

## PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.28 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.28 of ParishSOFT Development Manager and Offering.

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## What's New in Version 2.28

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### *New!* Development Manager and Offering

#### Funds

##### Explanatory Text Added to Help Clarify 'Add Pledge End Date' Process

To eliminate user confusion about the Add Pledge End Date process, we added the following explanation under the date search field in the **Add End Date Pledges** window:

Only pledges that do not already have an end date will be updated.

To clarify, the **Add Pledge End Date** process adds an end date only to selected pledges that have no end date. If a pledge already has an end date, the process does not change its end date.

#### Batches

##### AutoComplete Functionality Added to the Fund Filter in Batch Details

In Batch Details, we added AutoComplete search functionality to the **Fund** filter. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the fund's name into the text input field. When the desired fund is displayed, you can select it. Additionally, after you select a fund, the system now sets it as the filter's default value.

##### AutoComplete Search Functionality Added to Fund Filter on the Batches Page

On the **Batches** page, we added AutoComplete search functionality to the **Fund** dropdown filter. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the fund's name into the filter's text input field. When the desired fund is displayed, you can select it. Additionally, after you select a fund, the system now sets it as the filter's default value.

## Pledges

### [Adding Sustaining Gifts Now Permitted When Require Pledge Batches Option Enabled](#)

Previously when the **Require Pledge Batches** option (in the **Batch Management** section on the **Settings** page) was enabled, the **+** Add button on the **Pledges** page was hidden, which prevented users from being able to add a sustaining gift. We modified the option's behavior. Now, when the **Require Pledge Batches** option is enabled, the Add button is visible, so users add a sustaining gift. Note that the **Require Pledge Batches** option still works as expected. If enabled, batch-based entry is still required for pledges.

### [AutoComplete Functionality Added to Fund Search Filter](#)

On the **Pledges** page, we added AutoComplete search functionality to the **Fund** filter. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the fund's name into the filter's text input field. Additionally, after you select a fund, the system now sets it as the filter's default value.

## Contributions

### [AutoComplete Functionality Added to Fund and Batch Filters](#)

On the **Contributions** page, we added AutoComplete search functionality to the **Fund** and **Batch** filters. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the filter's text input field. When the desired option is displayed, you can select it. Additionally, after you select an option, the system now sets it as the filter's default value.

### [User's Lookup Type Selection for Contribution Posting Now Set As Default Value](#)

On the **Contribution Add** page, the system now sets the user's **Lookup Type** selection as the default. Every time the page is loaded, the default selection is displayed in the filter's text input field. If the user changes the **Lookup Type** selection, that selection becomes the filter's new default value.

# New! Development Manager

## Reports

### Excel Version of the Parish Roster Report Now Includes Diocesan Target Data

The Excel version of the **Parish Roster** report now retrieves target solicitation amounts from the **Diocesan Target** field in family Giving History records and displays them in the newly added **Diocesan Target** column. For your reference, the **Diocesan Target** column is the last column in the report.

### Parish Batch Summary Report Redesigned

We made the following design changes to the **Parish Batch Summary** report:

- The Organization filter in the report setup was reconfigured to allow multiple organization selections, so you can now generate reports that include information on more than one organization.
- In a multi-organization report, each organization's information is now printed on its own page.
- The **Closed ?** column was removed because it was no longer needed. The **Parish Batch Summary** report provides information about closed batches only.
- Instead of a batch grand total, the report now breaks out contribution totals for each batch. These totals are calculated by adding the amounts of contributions posted to each fund included in a batch.

## Pledges

### AutoComplete Functionality Added to Fund and OBO Search Filters

On the **Pledges** page, we added AutoComplete functionality to the **Fund** and **OBO** dropdown filters. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the filter's text input field. When the desired option is displayed, you can select it. Additionally, after you select an option, the system now sets it as the filter's default value.

## Contributions

### AutoComplete Functionality Added to Fund, OBO, and Batch Filters

On the **Contributions** page, we added AutoComplete search functionality to the **Fund**, **OBO**, and **Batch** dropdown filters. This functionality enables you to complete searches faster by displaying suggested matches as soon as you type characters in the filter's text input field. When the desired option is displayed, you can select it. Additionally, after you select an option, the system now sets it as the filter's default value.

## New! Offering

### Imports

#### Organization Links for Accounting Integration Now Fully Implemented

Previously, the organization links between ParishSOFT Accounting and Offering were not completely implemented. As a result, users with access to multiple organizations that had the Accounting integration enabled could only view and modify Accounting fields in Offering for their Primary Assignment organization.

In this release, organization links for the Accounting integration are now fully implemented. Users with the appropriate permissions can now view and modify Accounting fields in Offering for all assignments that are successfully authenticated with ParishSOFT Accounting.

### Settings

#### Diocesan ID Can Now Be Used to Match Contributions in Import File to Donors

On the **Settings > Administration** tab, we added a new option labeled **Diocesan ID** to the **Primary Family or Member Identifier for Imports** group. This option lets users designate the **Diocesan ID** as their preferred method for associating contributions in generic import files with donors in their database.

## Resolved Issues

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### Fixed! Development Manager and Offering

#### Reports

##### Fixed: Calculation Errors and Missing Information in the Pledges Past Due Report

Users reported experiencing these issues with the **Pledges Past Due** report:

- Occasionally, the report included current pledges and pledges that were not past due.
- The amount shown in the **Shortfall Amount** field was sometimes greater than the actual pledge amount.
- Sustaining gifts were sometimes missing from the report.

These issues were resolved.

##### Fixed: Names of Removed Families Appearing in Non-Giver Letter Report

Previously, names of families and members that were removed from the organization's Family Directory records appeared in the **Non-Giver Letter** report. We corrected this issue.

## Fixed! Development Manager

### Reports

#### Fixed: AutoComplete Fund Filter Not Working for Parish Reports

Previously for Parish reports, the AutoComplete **Fund** filter displayed no suggested matches to users as they typed characters into the filter's text input field. We fixed this issue. The filter now provides AutoComplete suggestions.

#### Fixed: AutoComplete Filter Controls Not Working for Some Diocesan Reports

Previously, the following AutoComplete filters displayed no suggested matches as users typed characters into the text input field:

- **Fund** filter (**Appeal Progress** report)
- **Fund** filter (**Pledge Adjustment** report)
- **Fund** and **Month** filters (**Revenue Projection** report)

We fixed these issues. The filters now provide AutoComplete suggestions.

## Fixed! Offering

### Reports

#### Fixed: AutoComplete Fund Filter Not Working for Pledge Reports

Previously for Pledge reports, the AutoComplete **Fund** filter displayed no suggested matches to users as they typed characters into the filter's text input field. We fixed this issue. The filter now provides AutoComplete suggestions.

### Contributions

#### Fixed: Error Experienced When Trying to Save Some Correction Batches

We fixed the issue that caused users to experience an error when trying to save a correction batch containing contributions that came in to Offering through the ParishSOFT Giving integration.

# 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)