ParishSOFT Development Manager and Offering v2.5 Release Notes

These release notes keep you informed about the latest features and changes available in Release v2.5 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.5

Development Manager

Reports

Organization ID Column Added to Excel Version of Parish Refund History Export

The Excel version of the **Parish Refund History** export now contains a column labeled **Organization ID**. The column shows the unique identifier assigned to each parish organization. The column shows the ID value selected by the diocese on the **Settings** page. Specifically:

> *Note*
>
> *Local organization IDs for parishes are set in Diocesan Suite > Administration > Organizations. The Local Org ID field in each organization's record is where the value is saved.*

- If the **Use Local ID** setting is selected, the column shows the local ID assigned to the organization by the diocese.

- If the **Use ParishSOFT ID** setting is selected, the column shows the ID assigned to the organization by the ParishSOFT system.

Changes Made to Content and Format of the Batch Postings List Report

The **Batch Postings List** report provides a list of postings made to a batch along with the details of each posting. To improve usability of this report, we made the following changes:

- Added the name of the active organization to the report header.

- Modified the order in which postings are listed to match the list order on the **Batches > Postings** page.

- Improved formatting so that each column on the Contributions and Pledges tabs on the **Batch > Postings** page now occupies one column in the report. The report contains no merged or skipped columns.

Parish Master Report Updated

Per customer request, we made several changes to the Parish Master report, specifically:

- The **Refund Amount** field was expanded to accept seven-digit numbers.

- The amount shown in the **Refund Expected** field is based on the amount paid if the amount paid exceeds the amount pledged.

- The amount shows in the **Overpayment** field is always a positive number.

- If a pledge balance is negative, the balance shown is 0.

- The sum of values in the **Balance** and **Overpayment** fields reflect the values in those fields.

- In the PDF version of the report, the **Formal Salutation** column was removed from the **Giver Details** section.

- In the PDF version of the report, an **Overpayment** column was added to the **Giver Details** section. The value in this column is always a positive number.

- In the Excel version of the report, two columns were added: **Overpayment** and **Formal Mailing Name**.

Batches

Pledge Amount Field in a New Batch Record Auto-Populated with $0

To improve speed and efficiency when adding a new batch, we auto-populated the **Pledge Amount** field with a **0** (zero dollars).

Pledges

Width of OBO Field in Pledge Details Increased

Per customer request, we increased the width of the **OBO** field in pledge details. The field now accommodates 50 characters.

Offering

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Changes Made to Content and Format of the Batch Postings List Report

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Batches

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Settings

Family Last Name and Envelope Number Options Added to Default Family Lookup List

To enable users to post transactions to batches by envelope number or family last name, we added **Envelope Number** and **Family Last Name** to the **Batch Posting – Default Family Lookup** list (in the **Batch Management** section):

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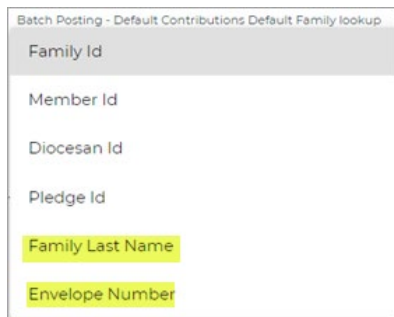
Resolved Issues

Development Manager

Reports

Fixed: Parish Master Excel Export Sometimes Missing the Summary Page

Previously if the user specified no date range in the setup for the **Parish Master** report, the Excel export was sometimes missing the **Summary** page. We fixed this issue. With no date range specified, the Excel export now always provides a **Summary** page showing data for each organization.

Fixed: Contribution Summary Section of Batch Postings List Displays Wrong Paid Count

Previously in **Batch Postings List** report, the **Paid Count** column showed the total paid count for the entire batch instead of the total paid count for each fund. We fixed this issue.

Fixed: Contribution Summary by Fund Report with Same Start and End Date Won't Run

Previously if the user specified the same date in the **Start** and **End** date fields in the setup for the **Contribution Summary by Fund** report, the report did not run. We fixed this issue. The report now accepts the same date in both fields, enabling users to successfully run the report for the same day.

Fixed: Parish Roster Report Incorrectly Displays Diocesan ID

The **Parish Roster** report was modified to correctly show the Family ID instead of the Diocesan ID

Imports

Fixed: Lockbox Import Divide by Zero Error Sometimes Experienced

Some users reported experiencing a **Divide by Zero** error when attempting to import a lockbox file. This error was resolved.

Funds

Fixed: Fund Search Using Generic Search Filter Does Not Reset to Page 1 of Results

Users reported that the generic search filter in the **Funds** page toolbar sometimes missed funds on Page 1 of the **Funds** list if the search was started on Page 2 or later. We fixed this issue. The search now resets the user's view to Page 1, so that any funds listed on the first page are now visible.

Fixed: Account Number Sort on Fund List Yields Wrong Output

Previously, data sorted in the **Fund** list by the **Account Number** incorrectly returned a list of funds sorted by the **Fund ID**. We fixed this issue.

Fixed: Fund Account Number Column Missing from Fund List Export

Previously, Excel and PDF versions of the Fund List export were missing the **Fund Account** column. We fixed this issue.

Batches

Fixed: Batch Search Using Generic Search Filter Does Not Reset to Page 1 of Results

Users reported that the generic search filter in the **Batches** page toolbar sometimes missed batches on Page 1 of the **Batches** list if the search was started on Page 2 or later. We fixed this issue. The search now resets the user's view to Page 1, so that any batches listed on the first page are now visible.

Contributions

Fixed: PDF Export for Contributions Not Working

Previously on the **Contributions** page, the Export to PDF process failed export the selected contributions to a PDF file. We fixed this issue.

Fixed: Fund Field Blank in Contribution Details

We fixed the issue that prevented the fund from showing in the **Fund** field in **Contribution Details**.

Fixed: 'Select All' Filter Ignores Other Non-Date Filters

Previously when the user applied a non-date filter (for example, **Fund** and **Envelope Number**) to the **Contribution** list in combination with the **Select All** filter, and then created a correction batch, the resulting batch was missing some contributions that met the filter criteria. We fixed this issue. When the **Select All** filter is added, any non-date filters applied to the **Contribution** list are no longer ignored.

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Imports

Fixed: Newly Setup ParishSOFT Giving Integration Sometimes Produces Errors

Some users with a newly setup Offering to ParishSOFT Giving integration reported experiencing errors when attempting to import records. We found and fixed the source of this issue.

Fixed: Import History Not Visible to Organization Administrators

We fixed this issue that prevented users with Organization Admin login credentials from being able to view import records on the **Import History** tab.

Fixed: Generic Import Process Duplicates Contributions Attached to Pledges

Users reported finding duplicate contributions in an import batch after using the generic import process to import pledges with initial contributions into Offering. We fixed the cause of the duplications.

Fixed: Online Giving Integration Ignores Start Date Filter

Previously, the Online Giving Integration process ignored the date in the **Start Date** field and imported contributions and pledges having a date one day prior to the user-specified start date. We fixed this issue.

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Fixed: Correction Batches Created by Parish Administrators Show the Diocese As Owner

Previously, correction batches created by parish administrators incorrectly showed the diocese as the batch owner. We fixed this issue.

Contributions

Fixed: PDF Export for Contributions Not Working

Previously on the **Contributions** page, the Export to PDF process failed export the selected contributions to a PDF file. We fixed this issue.

Fixed: Missing Fund Name in Contribution Details

We fixed the issue that caused the fund name to be missing in **Fund** field in **Contribution Details**.

Fixed: 'Select All' Filter Ignores Non-Date Filters

Previously when the user applied a non-date filter (for example, **Fund** and **Envelope Number**) to the **Contribution** list in combination with the **Select All** filter, and then created a correction batch, the resulting batch was missing some contributions that met the filter criteria. We fixed this issue. When the **Select All** filter is added, any non-date filters applied to the **Contribution** list are no longer ignored.

Contacting ParishSOFT

If you have questions or require support while using an application, use any of the following methods to contact us:

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✉	support@parishsoft.com
☎	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)

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