

PARISHSOFT DEVELOPMENT MANAGER AND OFFERING v4.9.20 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.9.20 of ParishSOFT Development Manager and Offering.

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What's New in Version 4.9.20

New! Development Manager and Offering

Reports

Whitespace Between Address Block and Salutation in Contribution Statement Reduced

In the letter accompanying both family and member contribution statements, we removed the unnecessary white space between the address block and the salutation. This change reduces the likelihood that the content of longer letters is pushed onto the next page.

Batches

Quick Posting Feature for Batch Contributions Now Available

In both Development Manager and Offering, the process of entering contributions just got faster with a new feature called "Quick Posting." As the name implies, Quick Posting is specifically designed to speed up your workflow by making the data entry process take a lot less time.

Depending on the volume of contribution records that must be entered, getting data into your system can be a time-consuming process. Data entry errors are bound to happen. With the traditional posting method, data is validated as it is entered into each field in a contribution record, and the user must correct any errors before saving the contribution. While this method is effective at reducing data entry errors, it comes with consequences: errored entries can significantly interrupt and slow down a user's workflow and productivity. With Quick Posting, the system checks the values in a contribution record after all the data in a record is entered. Any errors that are found do not need to be corrected before the contribution is saved. The user's workflow is not interrupted, allowing them to complete data entry and go back later to correct any errors the system flags. With the Quick Posting method, a user especially proficient at data entry can enter contribution data as quickly as their skills allow.

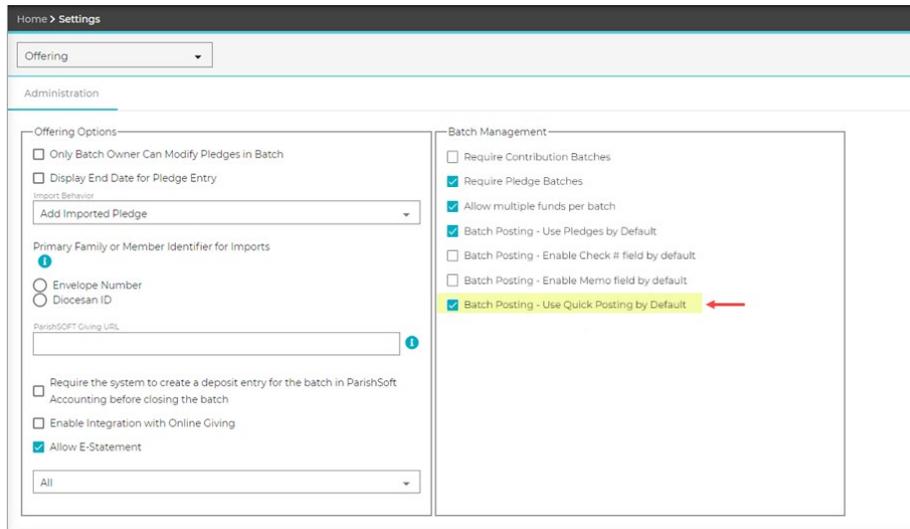
Be advised that Quick Posting does not replace the traditional posting method in either module. Rather, this new functionality provides an alternative method of contribution entry that a user can choose based on the situation and their particular skills and preferences.

The next sections show you how to set Quick Posting as the default method for posting contributions and how to create a batch that uses Quick Posting.

Making Quick Posting the Default Posting Method for Batches

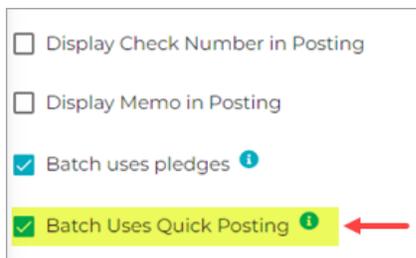
Both Development Manager and Offering provide an option to make Quick Posting the default method for posting contributions to all new batches. This option is configured globally by a user with admin access. In Development Manager, this is a user with **Development Admin** permission and in Offering this is a user with **Organization Admin** permission. If you are such a user, follow this procedure to configure Quick Posting as the default method for posting contributions to batches.

1. Select **Settings** to open the **Settings** page.
2. In the **Batch Management** group on the **Administration** tab, select the **Batch Posting - Use Quick Posting by Default** option, as shown below:



3. In the upper-right corner, click  to save the setting.

All new batches are now configured to use Quick Posting by default. As shown in the following illustration, the **Batch Uses Quick Posting** option in the batch form is pre-selected when the parish user creates a new batch:



The user can now choose whether to use Quick Posting. To use it, they must keep the **Batch Uses Quick Posting** option selected. If they prefer to use the traditional posting method, they must deselect the option.



After the batch is saved, the setting for the Batch Uses Quick Posting option cannot be changed.

Creating a Quick Posting Batch

1. Open the **Batches** page.
2. In the toolbar, click  (**Add New Batch**).
3. Enter details for the batch. Make sure that the **Batch Uses Quick Posting** checkbox selected.
4. Click  to save the batch.

The batch is saved to the **Batches** page with a status of **Open**. You can now post contributions to the batch.

Posting Contributions to a Batch That Uses Quick Posting

The process for posting contributions to a batch that uses Quick Posting is essentially the same as that used for a batch that uses the traditional posting method. You can find instructions for posting contributions to a batch in the Development Manager and Offering Help files.

The main difference between the two methods is where in the process the system checks the validity of your data. This difference is explained in this earlier release notes entry: [Quick Posting Feature for Batch Contributions Now Available](#).

Resolved Issues

Development Manager

Pledges

Fixed: Donor Search by Family Name Creates a Pledge Record with No Value in OBO Field

When searching for a donor by family name, the user can create a pledge record for the found family, but the record that is created is missing a value in the **On Behalf Of** (OBO) field.

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)