PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.7 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.7 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.7

Development Manager

Batches

Added Ability to Delete the Contents of Non-Empty Open and Review Batches

There is now a way to delete Open and Review batches that contain contribution and pledge records. To delete a non-empty batch, simply open it and click the **Delete** button. The system prompts you to confirm the deletion. Be advised that after you delete a batch, you cannot recover the contents.

Offering

Batches

Added Ability to Delete the Contents of Non-Empty Open and Review Batches

There is now a way to delete Open and Review batches that contain contribution and pledge records. To delete a non-empty batch, simply open it and click the **Delete** button. The system prompts you to confirm the deletion. Be advised that after you delete a batch, you cannot recover the contents.

Settings

Options Added to Settings Page

We added the following parish-specific options to the **Settings** page:

- **Only Batch Owner Can Modify Pledges in Batch** checkbox

  The person who initially creates a batch is considered the rightful owner. This checkbox has two settings:

  - ❖ Selected: only the batch owner can change pledges in a batch.

  - ❖ Not selected (the default): users with the appropriate batch permissions, including users who do not own the batch, can make modifications to pledges in batches.

- **Display End Date for Pledge Entry** checkbox

  The end date is the last date that payments can be posted to a pledge. This checkbox has two settings:

  - ❖ Selected: the **End Date** field is displayed the pledge form for data entry.

  - ❖ Not Selected: the **End Date** field is not displayed in the pledge form for data entry.

- **Import Behavior** dropdown list

    The options in this list give you finer control over how the import process handles lockbox imports and contributions coming into the system from Online Giving. Select one of the following:

    ❖ **Add Imported Pledge**: the import process performs no validation checks for an additional active pledge. An active pledge is one with an end date that is either NULL or after today.

    ❖ **Reject Imported Pledge**: the import process checks for an additional active pledge associated with the same fund and family. If a pledge matching this criteria is found, the process returns an error informing the user that an active pledge exists for the donor. An active pledge is one with an end date that is either NULL or after today.

    ❖ **Update Existing Pledge to Match Import**: the import process checks for an additional active pledge. If one is found, it adjusts the existing pledge by the amount of the imported pledge. If a contribution is attached to the pledge, the contribution is posted to the existing pledge with the **Initial Contribution** box deselected.

Resolved Issues

Development Manager

Reports

Fixed: Amount Filters for Contribution Detail Statements Pull Wrong Data

Previously filters in the setup for the Contribution Detail Statements report, the **Minimum Amount** and **Maximum Amount** filters used the giver's contribution amounts when they should have used the giver's total giving as the data source. We fixed this issue.

Fixed: Funds Field in the Dollar Range Report Header Always Displays "All Funds"

The **Funds** field in the **Dollar Range** report header now displays the name of the fund selected in the report setup.

Fixed: Parish Master Report Displays a Date Range When None Specified

Previously when the user specified no date range for the Parish Master report, the report displayed a date range. We fixed this issue. If no date range is specified, the header reads as follows:

```
<Fund Name> Updated as of <today's date> (with 0 remaining periods)
```

Fixed: Contribution Amounts Sometimes Misaligned in Contribution Detail Statements

We resolved an issue that caused the contribution amounts in the Contribution Detail Statement report to be misaligned with the column header whenever the user selected not to show the **Check Number** column.

Fixed: Contribution Detail Statement Report Displays Contributions in Wrong Order

Previously, contributions listed in a giver's Contribution Detail Statement report were displayed in order by Contribution ID instead of by posting date. We fixed this issue. Contributions are now correctly ordered by posting date.

Fixed: Header in All Parishes Refund Shortfall Report Displays the Wrong Date

Previously, the header in the **All Parishes Refund Shortfall** report displayed the current date when it should have displayed the user-specified end date. We fixed this issue.

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Fixed: Donor List Report Shows Wrong Date Range, Pledge Count, and Family Count

Users reported experiencing the following issues with the **Donor List** report:

- Excluded pledges having the same start date as the selected fund.

- Showed few families on the Summary page than on the donor list.

- On the last page, showed the number of families with paid pledges when it should have shown the number of families with pledges.

These issues were resolved.

Fixed: Date Range Picker Not Filtering Entries Correctly in Audit Report

We resolved an issue that caused the date range picker in the **Audit** report to include entries having a date one day later than the user-specified end date in the report setup.

Offering

Reports

Fixed: Amount Filters for Contribution Detail Statements Use Wrong Data Source

Previously filters in the setup for the Contribution Detail Statements report, the **Minimum Amount** and **Maximum Amount** filters used the giver's contribution amounts as the data source when they should have used total giving as the data source. We fixed this issue.

Fixed: Column Headers in Pledge Detail Report Misaligned with Data Rows

We fixed the issue that caused the column headers in the **Pledge Detail** report to be misaligned with the data rows.

Fixed: Funds Field in the Dollar Range Report Header Always Displays "All Funds"

The **Funds** field in the **Dollar Range** report header now displays the name of the fund selected in the report setup.

Fixed: Cannot Generate Contribution Detail Statement Report for a Single Day

Some users reported that they could not select the same start and end date in the setup for the **Contribution Details** report. As a result, they could not generate statements for a single day. We resolved this issue.

Fixed: Contribution Detail Statement Report Displays Contributions in Wrong Order

Previously, contributions listed in a giver's **Contribution Detail Statement** report were displayed in order by Contribution ID instead of by posting date. We fixed this issue. Contributions are now correctly ordered by posting date.

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These issues were resolved.

Fixed: Date Range Picker Not Filtering Pledges Correctly in Pledge Detail Report

We resolved an issue that caused the date range picker in the **Pledge Detail** report to exclude pledges with a pledge date matching the user-specified start date in the report setup.

Fixed: Date Range Picker Not Filtering Entries Correctly in Audit Report

We resolved an issue that caused the date range picker in the **Audit** report to include entries having a date one day later than the user-specified end date in the report setup.

Fixed: Error Experienced When Running Dollar Range Report

Some users reported experiencing a `Status Code: 400` error when attempting to run a **Dollar Range** report. We fixed this issue.

Fixed: Email Addresses Missing from Contribution Summary by Donor Report

Previously, the **Email Address** column in the **Contribution Summary by Donor** report contained no email address data. We fixed this issue.

Fixed: Last Name Sort Not Working in Contribution Summary by Donor Report

The sort by Last Name option in the **Contribution Summary by Donor** report now works correctly.

Fixed: Contribution Summary by Fund Report Missing Contributions

We resolved the issue that prevented the **Contribution Summary by Fund** report from displaying all contributions matching the user's filter criteria.

Fixed: Amount Filters in Contribution Summary by Donor Report Pull Wrong Data

We resolved the issue that caused the **Minimum Amount** and **Maximum Amount** filters for the **Contribution Summary by Donor** report to filter individual contributions within the user-specified date range instead of the family's total giving.

Fixed: Start Date for Contribution History by Donor Report Missed by Date Picker

We resolved the issue that prevented **Contribution History by Donor** report from displaying contributions with a posting date the same as the user-specified start date in the report setup. The date range picker now works as expected and includes all contributions within the specified date range.

Contacting ParishSOFT

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

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