

## VERSION 5.0.22 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in release v5.0.22 of ParishSOFT Family Suite.

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# What's New in Version 5.0.22

## Religious Education

### Reports

#### Additional Columns Added to Roster Export (CSV) Report

In the **Reports** list, the standard **Roster Report (CSV)** will now include additional details for optimized reporting. This includes **Family Primary Phone, Family Emergency Phone, Father Cell Phone, Father Work Phone, Mother Cell Phone, Mother Work Phone, Responsible Adult Cell Phone, Responsible Adult Work Phone, Family Address, Responsible Adult Address, Baptism Completed, Baptism Date, Confirmation Completed, Confirmation Date, Eucharist Completed, Eucharist Date, Reconciliation Prep Completed, Reconciliation Prep Date.**

Note: If no data exists in a field, the corresponding field will be empty in the export file.

## Development Manager & Offering

#### Pledge Statement Report Wizard Enhanced Filtering Option

As shown below, we added a new checkbox below the **Only pledges with a balance** with a corresponding **Amount Field**. This will allow you to set a predetermined balance below a specific total to be omitted from Contribution Statement generation. By checking the **Minimum Balance** checkbox, you can enter, edit, or remove the **Amount Field**.

The screenshot shows the 'Donor Reports' interface for the 'Pledge Statement Report' wizard. A red box highlights the 'Only pledges with a balance' checkbox, which is checked. Below it is the 'Minimum Balance' field, also checked, with the value '.01' entered. Other options include 'Include remittance slip', 'Add Scanline 2', 'Add Spanish Translation', and 'Remove Payment Options'. The right side of the screen shows a list of family groups to select from, including Name, Active, Alumni, Associated Non-Parishioner, Contributor Only, Deceased, Friend, and Inactive.

Note: The two new fields will be disabled unless the Only pledges with a balance checkbox is checked.

Note: Values entered in the **Amount Field** will need to be greater than \$.01.

### Pledge Statement Report Wizard Enhanced Spanish Text Option

You now have the option that will add Spanish translation to a limited number of Fields on the Pledge Statement.

As shown below, we added a new checkbox below the **Only pledges with a balance** and **Include remittance slip** checkboxes. When enabled, this new **Add Spanish Translation** checkbox will facilitate translations in the most essential fields on Remittance Slips.

Donor Reports

Select a Donor Report  
Pledge Statement Report

Select a Fund \*  
Statement Month \*  
Statement Year \*

Select an Option \*  
Signature: Sign test  
Letterhead: Use Organization Name...  
Body of Statement: End of Year  
Printed Name: PrintedName  
Family Registration \*: Both  
Family Workgroup

Select one or more Family Groups  
 Name  
 Active  
 Alumni  
 Associated Non-Parishioner  
 Contributor Only  
 Deceased  
 Friend  
 Inactive

Only pledges with a balance  
 Minimum Balance  
 Include remittance slip  
 Add Scanline 2  
 Add Spanish Translation  
 Remove Payment Options

Note: this new Field will only be available for selection if the **Include remittance slip** checkbox is selected.

### Option to Remove Payment Options from Pledge Statements

You now have the option that will allow you to remove Cash and Check payment options from displaying on remittance slips of Pledge Statements, should you wish to limit payment options for Pledges. As shown below, a **Remove Payment Options** checkbox has been added to the **Pledge Statement Report Wizard**.

Pledge remittance slips will appear as shown below.

----- Please return this portion to your organization -----

Env. # 2706, Family ID 146868  
abbott, Abraham and Amaya  
Prospect Heights, IL 60070  
Pledge ID # 292898

Next Gift Scheduled: \$250.00  
Fund: 1Church Contributions  
Due On: 12/4/2023

Change in Address  
If you have moved please provide us with your new address on the other side of this slip.

Cash  Check  
\*\* Please make check payable to Divine Redeemer Parish

Check # \_\_\_\_\_  
Amount Enclosed \_\_\_\_\_

292898 25000

### Pledge Statement Report Wizard Remittance Printing with Scanline 2 Value

You will now have the option to print remittance slips on Pledge Statements with Scanline 2 values for easier processing of the returned Remittance Slips.

As shown below, we added a new checkbox below the **Only pledges with a balance** and **Include remittance slip** checkboxes. When enabled, this new **Add Scanline 2** checkbox will allow unique scanlines to be generated and printed on remittance slips. Scanline parameters will print the scanline ¼" to the bottom of the remittance slip, with no less than a ½" margin from the left of the remittance slip to the scanline and from the right of the remittance slip to the scanline.

The screenshot displays the 'Donor Reports' configuration page. At the top, there is a dropdown menu for 'Select a Donor Report' set to 'Pledge Statement Report'. Below this are several sections of controls:

- Select a Fund \*** (dropdown)
- Statement Month \*** (dropdown)
- Statement Year \*** (text input)
- Only pledges with a balance** (checkbox, unchecked)
- Minimum Balance** (text input)
- Include remittance slip** (checkbox, checked)
- Add Scanline 2** (checkbox, checked) - This checkbox is highlighted with a red box.
- Add Spanish Translation** (checkbox, unchecked)
- Remove Payment Options** (checkbox, unchecked)

Other sections include:



- Select an Option \*** (dropdown) with options: Signature (Sign test), Letterhead (Use Organization Name...), Body of Statement (End of Year), Printed Name (PrintedName), Family Registration \* (Both), and Family Workgroup.
- Select one or more Family Groups** (list with checkboxes): Name, Active, Alumni, Associated Non-Parishioner, Contributor Only, Deceased, Friend, and Inactive.

Note: **Scanline 2** is simply the naming convention currently available in Development Manager and Offering. There is no Scanline/Scanline 1.

Note: This new Field will only be available for selection if the **Include remittance slip checkbox** is selected.

# Contacting ParishSOFT

If you have questions or require support while using any module in ParishSOFT Family Suite, use any of the following methods to contact us:

	<a href="https://parishsoft.com/support/">https://parishsoft.com/support/</a>
	(866) 930-4774 (Main) (734) 205-1011 (Fax)