

9.0A Release

PDS Church Office 9 Release 12-13-18

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[Download Now](#)

We recommend upgrading to **PDS Church Office 9.0A**, which offers the following enhancements.

Quick Links

- [New Features](#)
- [Improved Features](#)
- [New and Improved Reports](#)

New Features

New eGiving Solution

✓ Our new eGiving solution, Abundant, features online, mobile, and text giving to grow your ministry. It integrates with PDS contributions, so you can upload funds for online giving, and link transaction and donor information.

abundant for Testing Church

Search: Name or Email

Welcome, Karen

- Giving Forms
- Gifts
- Batches
- Scheduled Gifts
- Accounts
- Funds**
- Settings

Funds

[+ ADD FUND](#)

Name ↑	Memos Enabled	Predefined Memos
Bishop's Relief	No	...
Flower Donation	No	...
Holy Days	No	...
Homeless Shelter	No	...
Offering	No	...
Pledge Payment	No	DEACTIVATED
Rice Bowl wow	No	...

Select Fund Activities

Use Activity	Fund	Activity
<input checked="" type="checkbox"/>	1	Offering
<input checked="" type="checkbox"/>	1	Holy Days
<input checked="" type="checkbox"/>	1	Flower Donation
<input checked="" type="checkbox"/>	1	Homeless Shelter
<input checked="" type="checkbox"/>	9	Rice Bowl
<input type="checkbox"/>	1	Easter Donation
<input type="checkbox"/>	1	Christmas Donation
<input type="checkbox"/>	1	Fall Dinner Dance \$25
<input type="checkbox"/>	2	Tuition Payment
<input type="checkbox"/>	2	Tuition Payment From Last Year
<input type="checkbox"/>	2	Next Year's Tuition Payment
<input type="checkbox"/>	2	Registration Payment
<input type="checkbox"/>	2	Registration Payment From Last Year
<input type="checkbox"/>	2	Next Year's Reg. Payment
<input type="checkbox"/>	2	Book Payment
<input type="checkbox"/>	2	Graduation Payment
<input type="checkbox"/>	2	Science Payment

Mark All Clear All Save Cancel

✓ After donors give online using Abundant, you can import those gifts into PDS, and they display on the individual's contribution record.

eGiving: Show File Format

Transfer Type: Abundant

(Includes Checking Accounts, Savings Accounts, and Credit Cards.)
 Abundant, our online and text giving solution, features a corresponding application and integrates with your PDS Office. You can upload funds for online giving, download transactions and donor information, and customize your donation page to look like your website.

Date Range: 11/01/2018 Thru 11/13/2018

Online Transactions:

Abundant: John Thompson
 180 Dunbarton Dr.
 Florence, SC 29501

In PDS: 103 - Thompson,John
 180 Dunbarton Drive
 Florence, SC 29501
 john@example.org

john@example.org
 Online Gift
 Status: Ready to Post.

Post	ID	Name	Fund	Activity	Date	Amount	Check	Comments and Notes
103		John Thompson	1	Holy Days	11/02/2018	\$25.00	Online	
103		John Thompson	1	Offering	11/02/2018	\$10.00	Online	
		Abraham, Annie, Ms.	1	Holy Days	11/02/2018	\$10.00	Online	Name not found

Family: Thompson, John
 ID/Env: 103

Totals for All Funds: Show Totals

Fund: 1 - 18 (1/2018-12/2018) Funds Used: 1

Hide Rates **Church Contributions** 1103924 Fund Name: Church Contributions

Activity	Terms	Rate	Total

Recurring Act:
 Terms:
 Billing Period: Thru
 Rate:
 Total:
 Associate with Member:
 Using eGiving (EFT) EFT Info

Keyword 1:
 Keyword 2: Fund Comment

Date	Activity	Amount	Check	Member	Comment	Batch
11/02/2018	Offering	\$10.00	Online			532
11/02/2018	Holy Days	\$25.00	Online			532

✓ View our help pages to learn more about [creating an Abundant account](#), [managing activities](#) that donors give toward, and [posting eGiving](#) from Abundant.

Track Event Attendance with Badges

✓ Now you can print badges that track event attendance. In the [Event Attendance process](#), you can:

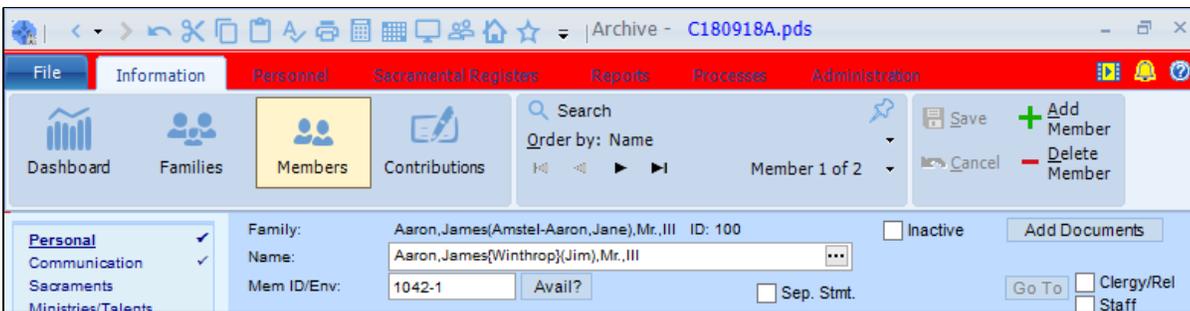
- Post attendance for an event or class
- See when people arrive and leave
- Ensure that only authorized parents or guardians pick up children at events.

Delete Records Based on Giving

✓ We created a process to [delete or inactivate families](#) who haven't given or pledged within a specified time period.

View Archived Information

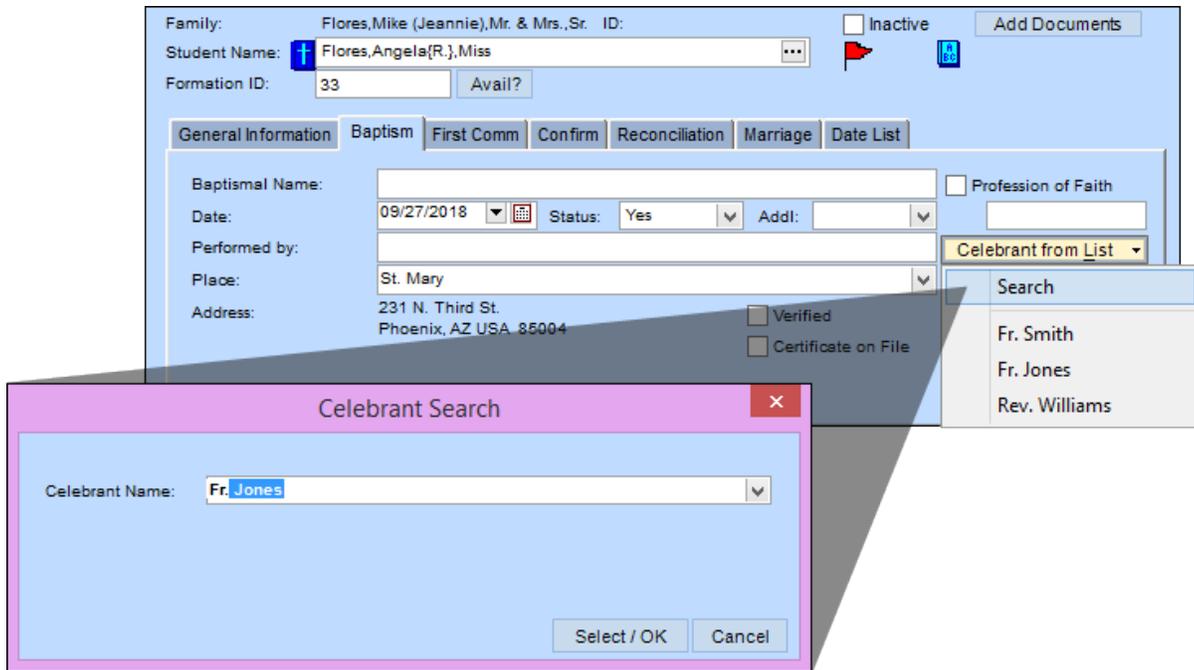
✓ Ever wanted to restore a backup without losing your current data? Now you can! When you load an existing backup, you can temporarily view data and run reports without affecting your latest information. The menu bar displays in red so you know you're viewing the archive.



✓ This also provides a way to pull an archived family back into your current data. For details and steps, see [View Information from Archived Files](#).

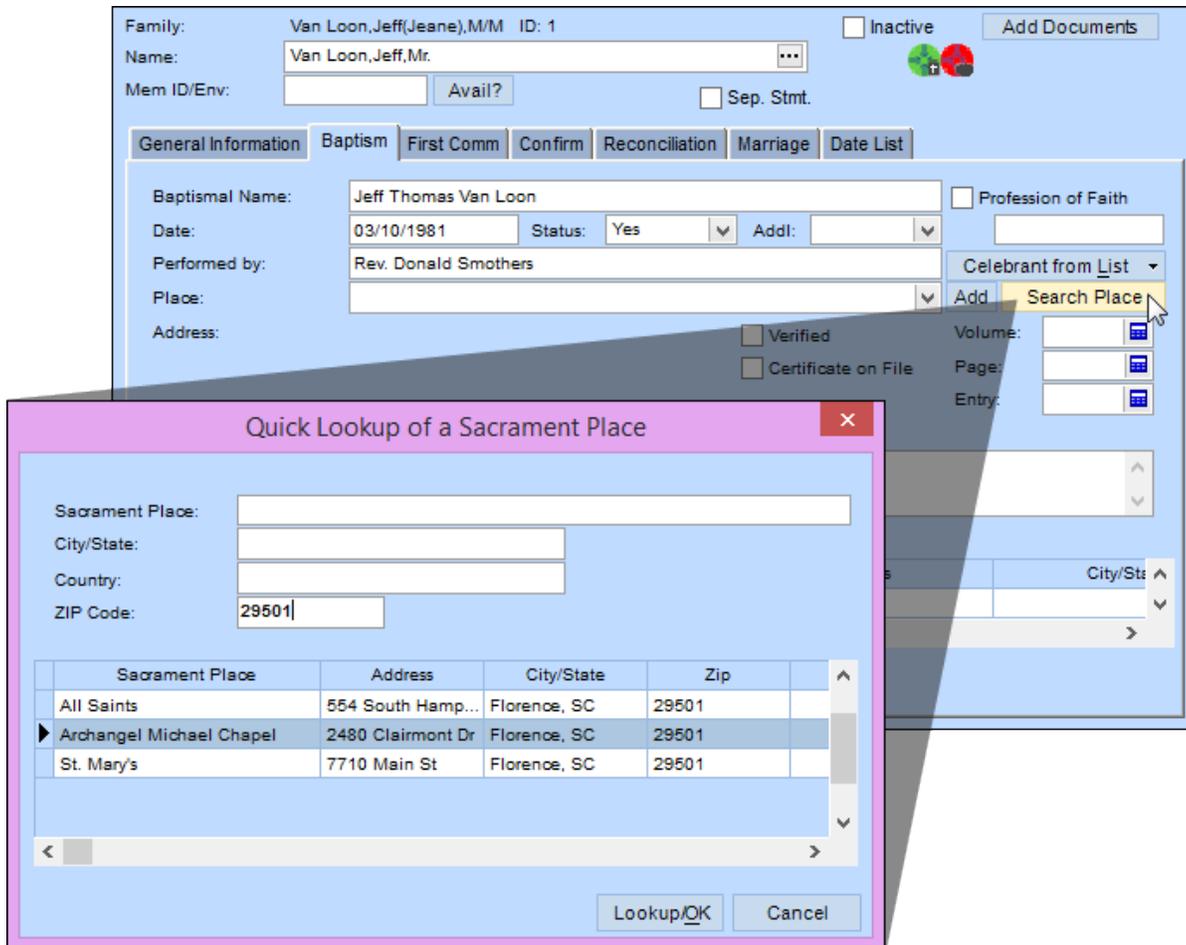
Search for Celebrants

✓ You can search your list to insert a celebrant for a sacrament. Click **Celebrant from List** then **Search** on a member's sacrament tab. Then, start typing the name or select one from the drop-down list.



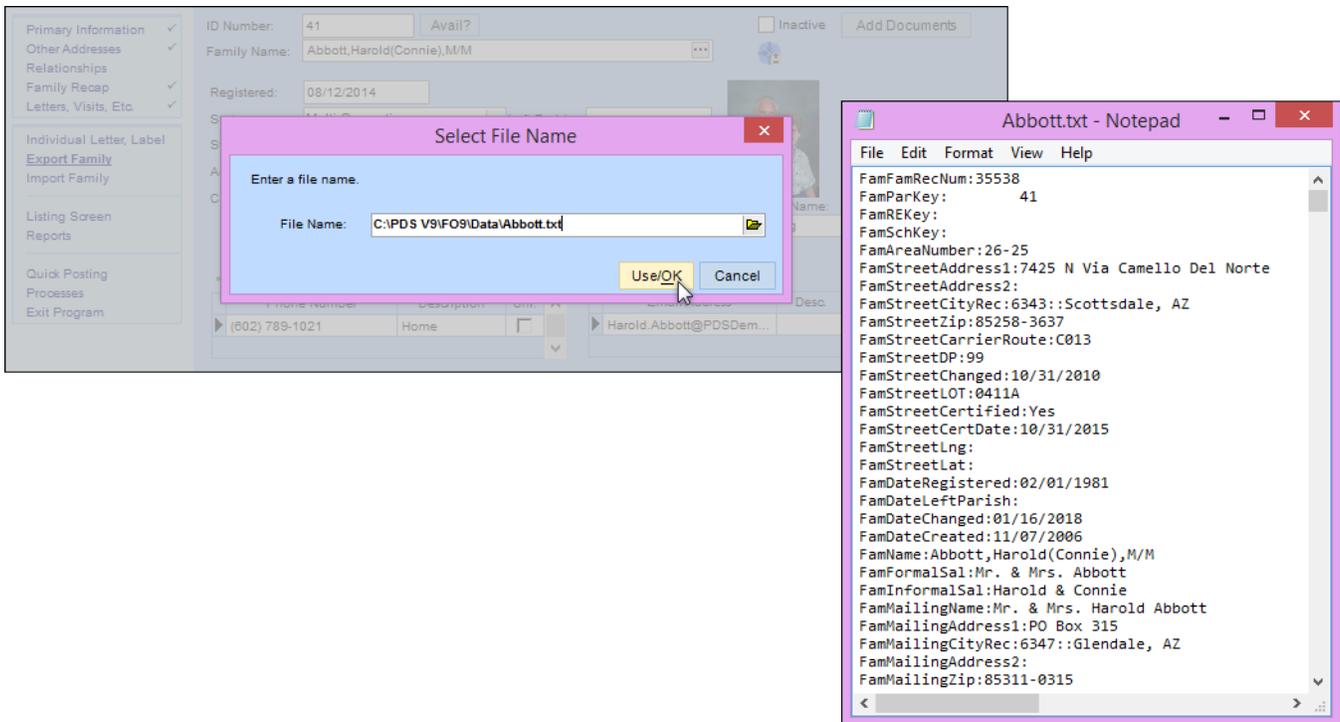
Search for Sacrament Places

✓ Know where a sacrament place is located, but can't remember exactly how it's named in the program? Now you can search for a place by name, city/state, country, and/or ZIP code. Click **Search Place** on a member's sacrament tab, and enter what you know to view matching places.



Export and Import Family Information

- ✓ We added a way to pull families from one data set into another.
- ✓ Export a family to send their family, member, and fund information to a text file. By default, the exported files are saved in your Data folder with the family's last name as the file name, but you can edit either of these to meet your needs.
- ✓ Import a family to create a new family using the information from a text file.



Personnel Quick Postings

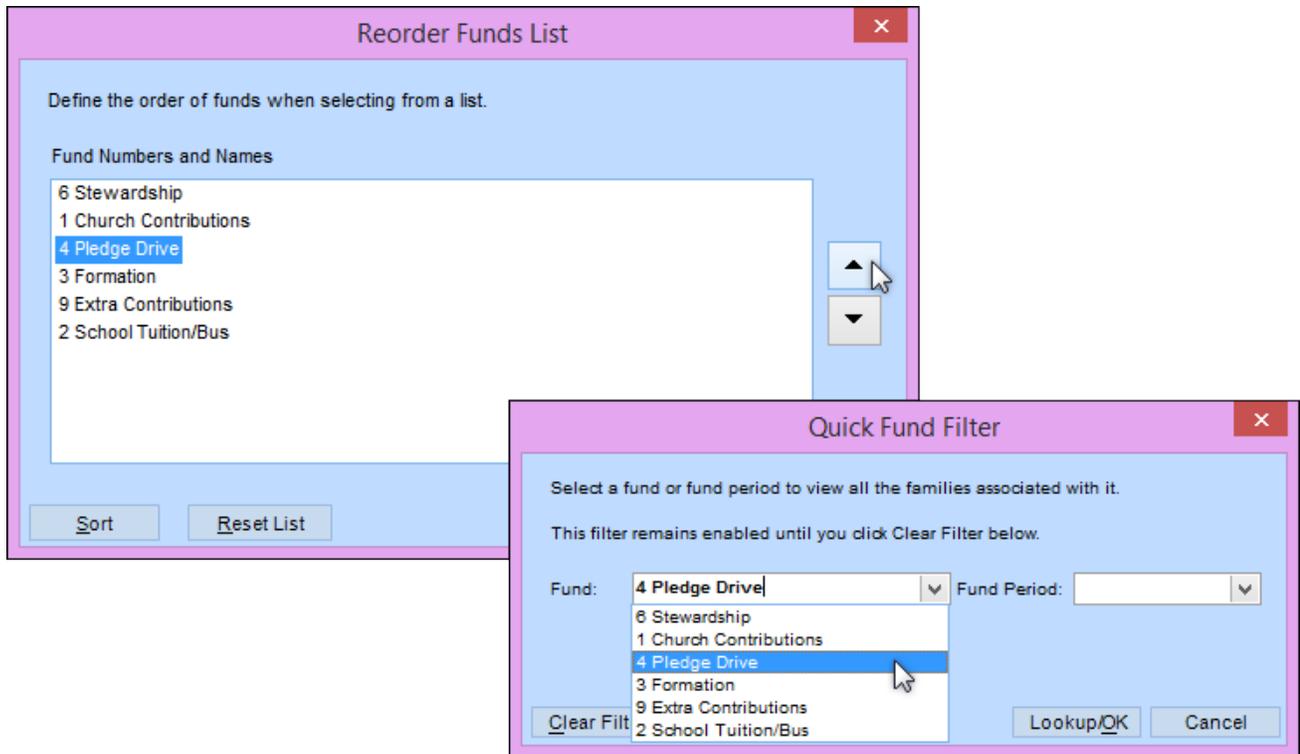
✓ We added several new personnel quick postings. You can post [keywords](#), [pictures](#), [background check information](#), and [other requirements](#).

Activate/Inactivate and Delete Multiple Personnel Records

✓ We created two new processes to [activate/inactivate personnel](#) and to [delete a group of personnel](#) at once.

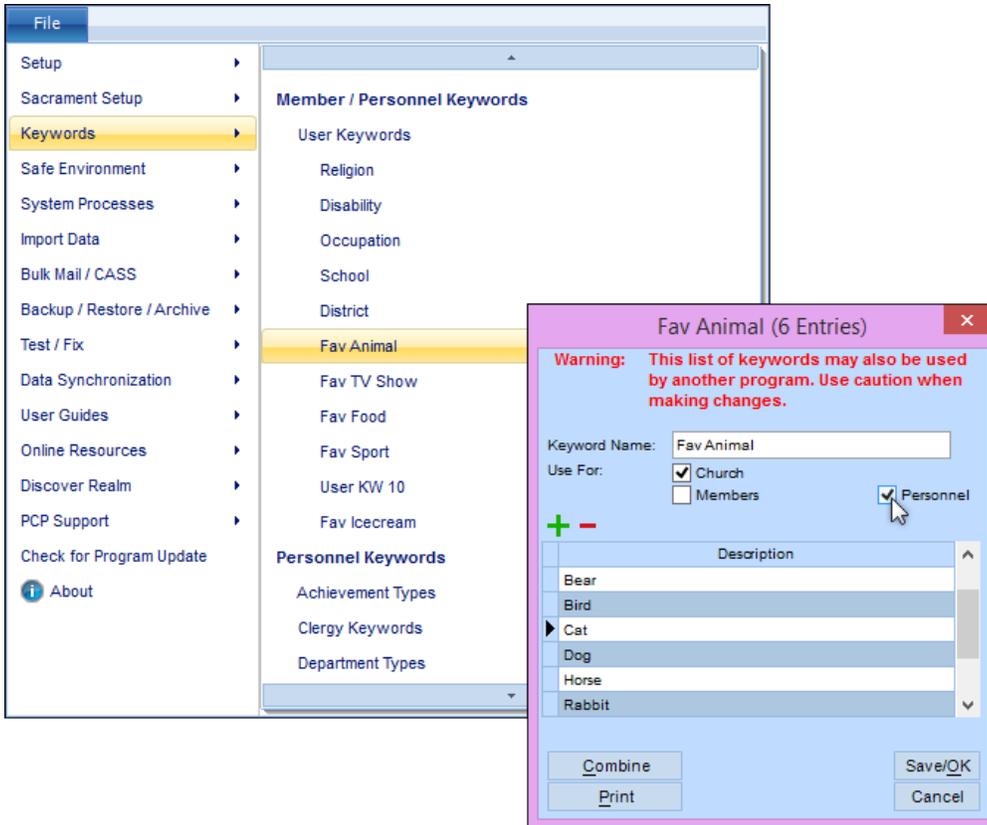
Reorder Funds List

✓ You can [reorder your funds](#) in the lists that display throughout the program. That way, you can see the funds you use most often at the top.

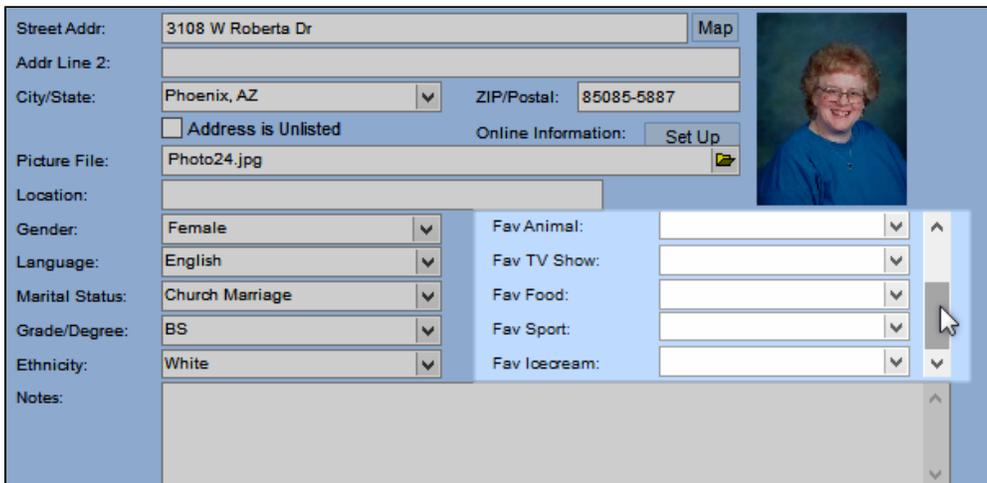


Personnel Keywords and Location

- ✓ User keywords are now available for personnel records.



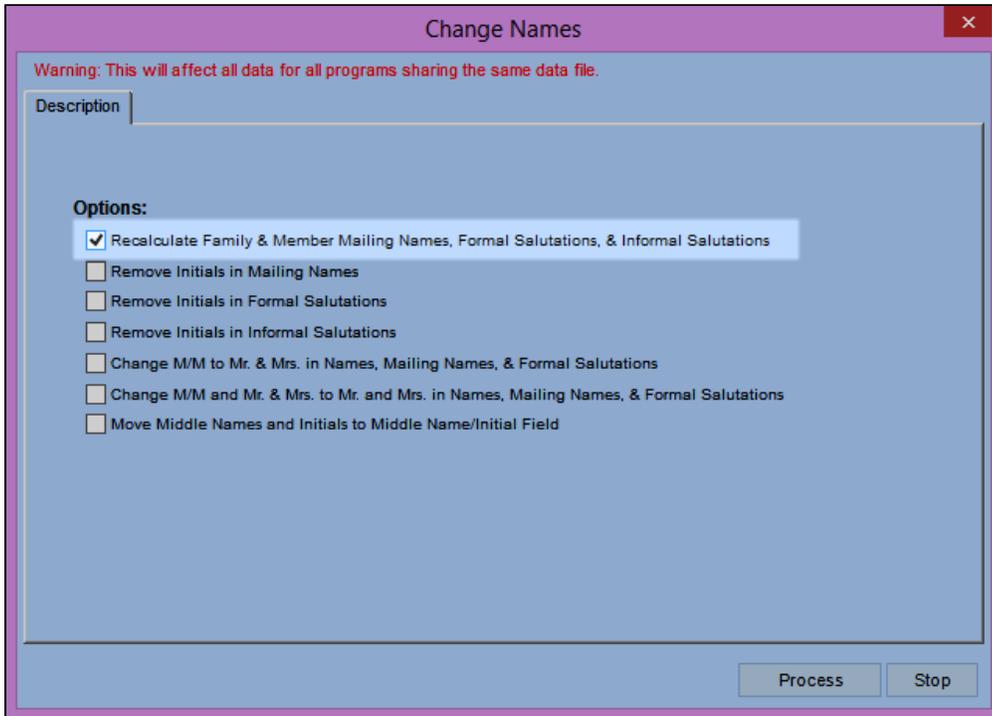
✓ These options show up on the personnel's Primary Information window.



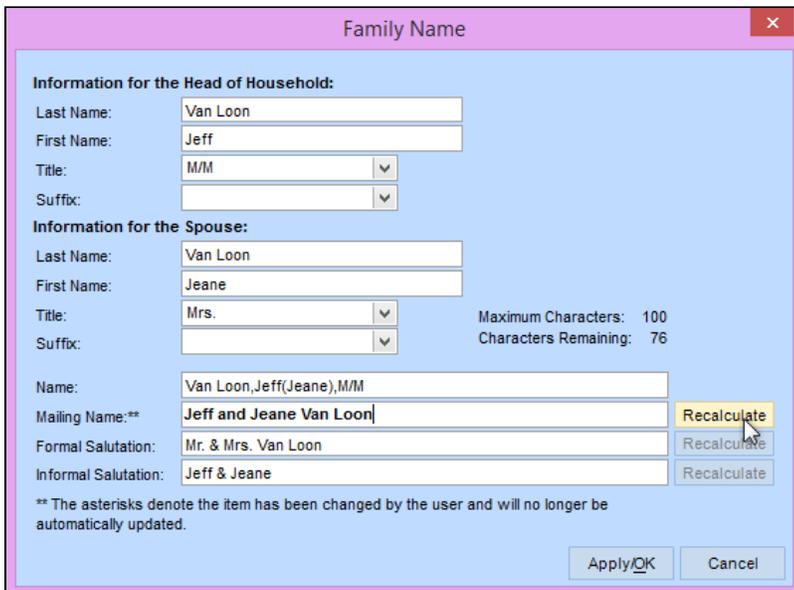
✓ In the same window, we added a Location field.

Recalculate Names and Salutations

✓ In the [Change Names process](#), we added a new option to recalculate mailing names and salutations.



✓ During this process, all existing mailing names, formal salutations, and informal salutations are removed and replaced with the default values based on the first and last names you originally entered. This is essentially the same as clicking **Recalculate** in the Family Name dialog box.



✓ This is especially helpful if you've converted your data and have blank mailing and salutation fields.

Fund Comments

✓ Add any comments about a family's fund in the [Rates/History/Keywds window](#).

Family: Van Loon,Jeff(Jeane),M/M
 ID/Env: 1

Totals for All Funds: Show Totals

Envelope User

Fund: 1 - 18 (1/2018-12/2018)

Funds Used: 6, 1, 4, 3, 9, 2
 Fund Name: Church Contributions

Hide Rates **Church Contributions**

Activity	Terms	Rate

Recurring Act:
 Terms:
 Billing Period: Thru
 Rate:
 Total:

Associate with Member:
 Using eGiving (EFT) EFT Info

Keyword 1: Keyword 2: *Fund Comment

Fund Comment

Unable to complete pledge due to death in the family.

OK Cancel

✓ Once you've entered a comment, an asterisk (*) displays on the button.

Family/Member Phone and Email Lists

✓ When you hover over the grids, the phone numbers and emails for all family members display. Once you click in the grid, a dialog box now displays a complete list of family and member phones or emails.

✓ Here, you can add, edit, and delete phones or emails. Select whether each item shows in the family window or only in an individual's Communication window. If you clear all check boxes for an item, it's deleted from all windows.

Family Name: Lee, Adam(Dolores), M/M

Registered: 03/01/1981 Envelope User Synchronize w/Dio

Status: Two Parent Family Left Parish:

Street Addr: 6924 E 3rd St Map

Addr Line 2:

City/State: Scottsdale, AZ ZIP/Postal: 85251-5501

Send No Mail Geog. Area: 4-20

All Addresses are Unlisted

Picture File Name: Photo42.jpg

Phone Number	Description	Unl.
(555) 728-2709	Home	<input type="checkbox"/>
(555) 939-2930	Office	<input type="checkbox"/>

Email Address	Desc.	Pref.	Unl.
LeeFamily@PDSDemo.com	Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dolores.Lee@PDSDemo.c...	Personal	<input checked="" type="checkbox"/>	<input type="checkbox"/>

General Confidential

Family Keyword

- Founding Family

✓ We also added a new process you can use to [add family phones/emails to member records](#).

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Improved Features

New Options When Adding Families

✓ When you click **Add Family**, you have options for which type of family to add. If you know the family was previously deleted from your program or currently exists in a program you share data with, add an archived family. Otherwise, add a new family.

Confirm

You can add a new family or an archived family. An archived family is one whose record has been removed from viewing in the program, but it still remains in your data. What type of family do you want to add?

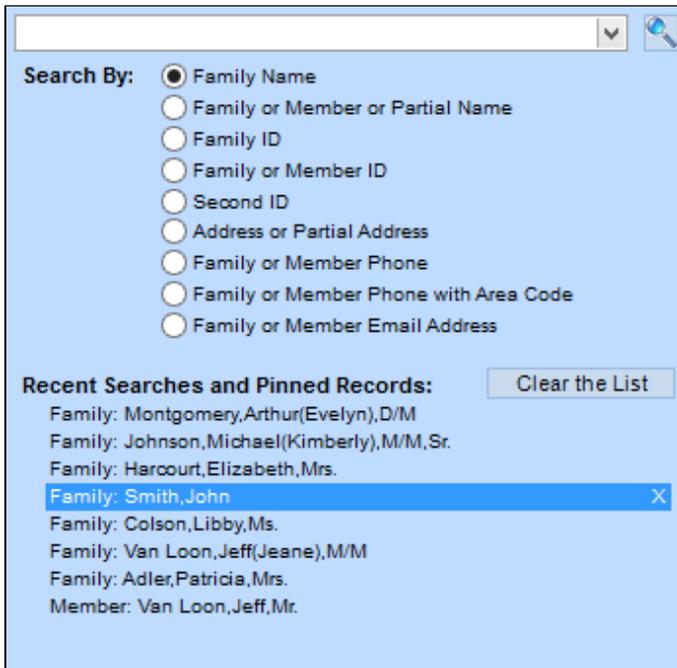
New family

Archived family

Add Cancel

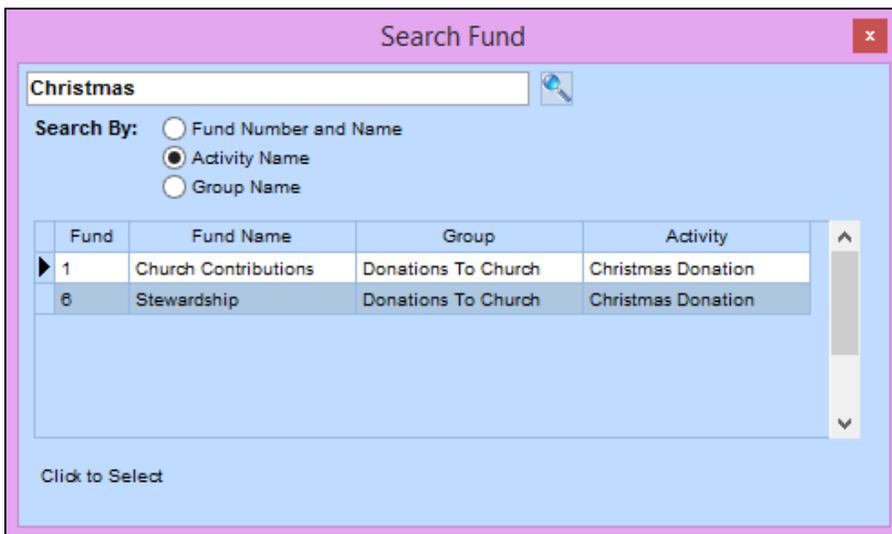
More Efficient Searches

✓ Control the size of your recent searches and pinned records list. Click **Clear the List** to remove all entries, or select a record and click X to remove it from the list.



Fund Search Options

✓ In addition to fund number/name, you can now search by activity name or group name in the Fund Setup window. Click a result to go to the fund.



SpeedCheck Batch Information

✓ Now you can see the number of checks and the total amount when importing batches in SpeedCheck.

List of Checks in the Batch:									
Linked	Check Date	Routing Num	Account Num	Fund	Year	Activity	Amount	Check Num	Number
No	06/26/2018	10288078	884000128	10			\$80.00	02984	
No	06/26/2018	10288078	884000128	1	16	Offering	\$75.00	1387	
No	06/26/2018	10288078	884000128	1	16	Holy Days	\$75.00	1387	
No	06/26/2018	10288078	884000128	1	16	Holy Days	\$40.00	9012	
No	06/26/2018	87800008	884000128	10			\$15.00	00817	
No	06/26/2018	87800008	884000128	1	16	Offering	\$15.00	00817	
No	06/26/2018	10288078	884000128	1	16	Offering	\$25.00	009999	

Number of Checks: 7 Total Amount: \$305.00

Automatic Batch Date

✓ Now, when you enter rate information in the Rates/History/Keywds window, the batch date is updated with today's date. You can print it on reports using **Fund Rate Batch Date** or **Fund Rate Pledge Date**.

Family:	Van Loon, Jeff(Jeane),M/M		
ID/Env:	1		
Query Fund:	Fund 6-18	Envelope User	
Fund:	6	- 18	(1/2018-12/2018)
<input type="button" value="Hide Rates"/>	Stewardship		
+ - ↕			
Start Date	End Date	Batch	Batch Date
01/01/2018	12/31/2018		08/31/2018

Improved Member Reassignment

✓ When you reassign a member to an existing family and they're the last person on the record, you now have options to copy contact information from the old record.

Reassign Member

This process will reassign the member displayed below into a new family.

Member to Reassign: **Wylie,Barbara[Clayton],Mrs.**

Create a New Family Record

 ID/Envelope: Avail?

 Family Name: ...

Copy addresses, phones, and emails from the old family.

Add Member to an Existing Family

 ID/Envelope: 135 ▾

 Family Name: Campbell,Leonard,Mr.,IV ▾

Fund and Family Information:

This is the last remaining member in this family.

Reassign all fund payments to the new family.

Delete the old family record.

Copy phone numbers from the old family

Copy email addresses from the old family

Print Setup for All Funds

✓ We updated the print function in the [Fund Setup window](#) so you can print for all funds.

Confirm ✕

Select a fund to print:

This fund only

All funds

Ministries and Talents on Online Forms

✓ When creating an [online registration form](#), you can now choose which ministry and talent statuses display.

Ministries:		Talents:	
Selected	Ministry	Selected	Talent
<input checked="" type="checkbox"/>	Altar Server	<input type="checkbox"/>	Athletics
<input type="checkbox"/>	Baby Sitter	<input checked="" type="checkbox"/>	Baby Sitting
<input type="checkbox"/>	Baptism Team	<input checked="" type="checkbox"/>	Baking
<input checked="" type="checkbox"/>	Children's Choir	<input checked="" type="checkbox"/>	Car Pool
<input checked="" type="checkbox"/>	Choir	<input type="checkbox"/>	Carpentry
<input checked="" type="checkbox"/>	Choir-Spanish	<input checked="" type="checkbox"/>	Chaperone

Total Entries: 15

Total Entries: 12

Ministry & Talent Status:	
Selected	Status
<input checked="" type="checkbox"/>	Actively Involved
<input type="checkbox"/>	Chairperson
<input checked="" type="checkbox"/>	Interested
<input type="checkbox"/>	Needs/Pending
<input type="checkbox"/>	Needs/Responded To

Total Entries: 2

Updated Canadian Receipt URL

✓ To comply with the [Canadian Revenue Agency's changes](#), the agency's name and website address now display at the bottom of the Canadian tax receipts.

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New and Improved Reports

Export to Excel

✓ You can now create export reports that open in Microsoft Excel.

Export Properties:	
Export File:	
File Format:	<div style="border: 1px solid gray; padding: 2px;"> Microsoft Excel (.xls) <div style="float: right; border: 1px solid gray; padding: 2px;"> <input checked="" type="checkbox"/> Inc. Header </div> </div>
Filename:	<div style="border: 1px solid gray; padding: 2px;"> Comma Separated Values (.csv) <div style="float: right; border: 1px solid gray; padding: 2px;"> <input type="button" value="Go"/> </div> Extensible Markup Language (.xml) Line/Form Delimited (.txt) Tab Delimited (.txt) Fixed Width (.txt) Microsoft Excel (.xls) OpenOffice Calc (.ods) </div>
Fields to Export:	

Export to QuickBooks

✓ When you export your batch totals to QuickBooks using a csv file, the process now works better with QuickBooks Online. It no longer exports the Bank Account line, and the payment totals display in the file as positive amounts instead of negative amounts.

Print the Family Head Title

✓ We added **Head Title** to the list of fields to print in Family and Member reports. You can also use it in Additional Selections and on the Family Listing Screen.

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