



PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.22 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.22 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.22

Development Manager and Offering

Reports

Donor Report Configuration Settings Retained After Logout

The system now automatically saves the following configuration settings for the **Contribution Detail Statement** report and retains them as the user's personal defaults:

- **Start Date** and **End Date**
- **Minimum Amount/Maximum Amount**
- **Family Registration**
- **Family Workgroup**

Even after a user logs out, the settings remain the same until changed. Settings are saved on the user's local device, so if the user logs in using a different device, they may see different settings.

Report Notifications and Temporary Report Storage Added

Both Development Manager and Offering now issue notifications provide temporary storage for certain reports. Specifically:

- **Long-running reports:** if a report takes more than 3 ¼ minutes to generate, the system delivers the report to a queue to await processing and notifies the user that the report may take a while to generate. After the report generates successfully, the user is notified that it is available for download from the **My Reports** window.
- **Reports that fail to generate:** if a report does not generate correctly, the user is notified of the error and prompted to re-run the report.

Be aware of the following:

- If a report takes less than 3 ¼ minutes to generate, the system processes it immediately. Upon completion, the system displays the report in the **My Reports** window where it can be downloaded.
- After a report is generated, the system retains it for seven days in temporary storage or until the user downloads it. After a report is downloaded, the system immediately removes it from storage to minimize clutter.

Batches

Batch List Shows Actual Contribution and Pledge Amounts and Counts

Previously, the **Batch** list showed counts and amounts of contributions and pledges required to balance a batch. Per customer request, the list was updated to now show counts and amounts of contributions and pledges currently posted to a batch.

Development Manager Only

Import

File Import Process Updated to Accept FundID and Appeal Code

The File Import process now accepts the **FundID** value, which enables you to import pledges from external sources and link them to funds created in Development Manager. The import process no longer recognizes **FundID** values carried over from Diocesan Development Manager (DDM), so they must be changed in the external data source.

Resolved Issues

Development Manager and Offering

Application-Wide

Fixed: Family Searches Not Finding All Families

Previously, on application pages containing a family search function, the results of searches were missing some families. This issue was resolved.

Reports

Fixed: Contribution History by Fund Report Shows Wrong Total for Multiple Funds

Previously in the **Contribution History by Fund** report, when the user selected the **Multiple Funds per page** option, the report showed contribution totals for all funds when it should have shown contribution totals for selected funds only. We fixed this issue.

Fixed: Pledges with No Initial Contribution Missing from Pledge Statement Report

We fixed the issue that caused certain options (for example, **Fund** and **Include Remittance Slip**) selected in the report setup to cause pledges with no initial contribution to be missing from the **Pledge Statement** report. We fixed this issue.

Fixed: Contribution Detail Statement Has Salutation When Body of Statement Omitted

Previously when the user selected the **No Body of Statement** option in the configuration for the **Contribution Detail Statement** report, the statements included a salutation when they should not have. We fixed this issue. When the body of statement is omitted from the report, the salutation no longer appears.

Fixed: Contribution Detail Statements and Mailing Labels Ordered by FamilyID

Previously, PDFs of contribution detail statements and mailing labels were sorted and printed in numeric order by **FamilyID**. We fixed this issue. Statements and labels are now sorted and printed in alphabetic order by last name.

Fixed: Footer Not Showing on All Pages in Contribution Detail Statements

Previously, contribution detail statements consisting of three or more pages displayed a footer on the first and last pages only. We fixed this issue. All pages now display a footer.

Fixed: Fund Summary in Contribution Detail Statements Sometimes Oddly Formatted

We fixed the issue that caused the Fund Summary section at the bottom of contribution detail statements from being formatted correctly.

Fixed: Name of Organization Not Showing in Fund Details

Previously, the Organization field in Fund Details was missing name of the owning organization. We fixed this issue. The field now shows the name of the organization that owns the fund.

Batches

Fixed: Batch List Searches Cannot Find Batches with Numbers in the Name

Previously, if the user entered a number as part of a name search on the **Batches** page, any batches having the number in their name were missing from the results. We fixed this issue. Batch list searches can now find batches with a number in their names.

Fixed: System Not Accepting Contributions Posted After Pledge End Date

Previously after the end date of a pledge passed, the prevented the user from posting contributions to the pledge even though the contribution date the same as or prior to the pledge end date. We fixed this issue. To clarify the posting rule:

- If the date of the contribution is the same as or prior to the pledge end date, the system allows the contribution to be posted to the pledge.
- If the date of the contribution is after the pledge end date, the system displays a message informing the user that the contribution cannot be posted because the pledge end date has passed.

Fixed: Option in 'Batch Order By' Filter Dropdown Has Wrong Label

Previously, in the **Batch Order By** filter's dropdown list, the **Giving Source** option was incorrectly labeled "Online Giving." We fixed this issue. The option is now correctly labeled "Giving Source."

Fixed: Correction Batch Process Not Searching for Pledge to Link to Moved Contribution

Previously, when the user created a correction batch to move a contribution from a fund not requiring pledges to a fund that did, the system did not search for a pledge to link to the moved contribution even though the **Batch uses pledges by default** option was enabled in **Settings**. We fixed this issue. If the **Batch uses pledges by default** option is enabled, the correction batch process now searches for the pledge, moves the pledge to the new fund, and then links it to the contribution.

Pledges

Fixed: Pledge List Export Shows Same Fund for All Pledges

Previously, all pledges listed in the Pledge List export file displayed the fund with the lowest **FundID** value. We fixed this issue. Each listed pledge is now displays the correct **FundID**.

Fixed: Contributions Sometimes Missing from Family's Pledge Details

Some users reported that contributions posted to pledges that were included in the pledge's contribution history were sometimes missing from the family's pledge details. We fixed this issue.

Fixed: Can't Save Pledge with Zero Dollar (\$0) Designation and Pledge Amounts

We fixed the issue that prevented users from being able to save a pledge if both the designation amount and pledge amount equaled zero dollars (\$0).

Contributions

Fixed: Wrong Icon Displayed for Member Contributions

Previously in grid view, member contributions showed the family icon when they should have shown the member icon. We fixed this issue. The correct icon is now associated with the contribution type.

Development Manager Only

Reports

Fixed: Total Paid Column in Designation Details Shows Wrong Value

Previously, in the Designation Details report, the Paid column showed the total pledged instead of the total paid. This issue was resolved.

Fixed: Some Parish Users Cannot Generate Contribution Detail Report

We fixed the issue that prevented some parish users from being able to generate Excel and PDF versions of the **Contribution Detail** report.

Pledges

Fixed: Pledge Designation Details Not Updated Correctly

Previously after the user updated the designation details for a pledge, both the **Amounts** and **Percentages** fields displayed a zero (0) value. We fixed this issue. The fields now update with the user-specified values.

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)