

# PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.26 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.26 of ParishSOFT Development Manager and Offering.

## **Table of Contents**

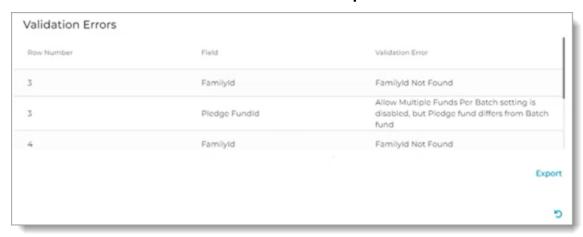
What's New in Version 2.26	2
New! Development Manager and Offering	2
Imports	2
New! Offering	
Imports	
Batches	
Contributions	
Resolved Issues	4
Fixed! Development Manager Only	4
Imports	4
Fixed! Offering Only	
Contacting ParishSOFT	

## **New!** Development Manager and Offering

## **Imports**

#### Added the Ability to Download Import Error Messages to an Excel File

To help you address problems with file imports, we added a feature that enables you to download error messages to an Excel file that you can refer to when diagnosing errors caused by issues in ParishSOFT Family Suite or a Giving program. As illustrated below, after an import the system displays a summary of errors encountered in the **Validation Errors** window on the **Import** tab:



To download the messages to an Excel file, click this button in the lower-right corner of the window: Export. Then, follow your browser's process for opening a downloaded file.

## **New!** Offering

#### **Imports**

#### Message Added to Alert Users When New Batches Are Created by the Giving Integration

Users in organizations that have enabled the giving integration between ParishSOFT Giving and Offering and the deposit integration between Offering and ParishSOFT Accounting will now be notified when new batches created by the integrations are available. The notification also provides instructions users must follow to finalize the integration and ensure that the batches are correctly deposited into ParishSOFT Accounting.

#### **Batches**

#### 'Deposited' Checkbox Control Added to Batch Details

We added a **Deposited** checkbox control to the batch record. This checkbox provides an easy way for you to manually mark a batch to indicate that it was transmitted to ParishSOFT Accounting. After you save a batch with the **Deposited** checkbox selected, the system will not create a deposit for the batch in your ParishSOFT Accounting system.



# After you save a batch with the Deposited checkbox selected, you cannot undo the selection.

To complement the **Deposited** checkbox control, the **Batches** page now features a filter that enables you to create a list of batches deposited into ParishSOFT Accounting. For details, see the next note in this document.

#### 'Deposited' Filter Added to the Filters Panel on the Batches Page

We added a **Deposited** filter to the Filters panel on the **Batches** page. Use this filter to create a list of batches that were transmitted to ParishSOFT Accounting. These are batches that have the **Deposited** checkbox selected in their records. For related information, see the previous note in this document.

#### Added Ability to Edit Certain Fields in Batches Originating from the Giving Integration

Users of the ParishSOFT Accounting to Offering integration can now edit the following fields in batches that originate from the giving integration:

- Bank Account
- Deposit Date
- **Deposited** checkbox: this checkbox should be selected only if deposit entries in the batch were manually created in ParishSOFT Accounting. After selecting the checkbox and saving the batch, you cannot change the checkbox value.

#### Deposit Button Added to Enable Deposit Transfers to ParishSOFT Accounting

In this release, we added a **Deposit** button to **Batch Details** to enable users of the ParishSOFT Accounting and Giving integration to easily transfer deposits to ParishSOFT Accounting. The button is visible only to staff users who have an active assignment to the current organization and have the **Accounting Integration Offering** access right enabled in their records.

#### Env # Field Replaces Family/Member ID in Batch Posting of Contributions

When posting contributions in a batch, you will now see the donor's envelope number as the identifier instead of the Family ID or Member ID.

#### Contributions

#### Env # Field Replaces ID Field in 'Contribution Add' Form

When posting contributions outside of a batch, you will now see the donor's envelope number in the first column in the **Contribution Add** form. After you save the contribution, the system shows the donor's envelope number in the **Contributions** list.

## **Resolved Issues**

## *Fixed!* Development Manager Only

## **Imports**

#### Fixed: Import Process for Online Giving Not Checking Import File for Existing Pledge Data

Previously when the **Update Existing Pledge to Match Import** setting was selected (on the **Settings** page in the **Import Behavior** dropdown list), the file import process did not search for existing pledges when it should have. As a result, the system sometimes created new pledge records instead of updating existing ones. We corrected this issue so that the process now searches for an existing pledge. Finding one, it updates the record accordingly; otherwise, it creates a new pledge record.

## Fixed! Offering Only

#### Fixed: Open, Closed, and All Status Links on the Batches Card Not Working As Expected

Previously, the **All** and **Open** filters on the Batches card correctly filtered for the selected status but the **Status** filter dropdown list did not show the selected filter value. We fixed this issue.

# **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
<b>5</b>	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)