



CN Family Suite Newsletter

Happy Advent! I did receive notification that ParishSOFT has an update available 4.3.5 for our CN Family suite. I will let you know of implementation dates.

Previous Tips and
Tricks can be found [HERE!](#)

End of Year Reports for 2015

The Catholic Diocese of Sioux Falls recommends that ALL Registered and Active families receive a Detailed statement of giving for the calendar year of 2015.

Offering, Reports, Contributions, Contribution Statements

1. Check box below Funds icon to select ALL funds.
 2. Click Select yellow highlighted link to select ALL funds, even those not displayed on this page.
 3. Click Next
-

Offering Reports

Select Report

Category	Report
Audit	Postings
Batches	Statements
Contributions	Summary
Pledges	

Family Detail Statements

Funds Selected 10 of 156	Statement Date 12/11/2015
Givers Selected ---	Contribution Dates 1/1/14 - 12/31/15
Registration Status Registered	Total Given \$5.00 - \$1000000.00

Filters Template Givers

All 10 records on this page are selected. [Select all 156 records](#)

Description	Fund #
<input checked="" type="checkbox"/> 2006	
<input checked="" type="checkbox"/> 2007	
<input checked="" type="checkbox"/> 2008	
<input checked="" type="checkbox"/> 2009	
<input checked="" type="checkbox"/> 2010	
<input checked="" type="checkbox"/> 2011	
<input checked="" type="checkbox"/> 2012	
<input checked="" type="checkbox"/> 2013	
<input checked="" type="checkbox"/> 2014	
<input checked="" type="checkbox"/> 2015	

Page 1 of 16 (156 Records) 1 2 3 4 5 ... 15 16 >

* All funds listed are tax-deductible

Next

1. Verify that you successfully selected ALL Funds from the previous page.
2. Enter your date range of contributions, 1/1/2015 through 12/31/2015
3. Details statements are the only statement accepted by the IRS. Please select Detail.
4. Most posting is done at by Family. If you do Member level postings, you will need to run these separately.
5. Generate your statements for ALL Registered and Active families as shown in the Filters.
6. Givers, select Show Filtered Givers.
7. Enter a minimum amount and maximum amount you wish to print. You can leave blank and ALL amounts will be printed.
8. Click Next.

Offering Reports

Select Report

Category	Report
Audit	Postings
Batches	Statements
Contributions	Summary
Pledges	

Family Detail Statements

Funds Selected 156 of 156	Statement Date 12/11/2015
Givers Selected ---	Contribution Dates 1/1/15 - 12/31/15
Registration Status Registered	Total Given \$5.00 - \$1000000.00

Fund Filters Template Givers

Contribution Dates
1/1/2015 to 12/31/2015

Type of Report
☐ Summary
☒ Detail

Givers
☒ Show filtered givers
☐ Show all
☐ Show all except filtered givers
☐ Show non-givers

Total Given
 Minimum: \$ 5.00
 Maximum: \$ 1000000.00
☐ Include \$0 Contributions
☐ Include Member Contributions

Report Content
☒ Family
☐ Member

Membership Filters
 Family Registration: Registered
 Family Group: Active
 Family Workgroups: All Groups
 Member Workgroups: All Groups

Previous Next

1. Enter the date you wish to have printed on your statements.
2. Body of Statement, Select either a previous Template or New Template
3. Once a statement is selected or added, you can edit the content in the edit box and click the save icon.

Statements Dates

Statement Date 12/11/2015

Body of Statement

Include a customized message in your statements. You may create a new message template by choosing (New Template) or edit an existing template. Template is limited to 1500 characters.

eoyletter

eoyletter

Arial (Font Size) B I U

A Signature from your pastor can be uploaded to your EOY letter.

1. Select New Signature.

- Have your Pastor sign a sheet of paper multiple times and scan it into your computer as a JPG file.

- Double click on the JPG file to open in a picture Editor.

- Using the Snippet tool (Start, All Programs, Accessories, Snippet Tool). Capture the best image and save as Pastor.jpg

2. Browse to the saved pastor location and you will see the signature in your preview box.

3. Give the image a name.

4. Verify it is legible in the Preview box.

5. Click Next.

Signature

The signature associated with your points.

(New Signature...)

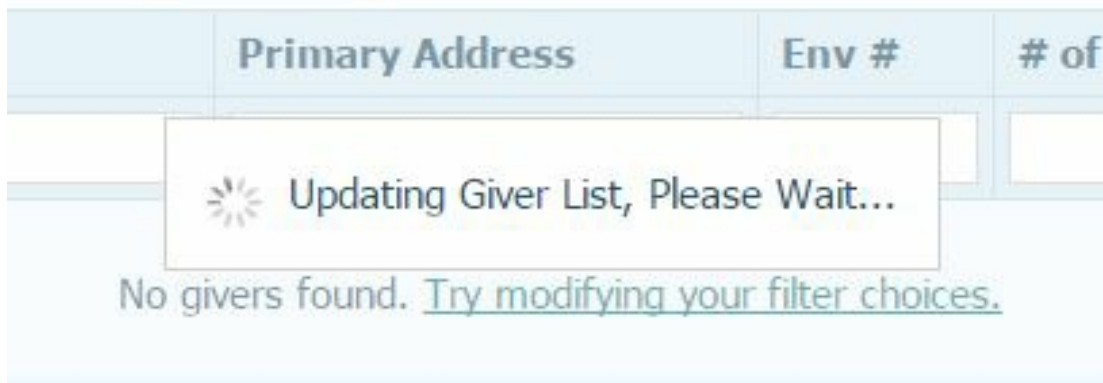
Urban

Browse...

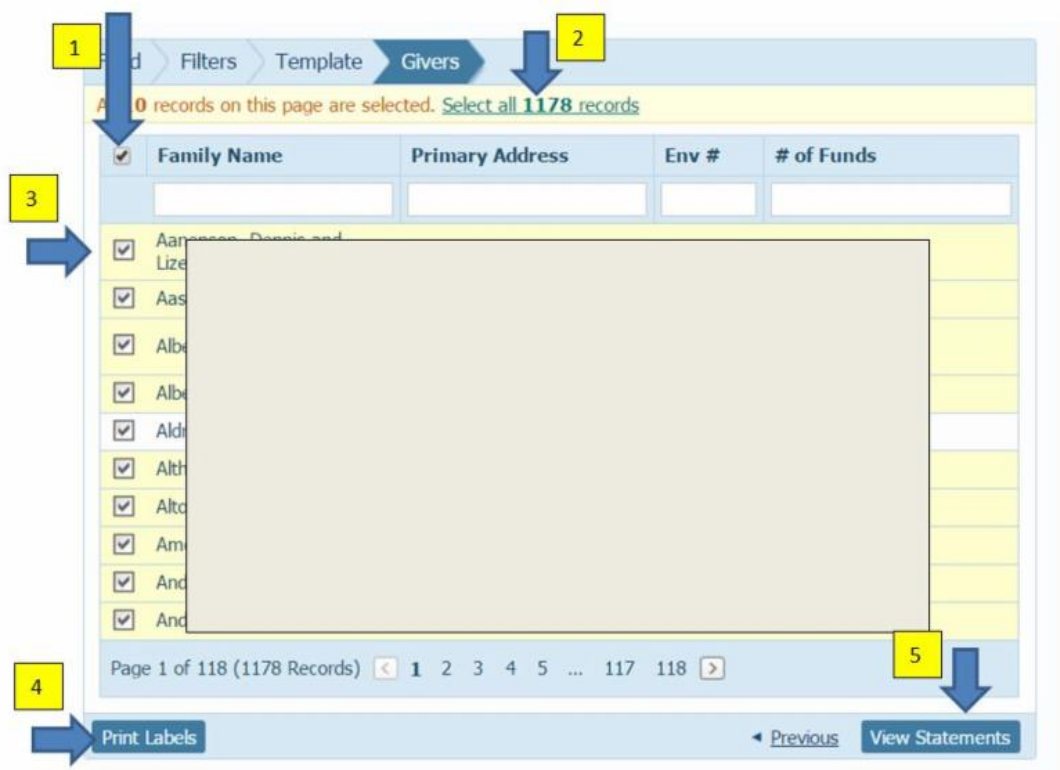
Rev. Anthony Urban

Previous Next

The system will process your EOY statements and return a list of all persons in your parish who satisfy your criteria. You may see the Generating Statements message. Please be patient.



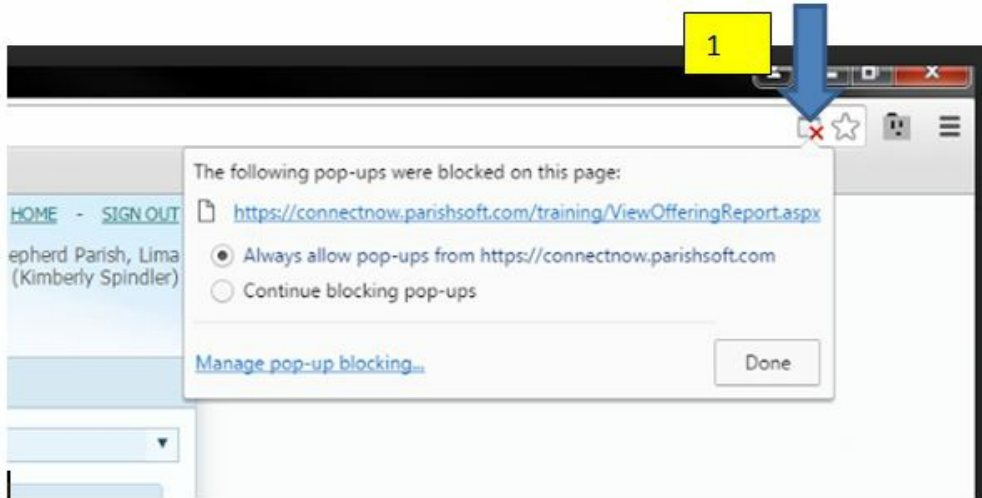
1. Check the box next to Family Name to select ALL statements for your parish.
2. Click on the green link that popped up to select ALL families, not just the first 10 displayed on this page.
3. Notice the checked boxes next to each name.
4. You may print labels for this group of givers by clicking on Print Labels. However, statements are formatted to fit in a number 10 window envelope. You are NOT able to CUSTOMIZE the EOY statement.
5. Click View Statements to preview your statement.



1. Click the Save icon to keep an electronic copy of these statements on your computer. It is a good back up and reference in case you need to reprint a single statement.
2. Click Print icon to send the statements to your printer.



1. If you do not see the statements, you may need to enable pop-ups for the CN Family Suite. Check for the red x in the upper right hand corner of your browser and be sure to click the button to "Always allow pop-ups from ..."



ParishSOFT CN Family Suite Training

ParishSOFT offers video training for the CN Family Suite at the site below. Review the first column titled: ConnectNOW Family Suite for topics to review.

<http://www.parishsoft.com/training/video.htm>

Thank you for taking time to read this newsletter. Please
email or call with ANY Questions!

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chaiar@sfcatholic.org | [Technology Website](#)

STAY CONNECTED:

