



# PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.8 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.8 of ParishSOFT Development Manager and Offering.

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## What's New in Version 2.8

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### Development Manager and Offering

#### Family and Member Searches

##### Search Results List Updated

The search results list for families and members was updated as follows:

- Values in the **ID** column are no longer hyperlinked.
- Pressing the **Tab** key moves the cursor from one link to the next.

#### Batches

##### Changes Made to Improve Efficiency of Batch Posting Process

We modified the following elements of the posting process for contributions to make data entry faster and more efficient:

- Batch entry form can be configured to contain separate fields for ID and name data  
On the **Settings** page, two ID + Name options were added to the **Batch Posting – Default Contributions Default Family** lookup dropdown list. The new options let the user configure a batch entry form that contains separate fields for the ID and name.
  - ❖ For changes to Development Manager, see "[Batch Posting - Default Contributions Default Family Lookup Dropdown List Updated](#)" on page 5.
  - ❖ For changes to Offering, see "[Batch Posting - Default Contributions Default Family Lookup Dropdown List Updated](#)" on page 6.
- **Enter** key behaves like the **Tab** key  
When posting contributions, users can now use **Enter** or **Tab** key to move the cursor to the next field in the batch entry form.
- **Amount** field is pre-filled  
The system now carries forward the value in the **Amount** field from the previous contribution record into the **Amount** field of the next contribution record. If you need to change the pre-filled value, simply select it and enter a new one.

- Checkbox option added to the batch entry form to give users control over pledge searches

As shown below, a new checkbox option, labeled **Batch use pledges**, was added to the data entry form for new batches:

The screenshot shows a data entry form for a new batch. The form includes the following fields and options:

- Organization:
- Fund\*:
- Created:
- Description\*:
- Status:
- Default Contribution Date\*:
- Closed Date:
- Giving Source:
- Display Check Number in Posting
- Display Memo in Posting
- Batch uses pledges** ⓘ

Previously during the contribution posting process, the system always searched the database to locate a pledge to associate a posted contribution to. If a database contained a lot of pledges, it sometimes took a while for a search to be completed, which slowed down the data entry process.

To help speed data entry, we added the **Batch uses pledges** checkbox (shown above) to the data entry form for new batches. The checkbox allows users to control whether the system conducts a pledge search. The checkbox has two settings, which are described below:

- ❖ Selected: before adding a contribution to a batch, the system conducts a pledge search to locate a pledge to match the contribution to. If a matching pledge is found, the system links it to the contribution.
- ❖ Not selected: before adding a contribution to a batch, the system does not conduct a pledge search to locate a matching pledge. Therefore, contributions posted to the batch are not linked to pledges, and no pledge icon is displayed next to the contribution in the batch record.

The default setting for the **Batch uses pledges** checkbox is globally configured on the application's **Settings** page by a user with the appropriate permissions. For details, see "[Option Added to Control Pledge the Search and Validation Process in New Batches](#)" on page 4. After the global default setting is set, it applies to all new batches. In certain instances, a user may need to override the global setting. This is easily accomplished by changing the **Batch uses pledges** checkbox setting locally within the newly created batch. Be aware that a locally changed setting applies to the specific batch only.



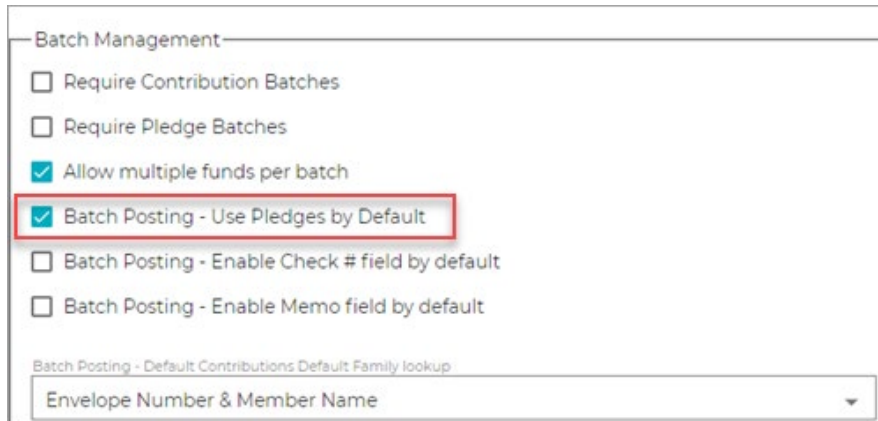
#### **IMPORTANT**

**If you change the Batch uses pledges checkbox setting in a specific batch, you must make the change before saving the batch. After you save the batch, the system does not allow you to make the change.**

## Settings

### Option Added to Control the Pledge Search and Validation Process in New Batches

As shown in the following illustration, the **Batch Management** group features a new option, labeled **Batch Posting - Use Pledges by Default**. This option globally controls whether the system conducts a pledge search before posting contributions to newly created batches.



Batch Management

- Require Contribution Batches
- Require Pledge Batches
- Allow multiple funds per batch
- Batch Posting - Use Pledges by Default
- Batch Posting - Enable Check # field by default
- Batch Posting - Enable Memo field by default

Batch Posting - Default Contributions Default Family lookup

Envelope Number & Member Name

The option has two settings:

- Selected: by default, the **Batch uses pledges** checkbox is selected in the data entry form for all new batches. Before the system adds a contribution to a batch, it conducts a search of the database to locate a pledge to match the contribution to.
- Not selected: by default, the **Batch uses pledges** checkbox is not selected in the data entry form for all new batches. Before the system adds a contribution to a batch, it does not search for a pledge to match the contribution to.

The global default setting applies to all newly created batches. If desired, the user can override the global default setting for a specific batch. For details, see "[Option added to batch entry form to force system to bypass a pledge search.](#)"

# Development Manager Only

## Family and Member Searches

### Search Results List Updated

The search results list for families and members now includes the donor's ID.

## Settings

### Batch Posting - Default Contributions Default Family Lookup Dropdown List Updated

In the **Batch Management** group, the following options were added to the **Batch Posting - Default Contributions Default Family lookup** dropdown list:

- **Family ID** and **Family Name**: sets the **Family ID** and **Family Name** as the default lookup fields in the data entry form for batches. As shown below, the ID and name data are split into two fields:

Contributions	Count	1/0	Pledges	Count	0/0
	Amount	\$100.00 / \$1.00		Amount	\$0.00 / \$1.00

Family ID*	Family Name	Amount*	Ck #
<input type="text"/>	<input type="text"/>	120	<input type="text"/>

Donor Info:  Aaron Seagle (555-2222)  
4340 Eagleville Rd  
Marquette, 49855

Fund: A  
Tax Ded  
Contrib  
Date: 05

- **Member ID** and **Member Name**: sets the **Member ID** and **Member Name** as the default lookup fields in the data entry form for batches. The ID and name data are split into two fields.

## Offering Only

### Family and Member Searches

#### Search Results List Updated

The search results list for families and members now show the donor's envelope number instead of the donor ID.

## Settings

### Batch Posting - Default Contributions Default Family Lookup Dropdown List Updated

In the **Batch Management** group, the **Family ID**, **Member ID**, and **Pledge ID** options were removed from the **Batch Posting - Default Contributions Default Family lookup** dropdown list. The following options were added:

- **Envelope Number** and **Family Name**: sets the **Envelope Number** and **Family Name** as the default lookup fields in the data entry form for batches. As illustrated below, the envelope number and name data are split into two fields:

Contributions	Count	0 / 0	Pledges	Count	0 / 0
	Amount	\$0.00 / \$1,000.00		Amount	\$0.00 / \$1.00

Contributions	Pledges
Env #*	Family Name
Amount*	Pledge

Donor Info:

Fund: 2 All Saints Day  
Tax Deductible?:   
Contribution Type: Cash (unspecified)  
Date: 05/10/2021

- **Envelope Number** and **Member Name**: sets the **Envelope Number** and **Member Name** as the default lookup fields in the data entry form for batches. The envelope number and name data are split into two fields.

# Resolved Issues

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## Development Manager and Offering

### Reports

#### Fixed: Delete Button Incorrectly Disabled for Letterhead and Signature Graphics

Previously, the **Delete** button was grayed out, so the user could not use it to remove a letterhead or signature graphic from the letter accompanying contribution detail statements. We resolved this issue. The **Delete** button is now active and available.

#### Fixed: Pledge Statements Report Missing Some Pledges

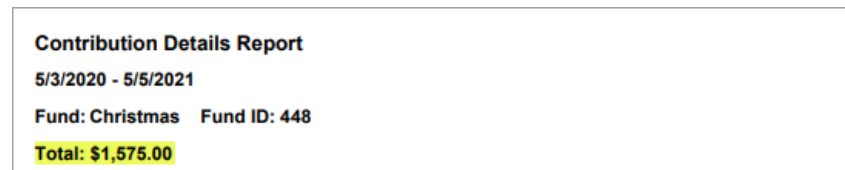
We fixed the issue that prevented pledges with deselected months in their frequency from appearing in the **Pledge Statements** report.

#### Fixed: Batch Details Shows Wrong Pledge Amount for Adjusted Pledges

We resolved the issue that caused Batch Details to show the adjusted amount for changed pledges instead of the original pledge amount.

#### Fixed: Contribution Details Report Missing Grand Totals

As illustrated below, the **Total** field was inserted into the header of the **Contribution Details** report. This field shows the grand total of contributions made during the specified date range to the fund shown in the **Fund** field.



<b>Contribution Details Report</b>
5/3/2020 - 5/5/2021
Fund: Christmas Fund ID: 448
<b>Total: \$1,575.00</b>

## Contributions

#### Fixed: Donor Information Missing from Results When Search Filter Set to Member ID

Users reported that when adding a new contribution record, donor information was missing from the search results when the **Lookup Type** was set to search by member ID. We fixed this issue.

## Offering Only

### Reports

#### Fixed: Detail Contribution Statement Missing a Specific Family's Member Contributions

Previously, when the user generated a detailed version of the **Contribution Detail Statement** report for a specific family, the report contained no family member's contributions. We resolved this issue.

### Imports

#### Fixed: ParishSOFT Giving Integration Errors Experienced

Some parishes reported experiencing transaction errors when using the ParishSOFT Giving Integration. We found and fixed the issue causing these errors.

### Batches

#### Fixed: View Permissions Not Working As Expected After Bulk Change Status Operation

We fixed the issue that allowed some users without the appropriate permissions to view batches whose status was changed using the **Batch Bulk Change Status** operation.

### Contributions

#### Fixed: Family and Member Search Results Sorted Incorrectly

Previously, family and member search results were sorted by last name and then incorrectly by ID. We fixed this issue. Search results are now sorted by last name with a secondary sort by first name.

### Settings




#### Fixed: 'Allow Multiple Funds per Batch' Option Ignores Parish's Selected Setting

Previously, the correction batch process ignored the parish's selection of the **Allow Multiple Funds in Batches** setting and used the diocese's setting instead. As a result, parish users sometimes experienced an error informing them that a correction batch could not be created because the batch contained contributions from multiple funds. We resolved this issue.



## Contacting ParishSOFT

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

	<a href="https://support.parishsoft.com">https://support.parishsoft.com</a>
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)