# ParishSOFT by Ministry Brands®

# PARISHSOFT DEVELOPMENT MANAGER AND OFFERING v2.18 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.18 of ParishSOFT Development Manager and Offering.

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# Development Manager and Offering

## Reports

### Enhancements Made to Improve Report Performance

This release includes enhancements designed to speed up the time it takes to generate the following reports, especially when large volumes of data are processed:

- **Contribution Detail Statement**

- **Pledge Statement**

- **Non-Giver Letter**

- **Contribution History by Donor**

- **Contribution Summary by Donor**

Additionally when you run a report, the system now adds it to a report queue and displays a message to inform you that the report will be completed at a later time. While you wait, you can move on to tasks in other areas of the module.

### Contribution Statements Now Show Donor's Name and Church's Name on Each Page

For identification purposes should statement pages become separated, the **Contribution Detail Statement** report now includes the names of the donor and church at the top page of the giving statement.

# Resolved Issues

## Development Manager Only

### Fixed: Scanline Lockbox Number Does Not Accept Leading Zero (0) in Fund Details

In Fund Details, the **Scanline Lockbox Number** field did not accept a six-digit number with a leading zero (0). We fixed this issue. As needed, you can now enter a six-digit number that starts with zero (0).

### Fixed: Online Giving Import Allows Contributions with the Same External PledgeIDs

We fixed the issue that allowed files imported from Online Giving to contain pledges with the same **ExternalPledgeID** values.

## Offering Only

### Fixed: Offering Generic Import Issues

The following issues with the Offering generic import process are resolved in this release:

- Batches that contain contributions with a zero (**0**) value in the **PledgeID** field are successfully imported, but the user experiences an error when closing such batches.

- Contributions not linked to a pledge are allowed to post to funds that require pledges.

- Contributions with a **NULL** value in the **PledgeID** field are automatically linked to a pledge that has a zero (**0**) value in this field.

- Batches containing contributions with duplicate **ExternalContributionID** do not trigger a data validation error.

# Development Manager and Offering

## Reports

### Fixed: Non Giver Letter Report Generates Unexpected Results

Previously the **Non Giver Letter** report included only the names of families that did not give to all funds selected in the setup. The report should only have returned the names of families that did not give to any of the selected funds. We fixed this issue. The following example is provided to help clarify the behavior of this report:

- If you select Fund A to which a family did not contribute, the family's name is included in the generated report. The family is a non-giver to the selected fund, so their name appears in the report.

- If you select Fund B to which a family contributed, the family's name is not included in the generated report. The family is a giver to the selected fund, so their name does not appear in the report.

- If you select both Fund A and Fund B, the family's name is not included in the report. The family is a giver to at least one of the selected funds, so their name appears in the report.

### Fixed: Family Groups Filter for Contribution Detail Statements Gives Unexpected Results

In the setup for the **Contribution Detail Statement** report, we fixed the issue that caused the **Family Groups** filter to ignore families belonging to the selected family group.

### Fixed: Date Shown on Some Reports Is One Day Off

The date functions in the setup for the following reports include time in their formulas. Previously, the date shown on some of them was one day off from the date specified in the report setup. To address this issue, we modified their date functions to ignore time.

**Development Manager**

- Parish Reports
    - ❖ All Parishes Refund Shortfall
    - ❖ All Parishes Summary
    - ❖ Designations Details
    - ❖ Parish Date Over Goal
    - ❖ Donor List
    - ❖ Periodic Report
    - ❖ Pledges Past Due
    - ❖ Parish Master Report

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- ❖ Contribution Details
- ❖ Pledge Details (Between...and)
- ❖ All Parishes Summary (with Groups)
- ❖ All Parishes Summary: One-Time Gifts
- ❖ Parish Master Report: One-Time Gifts

- Donor Reports
  - ❖ Contribution Detail Statement Report
  - ❖ Pledge Statement (Statement Month, Statement Year, Statement Date, and Contribution Scheduled for)
  - ❖ Non-Giver Letter
  - ❖ Tax Receipt

- Diocese Reports
  - ❖ Appeal Progress Report (End point Date to Compare Progress)
  - ❖ Audit Reports
  - ❖ Contribution History by Donor
  - ❖ Contribution History by Fund
  - ❖ Dollar Range
  - ❖ Pledge Adjustment Report
  - ❖ Revenue Projection (Month)

**Offering**

- Donor Reports
  - ❖ Contribution Detail Statement
  - ❖ Pledge Statement (Statement Date, Contribution Scheduled for, Statement Month, and Statement Year)
  - ❖ Non Giver Letter
  - ❖ Tax Receipt

- Analysis Reports
  - ❖ Contribution Details
  - ❖ Contribution History by Donor
  - ❖ Contribution History by Fund
  - ❖ Contribution Summary by Donor (From…To)
  - ❖ Contribution Summary by Fund
  - ❖ Dollar Range (From…To)
  - ❖ Revenue Projection (Month)
- Pledge Reports
  - ❖ Donor List (Between…and)
  - ❖ Families without Pledges
  - ❖ Pledge Adjustments
  - ❖ Pledge Details
  - ❖ Pledges Past Due (Date)
- Audit Reports

### Fixed: 'Adjust Amount' Filter Incorrectly Calculates Pledge Statement Adjustments

We fixed the issue that caused the **Adjust Amount for Extra or Missed Payments** filter in the setup for the Pledge Statements report to incorrectly calculate installment amounts.

## Imports

### Fixed: Batch Deposit Date and Time Zone Synchronization Issue

We fixed a time zone synchronization issue that caused the deposit date on batches after being imported from Offering into ParishSOFT Accounting to be a day earlier than the deposit date on batches before being imported.

# Contacting ParishSOFT

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

| | |
|---|---|
| P | https://support.parishsoft.com |
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