



PARISHSOFT DEVELOPMENT MANAGER AND OFFERING v2.17 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.17 of ParishSOFT Development Manager and Offering.

Table of Contents

What's New in Version 2.17	2
Development Manager and Offering	2
Reports	2
Resolved Issues	4
Development Manager and Offering	4
Reports	4
Imports	6
Contributions	6
Development Manager	6
Imports	6
Pledges	6
Contacting ParishSOFT	7



Development Manager and Offering

Reports

Enhancements Made to Canadian Tax Receipt Report

We made the following changes to the **Canadian Tax Receipt** report:

- Added Excel export option

You can now export data from the **Canadian Tax Receipt** report to an Excel file. To do this:



- 2) Select the **Excel** option from the displayed menu.

The system does the following:

- If there is data to export, downloads a spreadsheet with tax receipt information to your computer.
 - If there is no data in the export, the system displays this message: No Data Available.
- Reformatted receipts to fit address information in #10 envelope window
The mailing name and address of the donor is now entirely visible through the window of a #10 envelope. The address of the donor and church displayed in 11-point font.

Enhancements Made to Contribution Detail Statements

We made the following enhancements to the **Contribution Detail Statements** report:


- Fund totals now included in statements when **Report Type** filter is set to **Details for \$250**

The **Details for 250** option in the Report Type dropdown list lets you show the total amount the donor gave to each fund listed on the statement.

- Mailing name and salutation options added to the configuration for member statements

The configuration for Donor Reports now provides mailing name and salutation options for members. When creating member statements, you can now select one of four **Mailing Name Type** options for members in the **Report Contents** window, as demonstrated below:

The screenshot displays the 'Report Contents' window with three numbered callouts:

- 1** In the **Run Report For** dropdown list, select the **Members** option to indicate that you want to create member statements. The dropdown menu is open, showing 'Members' selected, with radio button options for 'All Members', 'Only Selected Members', and 'Member Id'.
- 2** In the upper-right corner, click  to open the **Report Contents** window. The **Mailing Name Type** dropdown list includes four mailing name and salutation options for members: 'Member Formal Mailing Name', 'Member Informal Mailing Name', 'Member Formal Salutation', and 'Member Informal Salutation'. Below the list, text instructs to 'Select the desired mailing name and greeting you want to use for your statements.'
- 3** The letter accompanying your generated statements shows the member's mailing name and salutation in the format selected. The example shows the address: 'Judah Buchanan, 226 South St, Colorado Springs, CO 80904' and the salutation: 'Dear Judah Buchanan,'.

Changes Made to Display of Mailing Names and Salutations in Pledge Statements

We made the following changes to the way mailing names and salutations are displayed in donor letters that accompany pledge statements:

- When you select **Formal Mailing Name** or **Formal Salutation**, the salutation displays the addressee's name accordingly, and the address block displays the formal mailing name.
- When you select **Informal Mailing Name** or **Informal Salutation**, the salutation displays the addressee's name accordingly, and the address block displays the informal mailing name.

Resolved Issues

Development Manager and Offering Reports

Fixed: Contribution Detail Statement Issues

The following issues with **Contribution Detail Statements** are resolved in this release:

- Non-cancelling contributions to the same fund on the same day not being totaled
Previously, multiple contributions made to the same fund on the same day were not being combined and shown as a single total. The system incorrectly listed each contribution as a separate line item. We fixed this issue. Multiple contributions made on the same day to a fund are now combined and reported as a single amount for the day.
- Configured signature data missing from **Signature** dropdown list
Users reported that signature options configured and saved in the Report Contents setup were not available for selection from the **Signature** dropdown list when creating Contribution Detail Statements. We fixed this issue.
- Cannot save edited **Body of Statement** text
Previously after users edited the text of an existing **Body of Statement** and then tried to save the changes, the system incorrectly displayed an `Already Exists` error. We fixed this issue. The system now allows users to make changes and save **Body of Statement** text.
- **Minimum Amount** filter in report setup not recognized
- Users reported that the **Minimum Amount** filter in the setup for the report did not work as expected. The report included statements with contribution totals less than the user-specified value for the minimum amount. We fixed this issue. Statements having a total less than the minimum amount no longer generate.
- Wrong **Body of Statement** text displayed after data migration
Some parishes reported that after their data was migrated to the redesigned Development Manager or Offering module, the wrong **Body of Statement** text appeared in the **Body of Statement** dropdown lists for their **Contribution Detail Statement** reports. We corrected this issue.

Canadian Tax Receipt Issues

The following issues with the **Canadian Tax Receipt** report are resolved in this release:

- **Fixed:** **Canadian Tax Receipt** reports missing selected **Body of Statement** text

We fixed the issue that prevented the **Body of Statement** text the user selected from appearing in letters in generated **Canadian Tax Receipt** reports.

- **Fixed:** Empty Canadian Tax Receipt statements do not inform the user that no data was found.

When no data is found for a statement in the Canadian Tax Receipt report, the system now informs the user by displaying this message: No Data Available.

Pledge Statement Issues

The following issues with the **Pledge Statements** report are resolved in this release:

- **Fixed:** Statements in the **Pledge Statements** report are listed in random order

Previously in the **Pledge Statements** report, the statements were randomly ordered, which made it challenging for users to locate a pledge they were looking for. To help make statements easier to find, we made the following changes:

- ❖ If **Formal Mailing Name** is selected in the report setup, pledge statements now print in alphabetical order by the donor's last name as it appears in the **Formal Mailing Name** field in the family or member record.
 - ❖ If **Informal Mailing Name** is selected in the report setup, pledge statements now print in alphabetical order by the donor's last name as it appears in the **Informal Mailing Name** field in the family or member record.
 - **Fixed:** Donor addresses sometimes missing from statements in **Pledge Statements** report
- Previously if the **Address Line 2** field in the family record contained a value, the family's address was missing from their statement in **Pledge Statements** report. We fixed this issue.

Imports

Fixed: Online Giving Import Process Not Linking All Contributions to Associated Pledges

Previously, the Online Giving import process linked contributions only to pledges that had an external pledge ID. We fixed this issue. All imported contributions are now linked to their associated pledges.

Contributions

Fixed: Correction Batch Issues

The following issues with correction batches were resolved in this release:

- **Create Correction Batch** button is unresponsive when used to create a correction batch from a filtered list of contributions on the **Contribution List** page.
- Users sometimes receive an error message when creating a correction batch even though the batch identified as errored is successfully created.
- When users try using a correction batch to change a member contribution to a family contribution, the system does not change the donor to a family and continues posting the contribution to the original member.

Development Manager

Imports

Fixed: Contributions to Same Pledge Generate Data Validation Error in OLG Import File

Previously, if the Online Giving import file contained individual contributions posted to the same pledge, the system reported a data validation error. We fixed this issue. The system now permits contributions to be posted to the same pledge.

Fixed: Conflict Between Pledge Adjustment Process and Import Behavior Option

We fixed the issue that caused a conflict between the adjustment process for pledge imports and the **Update Existing Pledge to Match Import** option, an **Import Behavior** option that is set on the **Settings** page. This conflict generated an import error and caused adjustments to be applied at the wrong time to existing pledges.

Pledges

Fixed: Cursor Loses OBO Selection and Disappears

We fixed the issue in **Pledge Details** that caused the cursor to lose the selection in the **OBO** field and then disappear.

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)