



Carla Haiar <chaiar@sfcatholic.org>

CFSA 2017, Title field, WebSite

1 message

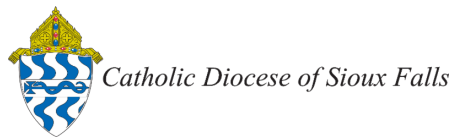
Catholic Diocese of Sioux Falls <chaiar@sfcatholic.org>

Tue, Feb 21, 2017 at 10:25 AM

Reply-To: chaiar@sfcatholic.org

To: chaiar@sfcatholic.org

ParishSOFT CN Family Suite users, a few tips and important information regarding CFSA 2016.



CFSA 2017 CN Family Suite processing

CFSA letters were sent over the weekend and many should have received the letter. Based on RETURNS (many are snow birds) I will be updating the Family Group to Post Office Returned. You should see these in Notifications. Please review the record, correct the address and update the Family Group to Active once corrected.

Please follow the [CFSA processing instructions](#) linked here. We need to have pledge records created for EVERYONE in your database. Once a card is received, the Pledge Total and Down Payment amounts should be entered on the Edit Pledge screen.

CFSA Processing Videos

Links for processing CFSA can be found below. Processing for CFSA 2017 is the same as CFSA 2016. The videos below reference CFSA 2016, but applies to CFSA 2017.

[Create Batch](#) Please create all batches as Detailed Posting when posting your CFSA 2017 pledge records as you are adding these Pledge and Down Payment on the Edit Pledge screen.

[Post to a New CFSA Pledge](#) Pledge card and down payment (many times this is the full payment) is in hand. Add this to the existing Zero Pledge record previously created.

[Post to an Existing Pledge](#) This will come about later in the appeal when subsequent payments are received for CFSA 2017. This is a payment received for a Pledge Card already entered into the system.

Member Title Field

Gender:

Title:

First Name:

Nick Name:

Middle Name:

Last Name:

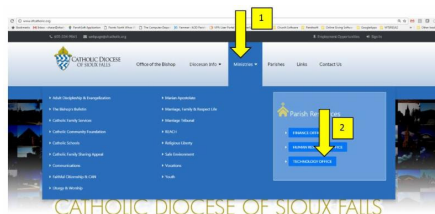
Suffix:

1

Title fields have been added with out periods for Mr, Mrs and Ms. Please use the title fields at the top of the Title field drop down list. This will format the Formal Mailing Name correctly when using Auto Fill on the Family Details screen.

ParishSOFT and CFSA Tips and Tricks on website

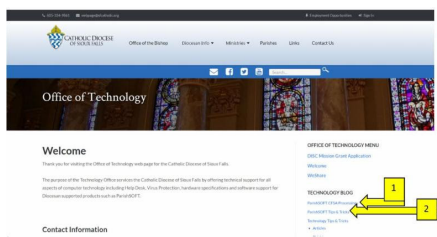
The [Catholic Diocese of Sioux Falls](#) updated website was launched last month. All content was transferred from the old site to the new site.



Technology Web Page

1. Click on Ministries
2. Click on Technology

Technology Web Page



Right Menu Bar

1. Parishsoft CFSA Processing
2. Parishsoft Tips and Tricks

Each heading is a link to a page with either a video or pdf handout for your reference. There are paging features at the bottom of the page.

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