

PARISHSOFT DEVELOPMENT MANAGER AND OFFERING V2.25 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.25 of ParishSOFT Development Manager and Offering.

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What's New in Version 2.25

New! Development Manager and Offering

Imports

Import Tab Removed from Integration Import Page

The **Import** tab, which provided functions that allowed users to import data from ParishSOFT's legacy Online Giving product, was removed. Since this product has been retired, the tab is no longer needed. For now, users can view previous imports from Online Giving on the **History** tab on the **Integration Import** page.

Batches

Message Displayed for Bulk Batch Status Changes Revised to Improve Clarity

After the user confirms a request to bulk change the status of selected batches, the operation begins and runs in the background. As such, users are not directly aware of the status of a running operation—which may not start immediately—or when it is completed.

To improve the user experience, we revised the message presented to users after they confirm a bulk status change request. Users are now informed that the operation is working behind the scenes and that their changes may not happen immediately but will be visible after the operation is completed. The message also lets users know where to go to check the progress of an operation.

Pledges

Message Added to Alert Users When Changes Made to Sustaining Gift Amount or Frequency

When attempting to change the amount or frequency of a sustaining gift, users are now presented with a message informing them that if they confirm the change, the system will end the existing gift and replace it with a new gift that matches the existing gift's modifications.

New! Development Manager Only

Reports

Pledge ID and Schedule Payment Amount Added to Pledge Statements

We added the Pledge ID and scheduled payment amount to statements in the Pledge Statement report. Some lockbox services use this information, which existed in legacy DDM pledge reports, to expedite their processes using Optical Character Recognition (OCR) technology.

You can find the Pledge ID and schedule payment amount at the bottom of each pledge statement. When viewing a scheduled payment amount, take note of the following formatting convention: The amount includes the digits after the decimal point but is printed with no decimal separator. For example, a \$20.75 payment is printed as 2075, and a \$125.00 payment is printed as 12500.

Resolved Issues

Fixed! Development Manager and Offering

Batches

Fixed: 'Batch Bulk Change Status' Process Experiences an Error But Displays No Message

Previously, the **Batch Bulk Change Status** process sometimes experienced an error but displayed no message to alert the user about the problem. We fixed this issue. If the process experiences a problem, the system displays a notification message in the **Batch Bulk Change Status** area on the **Batches** page.

Fixed: Posting Date and Date Filter Fields in Batch Details Now Require a Four-Digit Year

In **Batch Details**, users are now required to enter dates with four-digit years into the default posting date field and the date filter fields. For example, to enter the date July 4, 2022, type 7/4/2022. This change brings the posting fields in Batch Details in line with posting fields throughout the application. Likewise, we modified historical dates for contributions to ensure that the stored date is in four-digit format.

Contributions

Fixed: Lifetime Giving Button Visible to Users Without Permissions

We fixed the issue that enabled staff users without the proper permissions to view the Lifetime Giving button thereby allowing them access to families' giving history. Only users who have **View + Giving History** permissions assigned to their login credentials can see this button and access Giving History records.

Fixed! Development Manager Only

Reports

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 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: Users Can't Print Body of Statement in the Selected Font Size

The text editor in the **Contribution Detail Statement** report allows users to select different font sizes for the body of statement text. Previously, the system ignored the user's selection and always printed the body of statement in 10-point font. We resolved this issue. The body of statement is now printed in the font selected by the user.

Imports

Fixed: New Empty Batches Resulting from Pledge File Imports from Online Giving

Previously, the import process for Online Giving created a unique batch for each fund in a pledge file imported into Development Manager. Some of the newly created batches were empty. We fixed this issue. Instead of using the fund to determine how many batches to create, the import process now uses the data in the import file to make the determination.

Pledges

Fixed: Can't Save Pledge Record Due to Incorrect Total Designation Percentage Calculation

Users reported that sometimes they could not save a pledge record with designations because the pledge validation process incorrectly calculated the total designation percentage as over 100%. We resolved this issue. We improved the precision of the calculations of designation percentages so that pledges can now be saved without error.

Fixed! Offering Only

Reports

Fixed: Wrong Name Sometimes Displayed in Contribution Summary by Donor Report

We resolved an issue that sometimes caused the family name instead of the member name to be displayed in the **Contribution Summary by Donor** report.

Fixed: Non-Giver Letter Includes Deleted Families


Previously, the **Non-Giver Letter** report incorrectly included families whose records were removed by the parish. Additionally, the families that were included in the report were identified by Family DUID instead of by envelope number. Both issues were corrected.

Fixed: Contributions Sometimes Incorrect in Contribution Summary by Donor Report

We fixed an issue in the **Contribution Summary by Donor** report that caused contributions to be reported incorrectly when an unrelated family and member had the same ID value.

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)