date the donor makes the offer of the gift.
- **Gift Notes**: use this field to add details about the gift to aid with recordkeeping.
- **Start Date***: the date payments to the sustaining gift begin. Note that you can delay the start date by specifying a date in the future. Type the date into the field or click  and select a date from the displayed calendar.
- **End Date**: skip this field when adding a sustaining gift.

Note

*The **End Date** field is used to cancel a sustaining gift (for instructions, see "Canceling a Sustaining Gift" on page 7).*

- **Frequency***: the payment schedule. Select an option from the dropdown list to indicate how often the donor wants to make payments. Do not select **One Time Gift** or **Blank** as neither option applies to sustaining gifts.
- **Installment Amt***: fixed payment amount made at regular intervals as determined by the [Frequency](#) option selected.

- **Fulfillment Method** *: method used to pay for the gift, for example, credit card or check.
- **Statement Months**: select the checkboxes to indicate which months the system should generate statements for the donor. To select all months, click the **Select All** button.

7. Click .

The system saves the sustaining gift record and assigns it a Sustaining Gift ID. Gift payments will be processed automatically beginning on the start date specified and according to the [Frequency](#) option selected.

Managing Sustaining Gifts

Sometimes, at the donor's request, you may need to change the details for a sustaining gift or even cancel one. The following sections show you how to perform these and other management tasks.

Finding a Sustaining Gift and Viewing Its Details

Use either of the following methods to find a sustaining gift record and view its details.

Method 1

1. Open the **Pledges** page.
2. In the Search field at the top of the page, enter one of the following values:
 - ❖ Sustaining Gift ID
 - ❖ Family ID
 - ❖ Member ID
 - ❖ Family Name
 - ❖ Member Last Name

Then, click  to view a list of gift records that match your search criteria.

3. If your search yields multiple records, find the one you want. Then, click the [Pledge ID/Donor Name](#) link to open the record and view its details.

Method 2

1. Open the **Pledges** page.
2. If the Filter panel on the right is not visible, click this button to open it: . Next, select the desired filter criteria, making sure to select the **Sustaining Gifts, Pledges**, or **Both** option from the **Gift Type** dropdown list. Finally, click  to display a list of records matching your search criteria.
3. If your search yields multiple records, find the one you want. Then, click the [Pledge ID/Donor Name](#) link to open the record and view its details.

Deactivating the Sustaining Gift Feature from a Fund

If a fund no longer accepts sustaining gifts, you should deactivate the sustaining gifts feature. Here's how:



IMPORTANT

After you deactivate the sustaining gifts feature, the fund will not accept future sustaining gifts. The fund will, however, continue to accept payments from all active sustaining gifts.

1. Open the **Funds** page.
2. The page opens in card view. If you want to switch to grid view, click .
3. Find the desired fund. To do this, enter the name of the fund into the Search field at the top of the page or use the filters in the Filters panel to specify multiple search criteria.
4. Click the fund's name link, as shown in the illustration below, to open the fund record:



5. Select (to uncheck) the **Fund Accepts Sustaining Gifts** checkbox.
6. Click .

The fund stops accepting future sustaining gifts. Note that payments for all active sustaining gifts will continue to be processed by the fund.

Editing the Details for a Sustaining Gift

You can easily increase or decrease a donor's gift amount and change other details for a sustaining gift, such as the method used to fund payments for it. Here's how:

1. Open the **Pledges** page.
2. The page opens in card view. If you want to switch to grid view, click .
3. Find the sustaining gift record and open it. If you need instructions, see "[Find a Sustaining Gift and Viewing Its Details](#)" on page 5.
4. Make the necessary changes to the record.
5. In the **Reason** field (required), provide an explanation for the changes you made.
6. Click  to update the gift record with your changes.

Canceling a Sustaining Gift

If a donor informs you that they to cancel future payments toward a sustaining gift, do the following;

1. Open the **Pledges** page.
2. The page opens in card view. If you want to switch to grid view, click .
3. Find the sustaining gift record and open it. If you need instructions, see "[Find a Sustaining Gift and Viewing Its Details](#)" on page 5.
4. In the **End Date** field, enter the date you want to stop payments toward the gift.
5. In the **Reason** field (required), provide an explanation for the cancelation.
6. Click  to save the change.

Future recurring payments toward the gift are canceled and will stop on the end date specified.

Transferring a Sustaining Gift to a New Fund

The transfer feature is a helpful tool that staff can use to manage gifts from donors who commit to giving sustaining gifts to yearly fundraising appeals. The feature minimizes disruptions in giving by automating the transfer of recurring gift payments to a new fund or future version of an existing fund (for example, from **Bishop's Appeal 2021** to **Bishop's Appeal 2022**).

Note

You must have Organization Admin access rights to perform this task.

1. Open the **Funds** page.
The page opens in card view. If you want to switch to grid view, click .
2. Find the desired fund. Do one of the following:
 - Enter the name of the fund in the Search box in the toolbar. Then, click .
 - If the Filter panel on the right is not visible, click this button to open it: . Next, enter one or more filter criteria. Finally, click  to display a list of funds matching your search criteria.

3. Click the fund's name link, as shown in the illustration below, to open the fund record:



4. To transfer the fund's sustaining gifts to a different fund, complete the following:

- a) Click **Transfer Recurring Gifts**.

The **Move Sustaining Gift** window opens.

- b) In the **Move to Fund** dropdown list, select the target fund. Then, in the **Move on Date** field, type the date on which the gifts should be transferred, or click and select the transfer date from the displayed calendar.

You are prompted to confirm the move.

- c) Click **Yes, Move All** to confirm.

The system will move the sustaining gifts to the target fund on the date you specified.

[View Sustaining Gifts Data in Your Organization's Reports](#)

In this release, relevant Development Manager and Offering reports were updated to include information on sustaining gift amounts. For a complete list of reports, see "[Reports Updated to Include Sustaining Gifts Data](#)" on page 9.

Reports

Reports Updated to Include Sustaining Gifts Data

The reports listed below were updated to provide information on sustaining gift amounts for funds selected in the report setup.

Each report includes a line item showing the total amount received and projected from the fund's sustaining gifts. The amount expected from a sustaining gift is calculated based on the start date of the gift to the end date of the selected fund. For each recurring gift, the **Pledge Amount** field shows the amount expected from the start date up to and including the date selected.

- Development Manager
 - ❖ Diocese Reports
 - Appeal Progress
 - Audit
 - Contribution History by Donor (Pledge option)
 - Families Without Pledges
 - Parish Summary
 - Revenue Projection
 - ❖ Parish Reports
 - All Parishes Refund Shortfall
 - All Parishes Summary
 - All Parishes Summary (with groups)
 - Donor List
 - Parish Date Over Goal
 - Parish Master
- Offering Reports
 - ❖ Analysis
 - Contribution History by Donor (Pledge option)
 - ❖ Pledge
 - Donor List
 - Families Without Pledges
 - Pledges Past Due
 - ❖ Audit

Resolved Issues

Development Manager and Offering

Reports

Fixed: Report Generation Sluggish and Occasionally Times Outs

Users reported experiencing sluggish performance and occasional time-out errors when trying to generate some reports. We resolved these performance issues.

Imports

Fixed: Contribution Imported Through Lockbox Sometimes Missing from Batch

Some users reported that after importing a batch, they could not find one or more initial contributions after closing the batch. We fixed this issue.

Funds

Fixed: 'Add End Date' Search for Pledges Missing Some Pledges

Some users reported that the result set of an 'Add End Date' search for pledges was missing pledges that had the same start date as the date entered in **Start Date** field for the search. 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)