



PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.21 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.21 of ParishSOFT Development Manager and Offering.

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Development Manager and Offering

Reports

Updates Made to the Canadian Tax Receipt Report

The **Canadian Tax Receipt** report was updated as follows:

- Previously, the giver's mailing address appeared at both the top and the bottom of each giver's statement. We removed the unnecessary duplicate address at the top of the statement. We also repositioned the address block at the bottom so that when a statement is folded, the giver's address shows through a #10 envelope window.
- The letter accompanying a giver's tax receipt opens with this salutation: **Dear <Name>.** Users can control the display of the recipient's name by selecting a **Mailing Name Type** option in the **Report Contents** configuration as shown below:

A screenshot of a web interface titled "Report Contents". Under the "Statements" section, there is a "Mailing Name Type" dropdown menu. The menu is open, showing four options: "Family Formal Mailing Name", "Family Informal Mailing Name", "Family Formal Salutation", and "Family Informal Salutation".

Funds

Filter and Sort Settings for the Funds List Retained After Logout

The system now automatically saves your filter and sort settings for the **Funds** list and retains them as your personal defaults. Even after you log out, the settings remain the same until you change them. Be aware that your settings are saved on your local device, so if you log in using a different device, you may see different settings.

Batches

Filter and Sort Settings for Batches List Retained After Logout

With the exception of the **Fund** filter setting, the system now automatically saves your selected filter and sort settings for the **Batches** list and retains them as your personal defaults. Even after you log out, the settings remain the same until you change them. Be aware that your settings are saved on your local device, so if you log in using a different device, you may see different settings.

Pledges

Filter and Sort Settings for Pledges List Retained After Logout

With the exception of the **Fund** and **OBO Organization** (Development Manager only) filter settings, the system now automatically saves your filter and sort settings for the **Pledges** list and retains them as your personal defaults. Even after you log out, the settings remain the same until you change them. Be aware that your settings are saved on your local device, so if you log in using a different device, you may see different settings.

Contributions

Filter and Sort Settings for Contributions List Retained After Logout

With the exception of the **Fund** and **Batch** filter settings, the system now automatically saves your filter and sort settings for the **Contributions** list and retains them as your personal defaults. Even after you log out, the settings remain the same until you change them. Be aware that your settings are saved on your local device, so if you log in using a different device, you may see different settings.

Offering Only

Pledge Details Report Now Sorts Individual Reports by Donor's Name

When printed for multiple donors, the **Pledge Details** report now sorts individual statements in alphabetic order by last name then first name.

Resolved Issues

Development Manager and Offering

Reports

Fixed: 'Include Non-Givers' Filter Produces Errors in Contribution Summary by Donor Report

Previously, when generating a **Contribution Summary by Donor** report with the **Include Non-Givers** checkbox filter selected, users experienced the following errors:

- Missing donors
- Multiple entries per donor
- Missing non-givers
- Incorrect total and average contribution amounts reported for each donor

These issues were resolved.

Fixed: Canadian Tax Receipts Show Wrong Date

We fixed the issue that caused the **Issued** date and the report date shown at the top of the **Preview** and **Official** versions of Canadian Tax receipts to be the same but incorrect.

Fixed: Unable to Include Generated Tax Receipts in Excel Export

Previously after the user generated **Official** versions of Canadian tax receipts, they experienced an error when trying to export receipt details to Excel. We fixed this issue. After the user generates an Official version of tax receipts, they can successfully export information for the receipts to an Excel spreadsheet.

Funds

Fixed: Start and End Date Filters Produce Wrong List of Funds

Users reported that when applied to the **Funds** page, the **Start Date** and **End Date** filters produced the wrong results. The filtered list included funds outside of the specified date range. We fixed this issue. The filters now work as expected.

Batches

Fixed: Number of Batches Previously Selected Not Cleared from Canceled Search

Previously after the user filtered the **Batches** list to create a list of batches to change to **Review Status** and then canceled the search, the system did not clear the number of batches retrieved by the search as expected, maintaining instead a reference to the number of filtered batches. We fixed this issue.

Fixed: Fund and Default Contribution Type Lists Lack Type-Ahead Search Functionality

Previously in **Batch Details**, type-ahead search functionality was not available for **Funds** and **Default Contribution Type** dropdown lists. We fixed this issue. Now, as the user starts typing text into either field, they are presented with list options matching the text they enter.

Fixed: Batch Created From/To Filters Produce Wrong List of Batches

Users reported that when applied to the **Batches** page, the **Batch Created From** and **Batch Created To** filters produced the wrong results. The filtered list included batches outside of the specified date range. We fixed this issue. The filters now work as expected.

Pledges

Fixed: Pledge Filters Lost After Clicking Browser Back Button or Pledge Breadcrumb Link

Previously, any filters applied to the **Pledges** list were lost after the user left the page either by clicking the browser's Back button or by clicking the **Pledges** breadcrumb link. We fixed this issue. When the user leaves the **Pledges** page, all previously selected filters are now retained upon their return.

Contributions

Fixed: Filters Inconsistently Ordered on the Contributions and Pledges Pages

Previously, the Family and Member filters in the Filters panel on the **Contributions** and Pledges were not listed in the same order. We fixed this issue. In the Filter panel on both pages, the Family filter option now precedes the Member filter option.

Fixed: Exporting Filtered List of Contributions to Excel Sometimes Generates an Error

Previously if the user filter contribution data using decimal values in the **Amount Min** and **Amount Max** filters, the system generated an error when exporting the data file to Excel. We fixed this issue. The export file now generates successfully.

Fixed: From/To Filters Produce Wrong List of Contributions

Users reported that when applied to the **Contributions** page, the **From** and **To** filters produced the wrong results. The filtered list included contributions outside of the specified date range. We fixed this issue. The filters now work as expected.

Development Manager Only

Reports

Fixed: Generated Contribution Detail Report Contains No Data for Some Users

We fixed the issue that caused the output of the **Contribution Detail Report** to contain no data (blank output) for some parish users.

Offering Only



Reports

Fixed: Contribution Detail Statements Missing Information for Some Donors

We fixed the issue that caused **Contribution Detail Statements** for some donors to be missing a column of information.

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)