

# PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.24 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.24 of ParishSOFT Development Manager and Offering.

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## What's New in Version 2.24

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### *New!* Development Manager and Offering

#### Imports

##### Generic Import Process No Longer Appends the Fund Name to the Batch Name

In a previous release, to ensure that imported batches were uniquely named, the generic import process appended the fund name to the name of each incoming batch. We determined that this naming convention is no longer required. Therefore, after an import a batch retains its original, user-specified name.

#### Funds

##### User Confirmation Required When Transfer Date for Sustaining Gifts Is Before End Date

When using the **Transfer Recurring Gifts** feature, users must now confirm a request to move a gift to a new fund on a date that occurs before the end date of the fund from which they are moving the gift.

## Resolved Issues

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### *Fixed!* Development Manager and Offering

#### Reports

##### *Fixed:* Address Blocks Misaligned on Canadian Tax Receipts

Previously, the donor address block and the parish address block did not line up correctly inside the window of a standard window envelope. We fixed this issue so that the address blocks are now visible when the tax receipt statement is folded along the dotted line as indicated in the report.

### *Fixed!* Development Manager Only

#### Reports

##### *Fixed:* Formatting Issues in Parish Summary Report

We adjusted the pagination in the **Parish Summary** report to prevent column headings from being pushed to the bottom of the first page and their details from being forced to the top of the next page under no headings.

## Imports

### Fixed: Contribution Fields Empty in Batch Details After Online Giving Pledge Import

Previously batch details for a pledge file imported from Online Giving showed no values in the **Contribution Count** and **Contribution Amount** fields. We fixed this issue.

## Funds

### Fixed: Bulk Updates Made to Fund Permissions Not Working for All Organizations

Previously customers using an organization other than the diocese as the Development organization could not bulk update fund permissions for staff with active assignments in the organization selected in **Settings > Administration**. We fixed this issue.

## Pledges

### Fixed: Cannot Specify an End Date for Sustaining Gifts

We fixed the issue that prevented users from being able to specify an end date for sustaining gifts. The system now allows users to set an end date with the following restriction: an end date must be the same as or after the start date specified in the sustaining gift record.

## *Fixed!* Offering Only

## Reports

### Fixed: DDM Permissions Not Restricting Access to Organizations in Parish Reports Setup

Previously when setting up the Parish reports listed below, users with ParishSOFT DDM permissions were allowed to see and select organizations for which they should have been denied access. We fixed this issue. If the user has ParishSOFT DDM permissions enabled, they can only select organizations for which they are granted access.

- Donor List
- Designation Details
- Parish Date Over Goal
- Parish Master
- Parish Roster
- Contribution Details
- Pledge Details
- Parish Master One Time Gifts

## Funds

### Fixed: Can't Save Fund Record After Deleting a Fund a Project

Previously in organizations for which the ParishSOFT Accounting integration was enabled, users could not save a fund record after deleting a project from the **Fund Project** dropdown list. We fixed this issue.

## Batches

### Fixed: Bank Account Field in New Batch Form Missing Red Asterisk (\*)

Previously the **Bank Account** field in the new batch creation form was missing a red asterisk (\*), the designation for a required field. The field is now appropriately marked (\*) to let users know that they must select a bank account to save a new batch.

### Fixed: Wrong Envelope Numbers Sometimes Shown in Batch Posting List Report

Previously, the **Batch Posting List** report sometimes showed the wrong envelope number for a family if the family was assigned an envelope number at more than one parish. We fixed this issue. The report now shows the envelope number assigned to the family by the organization running the report.

## Contributions

### Fixed: Time Zone Issue Experienced in Lifetime Giving

We fixed the issue that caused the date shown in the contribution summary for Lifetime Giving to be one day earlier than the date in the contribution record.

# 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)