

ParishSOFT Accounting

Ask the Expert

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ParishSOFT



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Agenda

- How do I submit an enhancement request?
- Questions submitted in the road show registration
- Open questions and answers



How Do I Submit an Enhancement Request?

- Contact ParishSOFT Accounting Support
- Call 866-930-4774 ext2
- Email support@parishsoft.com
- Requests are tracked



Question Included in Registration

- Adding accounts.
 - Accounts – Chart of Accounts (Add Sub-Accounts)
 - Use the filter to find the area where your account is in the full chart of accounts
 - Ctrl F can be helpful to search the shortcut
 - When adding a subaccount, follow the shortcut pattern

Question Included in Registration

- How can you change the order of the bank accounts in the drop down for deposits and billing so the operating account is first?
 - The list is alphabetical so you could change the description
 - User options allows you to have a default

Question Included in Registration

- Is there a report that can be run to see when vendors were last used? I'd like to make vendors inactive if they haven't been used in 2 yrs.
 - Yes. New process added to bulk inactivate vendors with report of when they were last used.
 - This can help with program performance.

Question Included in Registration

- Being able to create a JE off-line - meaning creating it and holding or saving without posting. Currently creating offline JE's is very tedious. Have lost several long JE's because of loss of internet.....
 - This would be an enhancement
 - You can import Journal Entries
 - If recurring used memorized
 - Add the force balance line

Question Included in Registration

- I would like help with cleaning up saved bills/transactions.
 - Click on Memorized icon and then the type of transaction you would like to clean up and delete.
 - Final date can be helpful as well.
- I would like help with updating memorized transactions with current values.
 - If the amount changes check the box to memorize with a 0 value and update after the transaction is pushed into the general ledger.

Question Included in Registration

- I would like a more complete review on which vendors should be getting 1099's annually based on the W-9's submitted to us, they are all over the board when they check LLC they often don't enter the tax classification.

Question Included in Other Road Shows

- Is there a way to change the date range on the Financial reports to not start with the beginning of the fiscal year? For example, sometimes I want to look at one quarter, like April through June. (For the Statement of Activities.)
 - Statement of Activities - With Date Range
 - Statement of Activities - Columnar Date Selection
 - Statement of Activities - Detailed Quarterly

Question Included in Other Road Shows

- How do I formulate a simple end of year account to present to the parishioners.
 - Think about content
 - Memorized report group
 - Summary version of Statements
 - Ledger Report Writer

Question Included in Other Road Shows

- I would like some guidance on budgeting. The "this year" and "last year" are a bit confusing to me when working on the new year budget. It would be nice if there was a space to enter the year of budget so not so confusing. Can we do that?
 - Budget year mimics fiscal year

QUESTIONS?

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Thank you!

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