

VERSION 5.0.11 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in release v5.0.11 of ParishSOFT Family Suite.

Contents

- What’s New in Version 5.0.112
 - A More Modern Look and Feel to ParishSOFT Family Suite.....2
 - Module-Wide Enhancements Made to the User Interface2
 - My Own Church4
 - My Education.....4
 - Religious Education4
 - Registration4
 - Attendance6
 - Reports6
 - Settings.....6
 - Development Manager and Offering8
 - Module-Wide8
 - Funds.....8
- Issues Resolved in Version 5.0.119
 - My Own Church9
 - Family Directory.....9
 - Family List9
 - Religious Education9
 - Students & Volunteers.....9
 - Registration9
 - Offering.....10
 - Batches10
 - Development Manager10
 - Reports10
 - Development Manager and Offering10
 - Funds.....10
 - Administration10
 - Merge10
- Contacting ParishSOFT11



What's New in Version 5.0.11

A More Modern Look and Feel to ParishSOFT Family Suite

Since our first phase of user interface updates to ParishSOFT Family Suite, we have been continuing our efforts to make all modules in the Suite easier to use and more visually appealing. We have also made enhancements to core components to ensure that similar elements across all modules not only look the same but also behave the same. As a result of the changes made, you will find that the knowledge you gain using controls and performing tasks in one module is more easily transferable to other modules in the Suite, allowing you to work more efficiently and have a more enjoyable experience.

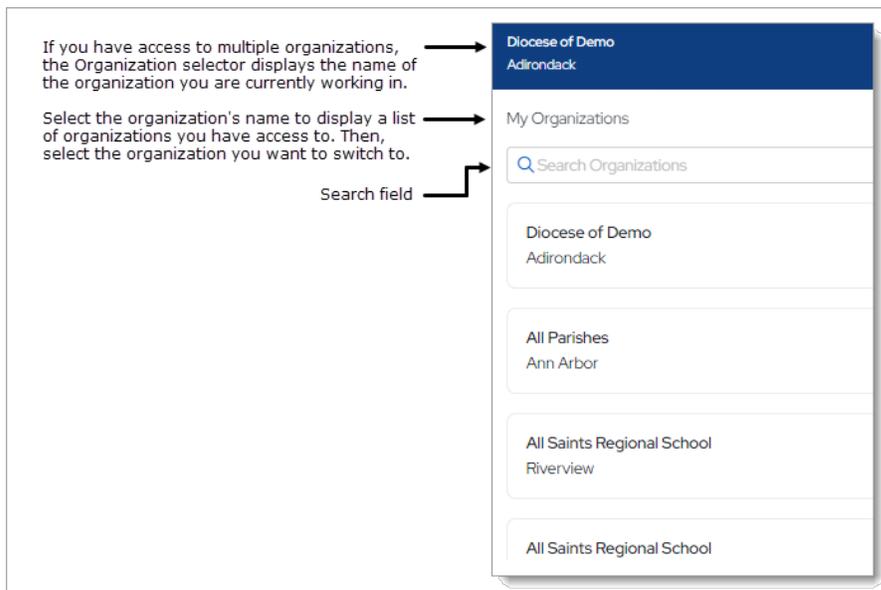
Module-Wide Enhancements Made to the User Interface

In response to valuable feedback customers like you took time to provide, we made the enhancements listed below to the user interface within each module in ParishSOFT Family Suite.

Organization Selector

Minor modifications were made to the design and behavior of the Organization selector, located in the header above the navigation menu.

- If you have access to one organization, the Organization selector displays your organization's name. The select component is disabled (cannot be clicked) because you have limited access.
- If you have access to multiple organizations, the Organization selector shows the name of the organization you are working in. Click the organization's name to display a list of the organizations you have permission to access. If the list is long, either type the organization's name into the **Search Organizations** field (see illustration below) or use your mouse to scroll through the list to find the organization you want. To close the Organization selector, click your mouse anywhere outside the **My Organizations** list.



- **Logout Process**

The logout process is now the same in every module. To log out, click your initials badge in the upper-right corner and select the **Log Out** option as shown below.



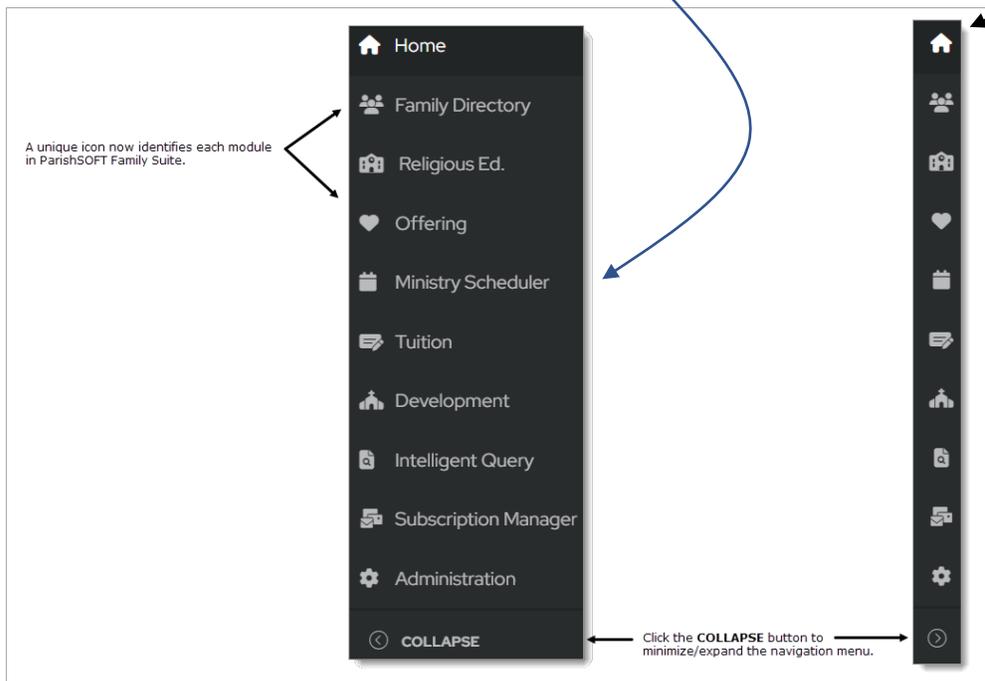
- **Page Design and Style**

For uniformity, the same font style is now used for text elements on all pages. Every page features a standard blue header. For consistency, the same blue color is applied to action buttons, links, and other major user interface components. Additionally, the ParishSOFT logo was removed from the page header and was replaced with this icon:  (**Home**).

- **Navigation Menu**

On the **Home** page navigation menu (shown below), icons now appear next to each module's name. These icons not only add visual appeal and but also help with module recognition.

Additionally, a collapsible feature was added to the navigation menu to enable you to minimize it, thereby expanding the viewing area on any page. By default, the menu is in the expanded state. To minimize the menu, click . Click  to return it to the expanded state.



My Own Church

My Education

Fee Payments for Religious Education Classes Can Now Be Made Online at the Time of Registration

If allowed by their church, members can now pay registration fees for religious education classes easily and securely within the online registration process. Instructions for registering for classes and paying registration fees are provided in this topic in the My Own Church for Members Help: "How to Register Online for Religious Education Classes."

Religious Education

Registration

Registration Fee Payments Can Now Be Processed Through a Church's ParishSOFT Giving Account

As illustrated below, when the **Payments** option is enabled in the Online Registration setup, a church with a ParishSOFT Giving account can now select ParishSOFT Giving as the fee payment processor:



Your church must have a ParishSOFT Giving account to process registration fee payments through ParishSOFT Giving. To sign up for an account, go to <https://www.parishsoft.com/giving-for-parishes/#giving-signup>.

If your church wants to use ParishSOFT Giving to process registration fee payments, follow the instructions under Step 2 in this topic in the Religious Education Help: "How to Set Up Online Registration for Your Church."

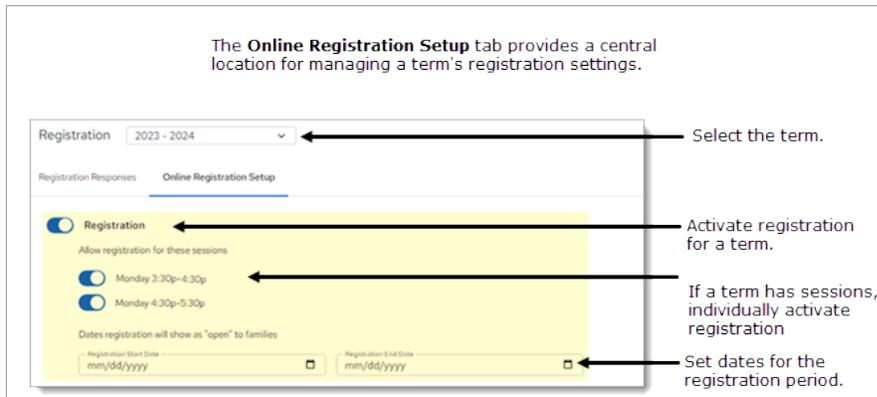
Online Registration Setup Settings Consolidated into a Single Location

To simplify the setup process for online registration, we grouped all the settings required to manage the setup and placed them on the **Online Registration Setup** tab on the **Registration** page. The **Show in Online Registration** functionality in a term's lookup record (see illustration below) was moved as part of our efforts to consolidate setup elements into one location.



As shown below, admin users can now complete the following online registration setup tasks on the **Online Registration Setup** tab:

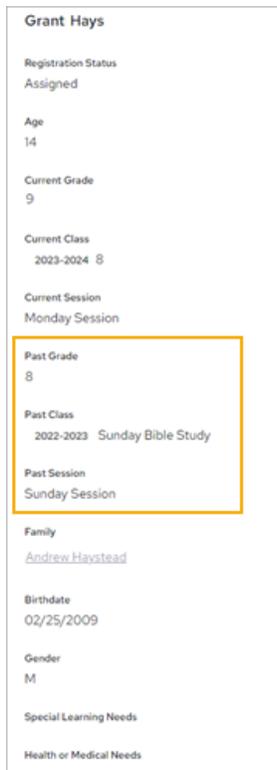
- Select a term and activate online registration.
- Allow registration for specific sessions within a term.
- Set dates for the term’s registration period.



If you need instructions for setting up online registration, go to this topic in the Religious Education online Help: "How to Set Up Online Registration for Your Church."

Slide-Out Panel on Registration Responses Grid Now Provides Previous Enrollment Information

As illustrated below, in the **Registration Responses** grid, the slide-out panel displayed when a student’s name link is selected now shows the previous term’s enrollment information, if available. This information can help you make decisions when registering students for current classes. Note that if a student was not enrolled in a previous term, the **Past Grade**, **Past Class**, and **Past Session** fields in the panel are blank.



Family Option for Adding Students/Volunteers No Longer Requires the User to Assign All Family Members to a Class

Previously, if the user selected the **Family** option when adding students or volunteers to a class, the submitted form was not accepted if any member of the student's or volunteer's family was not assigned to a class. We removed this requirement. Assigning all family members to classes is no longer required when the **Family** option is selected.

Attendance

Column Headers on Attendance Page Grid Now Remain Visible When User Scrolls

On the **Attendance** page, the column headers in the grid now remain visible when you scroll through the list of records.

Reports

Updated Registration Report Now Varies Number of Student Information Blocks According to Need

Previously, the **Registration Report** included five **Student Information** blocks regardless of how many students were in a family. We updated the report so that it now includes the exact number of **Student Information** blocks a given family needs for registering their students.

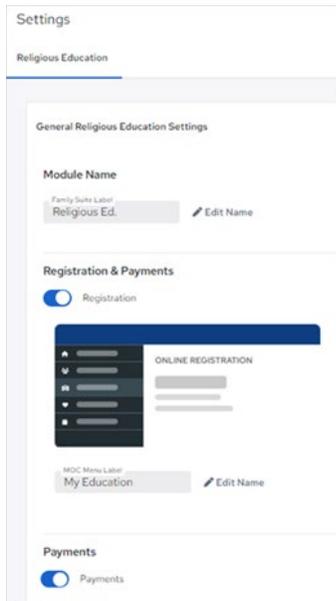
Settings

Minor Enhancements Made to Settings in the General Religious Education Settings Group

On the **Settings** page, shown below, we made minor enhancements to elements in the **General Religious Education Settings** group.

Note

To access the **Settings** page, click  in the upper-right corner on any page.



These enhancements enable you to customize your church's online registration process.

- **Module Name**

The **Module Name** field lets you change the name of the module shown in the ParishSOFT Family Suite menu. By default, the module's name is set to **Religious Education**. If you want to change the name of the module, click  and type and save a new name.

Note

*Renaming the module's name in the ParishSOFT Family Suite menu was a feature previously located on the **Module Settings** page in the **Administration** module. For your convenience, we removed this feature from the **Administration > Module Settings** page and placed it here.*

- **Registration & Payments**

The **Registration** button toggles visibility of the **My Education** option in the **My Own Church (MOC)** menu in the member portal.

- ❖ When set to **Off**, the **My Education** option is not displayed on the **MOC** menu. Select this option if your church does not offer religious education classes or if your church does not offer online registration for religious education classes.
- ❖ When set to **On**, a preview of the menu showing the **My Education** option is displayed. If desired, you can change the name of the module displayed to members in the **MOC** menu. To do this, click  and save the new name. A preview of the **MOC** menu is displayed showing the new name you provided.

- **Payments**

The **Payments** button toggles visibility of the **Payment** section on the **Registration > Online Registration Setup** tab.

- ❖ When set to **Off**, users do not see the **Payment** section when setting up online registration for a term. Select this option if your organization does not require fee payments when members register students for classes.
- ❖ When set to **On**, the **Payment** section is displayed to enable the Admin user to specify the payment method and define class fees and discounts when creating an online registration form.

Development Manager and Offering

Module-Wide

Card View Layout Option Removed

In previous releases, **Card View** functionality was used to display **Development Manager** and **Offering** data in separate containers that resembled cards. In this release, we removed **Card View** as a layout option. We made this decision for a couple of reasons. First, we found that **Card View** does not show information as well as **Grid View** on smaller interfaces (phones and tablets). Secondly, we are guided by principles of simplicity and consistency in design across all of our products. **Card View** functionality is not present in other modules. Therefore, to achieve consistency we removed it from **Development Manager** and **Offering**.

Funds

Scrollbar Displayed When Necessary to Facilitate Viewing of Fund Details

On smaller monitors and monitors set to a high zoom level, all the fields in a fund record do not fully fit to the screen. As a result, some users are either forced to lower the zoom level or tab through the fields to view all of a fund's details. To improve the user experience, we added a scrollbar that displays whenever fields in a fund record are cut from view. The scrollbar enables the user to quickly drag content outside the bounds of the screen into view.

Issues Resolved in Version 5.0.11

My Own Church

Fixed: Member Records with Changes Pending Approval Not Visible to All Associated Parishes

When change requests submitted through a member's **My Own Church** are pending approval, the system incorrectly hides the member's record from all other parishes the family is associated with. The member's record remains hidden until a church administrator approves the change.

Family Directory

Family List

Fixed: Parents' Cell Phone Field Incorrectly Contains the Family's Primary Phone Number

In **Family Details**, the parents' **Cell Phone** field incorrectly contains the family's primary telephone number.

Religious Education

Students & Volunteers

Fixed: Tooltip Text on Student's Special Needs Flag Not Updated As Expected

Changes made to the text in the **Special Needs** field in a student's Family Directory record are not updating the tooltip text displayed on the student's Special Needs flag on the **Students** page.

Fixed: Sort Function on Column Headers in Volunteers Grid Not Working

Users cannot sort records in the **Volunteers** grid because the Sort function on the column headers does not work.

Fixed: Search Process Used to Add Students and Volunteers Occasionally Not Working As Expected

On the **Students** and **Volunteers** tabs, the search process used to add records is not working, specifically:

- After displaying initial results, the search process occasionally refreshes and redisplay the names of all individuals instead of those matching the search criteria.
- Students belonging to families registered at other organizations are sometimes missing from search results.
- Students whose member status is set to anything other than Active are sometimes missing from the search results.

Registration

Fixed: Error Generated When Users Remove Students Added to Classes Through Online Registration

Users report experiencing an error when trying to remove students assigned to classes through the Online Registration process.

Offering

Batches

Fixed: Cannot Use Quick Posting to Post Contributions to a Fund That Requires Pledges

The Quick Posting process will not post contributions for families that have a pledge to a fund that require pledges.

Fixed: Bulk Close Batch Process Not Working in Organizations with Accounting Integration Enabled

Users in organizations with the ParishSOFT Offering to ParishSOFT Accounting integration enabled experience an error when trying to bulk close batches.

Fixed: Selected State of the 'Deposited' Checkbox Sometimes Not Working As Expected

In organizations with the ParishSOFT Offering to ParishSOFT Accounting integration enabled, closing a batch that has the **Deposited** checkbox selected sometimes causes the batch to be deposited into ParishSOFT Accounting.

Development Manager

Reports

Fixed: Filters Missing from the Designation Details Report Setup

In the **Parish Reports** group, users cannot generate a custom **Designation Details** report because these filters are missing from report setup: **Organization Name Format**, **Details For**, **Choose an Option**, and **End Date**.

Development Manager and Offering

Funds

Fixed: Staff Filter on the Permissions Tab in Fund Details No Longer Filtering As the User Types

As the user enters a name into the staff filter field on the **Permissions** tab in **Fund Details**, the filter should—but does not—display results as each letter in the name is typed.

Administration

Merge

Fixed: 'What to Do' Menu for Multiple Family Merges Missing 'Merge With' Options Required to Merge Additional Duplicate Family Members

For multiple family merges, if any duplicate members in the first duplicate family are added as new members to the Permanent Family, the **What to Do** menu for subsequent duplicate family members is missing the **Merge with** option for members in the Additional Duplicate Family. The only option available for selection is **Add As New**.

Contacting ParishSOFT

If you have questions or require support while using the 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)