

PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.23 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.23 of ParishSOFT Development Manager and Offering.

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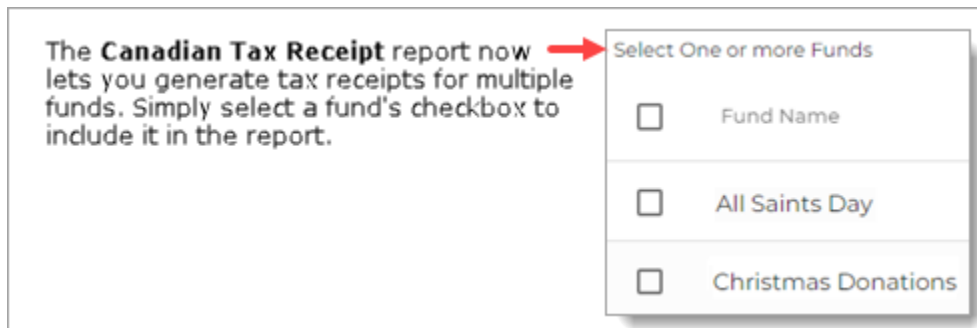
What's New in Version 2.23

New! Development Manager and Offering

Reports

Multi-Fund Selection Feature Added to Setup for Canadian Tax Receipt Report

As shown in the following illustration, we added a multi-fund selector to the setup for the **Canadian Tax Receipt** report. Use the selector to generate tax receipts for a single fund, multiple funds, or all funds.



Batches

Unique Batch Names Now Required

Multiple batches can no longer have the same name. If you give a batch a name that is already in use, the system displays this message prompting you to specify a unique name:

This batch name is already in use. Enter a unique batch name.

Pledges

Merged Cells Eliminated from Exported Pledge List Report

The exported Excel version of the **Pledge List** report no longer merges cells.

New! Development Manager Only

Imports

Clarified Error Messages for Lockbox Imports

We updated the text of error messages you might encounter when processing contributions through a lockbox import. The updated messages provide clearer and more specific information to help you understand and resolve issues faster.

New! Offering Only

Reports

Pledge Details Report Now Organizes Content in a Two-Column Format

The **Pledge Details** report now uses a two-column format to display contribution details. Within a column, contributions are listed in date order (from most to least recent). The new layout saves space and reduces paper waste when the report is printed.

Date Range Filter Added to Contribution Summary by Fund Report

The **Contribution Summary by Fund** report now features a date range filter. This filter lets you create custom date ranges so you can view fund totals for any time period that is meaningful to you.

Resolved Issues

Fixed! Development Manager and Offering

Reports

Fixed: Canadian Tax Receipts Sometimes Shows Wrong Year for Received Donations


Previously, Canadian tax receipts sometimes showed the current year in the **For Donations Received in** field instead of the year defined by the **End Date** specified in the report setup. We fixed this issue. Tax receipts now show the correct year for received donations.

Batches

Fixed: No Error Message Displayed for Delete Contribution Error

Previously if a validation error occurred when the user tried to delete a contribution from a batch, the system displayed no message to notify the user. We fixed this issue. If an error is experienced, the system now displays an error message.


Fixed: Pledge Pop-Up Window for Members Displays But Shows No Pledges

Previously on the **Batches > Postings** page, clicking the handshake icon  opened the member's pledge window, but member pledges were missing. This issue was resolved.

Fixed: Multi-Edit Changes Made to Contributions Not Showing After a Save

Previously, after the user successfully saved multi-edit changes to contributions in a batch, the records in the batch contribution list did not display the changes. We fixed this issue.

Fixed: Cannot Delete Batches Whose Status Was Changed to Review

Previously, the user experienced an error when trying to delete a batch whose status had been changed using the **Batch Bulk Change Status** tool (accessed by clicking this toolbar button on the **Batches** page: ). We fixed this issue.


Pledges

Fixed: Edit Contributions Window Shows Both Family and Member Contributions

Previously in **Pledge Details**, the **Edit Contributions** window showed contribution details for both family and member pledges when it should have shown details only for the type of pledge (family or member) the user selected to edit. We fixed this issue. The window now shows only the contributions associated with the type of pledge the user selected to edit.

Contributions

Fixed: Pledge Pop-Up Window for Add Contributions Missing Member Pledges

Previously during the add contribution process, clicking the handshake icon  opened a pop-up window that listed pledges posted to the family only. We fixed this issue. The pop-up window now includes both family and member pledges.

Fixed! Development Manager Only

Reports

Fixed: Appeal Progress Report Shows Incorrect Goal, Pledge, and Contribution Amounts

Previously in the **Appeals Progress** report, goal, pledge, and contribution counts were incorrect. We fixed this issue.

Imports

Fixed: System Allows Contribution Imports to Pledges Owned by Other Organizations

Previously, the system allowed the user to import contributions linked to pledges belonging to other organizations. We fixed this issue. The import process now checks the **PledgeID** on each contribution in the lockbox file. If a different organization owns the pledge, the import is blocked with this message:

```
Pledge belongs to a different organization
```

Batches

79997 Fixed: OBO Dropdown List Includes Parishes with No Goals

In batch posting for pledges, we fixed the issue that caused the OBO dropdown list to incorrectly include organizations with no goals when the **Only organizations with goals** option enabled.

When the **Only include organizations with goals** is enabled, the system uses the following criteria to select the default OBO organization:

- If the organization of registration has a goal, it is the default selection.
- If the organization or registration does not have a goal, the default selection is the diocese.
- If the pledging family is not registered to any organization, the default selection is the diocese.

Pledges

Fixed: User's Selection in OBO Dropdown for Sustaining Gifts Sometimes Loses Focus

Users reported that when selecting an organization from the OBO dropdown list in a sustaining gift record, the selection sometimes lost focus and was no longer visible. We fixed this issue.

Fixed! Offering Only

Reports

Fixed: Sort Direction Selector in the Contribution Details Report Not Working

We fixed the issue that caused the **Sort Direction** selector in the setup for the **Contribution Details** report from working as expected, which prevented users from being able to change the order in which contributions were displayed.

Pledges

Fixed: Member Pledge Payments Sometimes Posted to Family Pledge

Previously if a family and one of its members had a pledge to the same fund, the system incorrectly posted payments entered for the member's pledge to the family's pledge. We fixed this issue. The system now posts a member's payment to their pledge.

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)