ParishSOFT by Ministry Brands®

PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.9 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.9 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.9

Development Manager and Offering

Reports

Salutation Changed in Non-Giver and Contribution Detail Statement Letters

The non-giver letter and the letter accompanying contribution detail statements now open with "Dear" followed by the recipient's name and a comma, as in the following:

Dear Mr. and Mrs. Patrick King,

Donor Information Added to Footer of Contribution Detail Statements

Individual pages in the **Contribution Detail Statement** report now display the following information in the footer:

- Development Manager: donor's first and last name, family ID, page number.

- Offering: donor's first and last name, envelope number, page number.

Salutation Style and Mailing Name in Address Block Use Same Level of Formality

Previously, the mailing name on the letter accompanying contribution statements matched the salutation. With this update, the mailing name and salutation use the same level of formality, specifically:

- When the selected mailing name option is **Family Formal Mailing Name** or **Family Formal Salutation**, the address block uses the formal mailing name.

- When the selected mailing name option is **Family Informal Mailing Name** or **Family Informal Salutation**, the address block uses the informal mailing name.

Development Manager Only

Reports

Overpayment and Unpaid Pledge Columns Added to All Parish Summary Report

The **All Parish Summary** report now includes these columns of information:

- **Overpayment**: shows the total dollar amount of overpaid pledges for each listed parish.

- **Unpaid Pledge**: shows the total dollar amount of unpaid pledges for each listed parish.

Offering Only

Reports

Envelope Number Replaces Donor ID in Contribution Detail Statements

Previously, the address block in the letter accompanying a giver's contribution detail statement showed the family or member ID of the donor. Per customer request, we replaced the ID with the donor's envelope number.

Resolved Issues

Development Manager and Offering

User Interface Elements Updated

Fixed: Labels and Tooltips Changed for Clarity

For clarity and conciseness, we made the following changes to elements in the application's user interface:

- In the wording of the tooltip for the pledge search icon, "Family Name" was changed to "Family Last Name."

- In **Pledge Details**, the label for the **Adjustment Date** option was changed to **Pledge Date**.

- In the filters panel on the **Donor Reports** page, the label on the **Include Payment Types** tab was changed to **Include Contribution Types**.

Reports

Fixed: Numeric Fields Formatted As Text in Excel Export

Previously, data in some of the numeric columns in the Excel export were incorrectly formatted as text. We fixed this issue. The values in all numeric columns are now correctly formatted as numbers and, where applicable, as dates.

Fixed: Statements in Pledge Statements Report Not Sorted Alphabetically

Statements in the Pledge Statements report are now sorted in alphabetic order by the donor's last name followed by the first name.

Batches

Fixed: Clear Search Button Does Not Clear 'Created Date' Filter Settings

We fixed the issue on the **Batches** page that prevented the Clear Search filter button ↺ in the filters panel from clearing the dates from the **Created Date** filter. The button works as expected to clear all filter settings.

Fixed: Posting Date Missing for Contributions in Closed Batches

Per customer request, we updated the closed batch record to include the posting date for contributions. As illustrated below, the **Contribution Date** column shows the date each contribution was posted:

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Reports

Fixed: Dropdown Lists in Parish Reports Accept Free Text Input

Previously, the dropdown lists in the **Parish Reports** group incorrectly allowed free text entry. We fixed this issue. Outside values can no longer be entered into the dropdown list field. Users must choose a single option from a list of options.

Fixed: Parish Master Report's Header Displays Address of First Organization Only

Previously, when the user set up **a Parish Master** report that included multiple organizations, the header on each organization's page pulled the address from the first selected organization. We fixed this issue. The correct address is now displayed on each organization's page in the report.

Imports

Fixed: Lockbox Process Ignores Fund's Default Tax Deductible Setting

Previously, the lockbox import process did not read the value of a fund's default tax deductible setting and apply the value to imported contributions. As a result, the **Tax Deductible?** checkbox in the records of imported contributions was not selected when it should have been. We fixed this issue. The import process now reads the default tax-deductible value of the fund receiving the contributions and applies that value to all imported contributions.

Offering Only

Batches

Fixed: Contribution Record Always Shows Family's Parish of Registration Env#

Previously when a contribution for a family associated with multiple organizations was posted to a batch, the batch record always showed the envelope number assigned by the parish of registration instead of the envelope number of the active parish. We fixed this issue. The batch record now shows the envelope number of the active organization.

Settings

Fixed: Envelope Number Not Recognized as Default Lookup Type for Searches

Previously, when the default lookup type was set to **Envelope Number** and the user tried to post a contribution using a valid envelope number, the system incorrectly searched for a matching donor using the Family ID. We fixed this issue. The system now recognizes the **Envelope Number** setting.

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
✉	support@parishsoft.com
☎	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)