PARISHSOFT DEVELOPMENT MANAGER AND OFFERING v2.38 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v2.38 of ParishSOFT Development Manager and Offering.

Table of Contents

New! Development Manager and Offering

Reports

User Column Added to Audit Log Report

We added a new column labeled **User** to the **Audit Log** report. This column shows the first and last name of the user who triggered the audit event.

(Canadian Organizations Only) Receipt Type Dropdown Added to Tax Receipt Report

The **Tax Receipt** report setup now features a new dropdown list called **Receipt Type**. The list provides two options that enable users to indicate the type of contribution that a tax receipt was issued for:

- **Regular**: in all versions of the report (Official, Preview, and Excel), selecting this option generates a separate receipt for each donor. The receipts record cash contributions only. Receipts for this contribution type do not include a **Description** field. Other information contained on the receipts is determined by the criteria and filters the user selects in the report setup.

- **Stocks and Gifts in Kind**: in all versions of the report (Official, Preview, and Excel), selecting this option generates a separate receipt for each contribution. The receipts record non-cash contributions only. Examples of non-cash contributions include stock gifts, stocks and security, gifts in kind (tangible goods like jewelry, art, clothing), to name a few. Receipts for this contribution type include a **Description** field that provides details about the non-cash gift that was donated. Other information contained on the receipts is determined by the criteria and filters the user selects in the report setup.

Margin Settings Widened in Letter Accompanying Tax Receipts

In the letter accompanying tax receipts, we increased the left and right margins from ¾ of an inch to 1 inch so that they now conform to the standard format for a business letter.

Pledges

Menu Added to Add Button on Pledges Page to Prevent Accidental Creation of Sustaining Gifts

Previously when the **Require Pledge Batches** setting was enabled for an organization (in the **Batch Management** group on the **Settings** page), users not mindful of the restriction accidentally added a sustaining gift record, mistakenly thinking that they were adding a pledge. To prevent users from making this mistake, we added the menu (shown below) to the **Add** button on the **Pledges** page. When the user in an organization that requires all pledges be entered by batch tries to add a pledge outside of a batch, the **Pledge** option on the menu is disabled to prevent selection, and a tooltip is displayed to explain why.
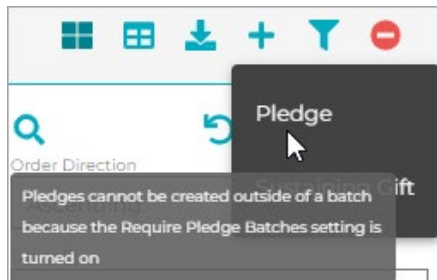
Contributions

(Canadian Organizations Only) Description Field Added Contribution Entry and Edit Pages

On the batch and non-batch **Contribution Add** and Edit pages, we added a **Description** field. The field is enabled and required only when the user selects **Stock and Gifts in Kind** as the contribution type.

New! Development Manager

Reports

New Option to Display 'On Behalf Of' (OBO) Column on Contribution Detail Statements

In the setup for the **Contribution Detail Statement** report, we added an option to the **Column Selection and Ordering** tab (located in the **Report Contents** section) that enables you to add the **On Behalf Of** (OBO) column to your contribution statements. When added to a statement, this column provides the following information for each contribution:

- If the contribution is tied to a pledge, shows the name of the OBO organization for the pledge.

- If the contribution is not tied to a pledge, shows the name of the OBO organization for the contribution.

- If the contribution is not assigned to an OBO organization, the column is empty.

For instructions on adding the **On Behalf Of** column to contribution statements, refer this topic in the Development Manager Help: *How to Select and Order Information in the Contribution Detail Statement Report*.

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)