



# PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.16 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.16 of ParishSOFT Development Manager and Offering.

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## What's New in Version 2.16

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### Development Manager and Offering

#### Reports

##### [Audit Report Now Records Changes Made Through Batch Correction Process](#)

The **Audit** report now records changes made to batches through the batch correction process.

### Development Manager



#### Reports

##### [Parish Master One-Time Gifts Report Added](#)

Development Manager features a version of the **Parish Master Report** called **Parish Master Report: One-Time Gifts**. Use this report to view data for a specific fund's one-time gifts (pledges with a **One Time** frequency value).

By default, the **Parish Master Report: One-Time Gifts** report does not appear as an option on the **Parish Reports** menu. If you want to use the report, you must first add it to this menu. To do this, you must configure the **Parish Reports** setup for each fund you want to generate the report for.

Here's how:

1. Open the **Funds** page.
2. In the **Funds** list, find the desired fund. Select the fund's link to open Fund Details.
3. Select the **Parish Reports** tab.
4. In the reports list, find the **Parish Master Report: One-Time Gifts** option. Then, click this button to enable you to edit the option: .
5. Select the desired checkboxes to provide user-level access to the report.
6. Click  to save the change.

The **Parish Master Report: One-Time Gift** option is added to the **Parish Reports** menu. You can now select the fund and run the report.

The generated report is a modified version of the primary **Parish Master** report. The list below summarizes the differences:

#### Summary Page Column 1:

- **Goal:** no change.
- **Total Pledged:** no change.
- **Pledges Paid:** sum of
  - ❖ Contributions made to pledges with a pledge balance  $\geq$  \$0.00.
  - ❖ Total amount of pledges with a pledge balance  $<$  \$0.00.
- **Unpaid Pledges:** no change.
- **Unpledged Gifts:** equal to overpayments.
- **Total Paid:** sum of all contribution amounts (equals pledges paid + one-time gifts).

#### Summary Page Column 2:

- **Families:** no change.
- **Donors:** total number of families with pledges (equals pledges + one-time gifts).
- **Pledges:** count of pledges with a pledge total amount  $>$  \$0.00.
- **Unpledged Gifts:** count of pledges with a pledge total amount  $=$  \$0.00.
- **Pledges Outstanding:** count of pledges with a pledge balance  $>$  \$0.00.
- **Average Pledge:** average total amount of pledges with total amount  $>$  \$0.00.



#### Giver List:

**Overpayment** column: changed to **One-Time**. No change in calculation. If the **One-Time** column has an entry, the **Balance** column contains no value (blank).

## All Parish Summary One-Time Gifts Report Added

Development Manager features a version of the All Parish Summary report called **All Parish Summary: One-Time Gifts**. You can use this report to view data for one-time gifts (pledges that have a **One Time** frequency value).

By default, the **All Parish Summary: One-Time Gifts** report does not appear as an option on the **Parish Reports** menu. If you want to use the report, you must first add it to this menu. To do this, you must configure the **Parish Reports** setup for each fund you want to generate the report for. Here's how:

1. Open the **Funds** page.
2. In the **Funds** list, find the desired fund. Select the fund's link to open Fund Details.
3. Select the **Parish Reports** tab.
4. In the reports list, find the **All Parish Summary: One-Time Gifts** option. Then, click this button to enable you to edit the option: .
5. Select the desired checkboxes to provide user-level access to the report.
6. Click  to save the change.

The **All Parish Summary Report: One-Time Gift** option is added to the **Parish Reports** menu. You can now select the fund and run the report.

The generated report is a modified version of the primary Parish Master report. The list below summarizes the differences:

### Summary Page Column 1:

- **Goal:** no change.
- **Total Pledged:** no change.
- **Pledges Paid:** sum of
  - ❖ Contributions made to pledges with a pledge balance  $\geq$  \$0.00.
  - ❖ Total amount of pledges with a pledge balance  $<$  \$0.00.
- **Unpaid Pledges:** no change.
- **Unpledged Gifts:** sum of balances of pledges with a pledge balance  $< 0 \times -1$ .
- **Total Paid:** sum of all contribution amounts (equals pledges paid + one-time gifts).

### Summary Page Column 2:

- **Families:** no change.
- **Donors:** total number of families with pledges (equals pledges + one-time gifts).
- **Pledges:** count of pledges with a pledge total amount > \$0.00.
- **Unpledged Gifts:** count of pledges with a pledge total amount = \$0.00.
- **Pledges Outstanding:** count of pledges with a pledge balance > \$0.00.
- **Average Pledge:** average amount of pledges with total amount > \$0.00.

### Parish List:

- **Goal:** no change.
- **Total Pledged:** no change.
- **Pledges Paid:** sum of
  - ❖ Contribution amounts made to pledges with a balance >/= \$0.00.
  - ❖ Total amount of pledges with a pledge balance <\$0.00.
- **One-Time Gifts:** same as the **Overpayment** column.
- **Total Paid:** no change.
- **Unpaid Pledges:** no change.
- **# of Families:** no change.
- **# of Donors:** same as **# of Pledges** column.
- **# of Pledges:** count of pledges with a total amount > \$0.00.
- **Average Pledge:** average amount of pledges with total amount > \$0.00.

## Imports

### Size of Column J in Generic Import File Expanded

We expanded the size of Column **J** in the generic import file to make it wide enough to accept External ID values up to 40 characters long.

# Resolved Issues

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## Development Manager and Offering

### Batches

#### Fixed: Batch List Export Shows Fund Total for Subtotals by Contribution Type

Previously in the **Batch List** export, the summary information for a fund incorrectly reported the total amount given to the fund as the subtotal. We fixed this issue. The report shows the total amount given to the fund and now correctly breaks out the fund total into a subtotal for contributions paid in cash and a subtotal for contributions paid by check.

## Development Manager

### Reports

#### Fixed: Pledge Overpayments Show As Negative Values in Balance Column

Previously in the **Parish Master** and **All Parish Summary** reports, the **Balance** column showed a negative value to offset the amount shown in the **Overpayment** column. We fixed this issue. The **Balance** column no longer shows a negative offsetting amount and shows dashes (--) instead.

### Imports

#### Fixed: Import History Section Missing Files Imported from Online Giving

We fixed the issue that caused files imported from Online Giving to be missing from the list on the **Import History** tab.

#### Fixed: Batches Missing Contributions After Generic Import by DUID

Previously, the generic import process appeared to successfully import contributions by DUID, but the imported batch was missing contributions imported in that manner. We fixed this issue.



### Batches

#### Fixed: Contributions and Pledges Imported from Online Giving Show Wrong Date

We fixed the issue that caused all of the dates for contributions and pledges imported from Online Giving to be off by a day from the dates shown in the import file.

## Contacting ParishSOFT

If you have questions or require support while using an application, use any of the following methods to contact us:

	<a href="https://support.parishsoft.com">https://support.parishsoft.com</a>
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)