

CFSA 2015

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Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This newsletter will be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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Catholic Diocese of S

ConnectNow
POWERED BY PARISHSOFT

Family Suite

Videos Now Available

Videos are on the www.sfcatholic.org web site. Click on Ministries, Technology, ParishSOFT CFSA Processing. or click on the link below:

<http://www.sfcatholic.org/Technology/Content.aspx?id=1020&office=OfficeofTechnology>

Pledge Processing for CFSA

Follow the steps below to manage and process your CFSA pledges. These instructions were modified from the 2014 CFSA processing. I apologize if I missed changing a 2014 to a 2015. :-) Thanks for your patience!

CFSA 2015 card will have the option for parishioners to give one-time or on a scheduled payment plan. Please create zero pledge records at the beginning of the CFSA campaign so that you may determine who has yet to pledge to this campaign in future mailings.

ConnectNow POWERED BY PARISHSOFT **Family Suite**

1. 

Home | Family Directory | Religious Ed. | Offering | Ministry Scheduler | Adm

Fund Management | Batch Management | Pledge Management | Contribution

Fund Management

10 records    **Add Fund**  2.

	Fund #	Description	Tax Deductible	T
 	500-10-2013	Building Fund Campaign	<input checked="" type="checkbox"/>	
 	100-50	Holy Days - Special Collections	<input checked="" type="checkbox"/>	
 	100-10	Offertory	<input checked="" type="checkbox"/>	
 	100-10-2012	Offertory 2012	<input checked="" type="checkbox"/>	
 	100-10-2013	Offertory 2013	<input checked="" type="checkbox"/>	


Page 1 of 1 (5 Records)  **1** 


- Under Offering,
 1. Click Fund Management
 2. Click Add Fund

Add Fund

Fund #: CFSA-**2015**

Description: CFSA-**2015**

Start Date: 

End Date: 

Diocesan #: 9001-**2015**

External #:

Tax Deductible:

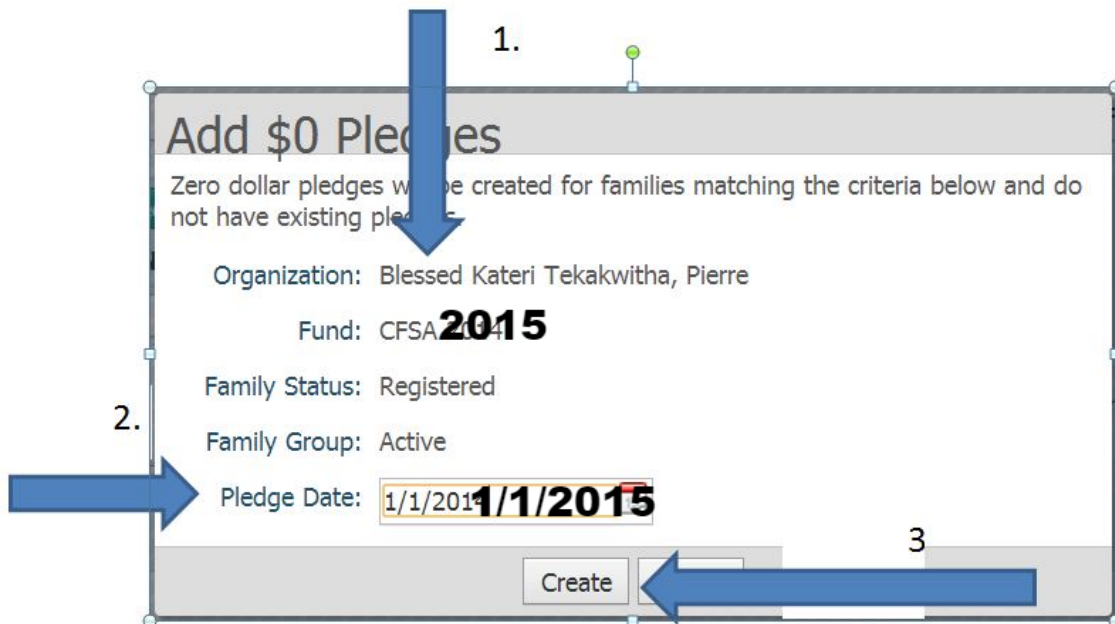
Require Pledge:

Tuition Fund:

Enter the information for the year 2015. This image is from 2014, just replace all 2014 with 2015.
Click Add Fund button

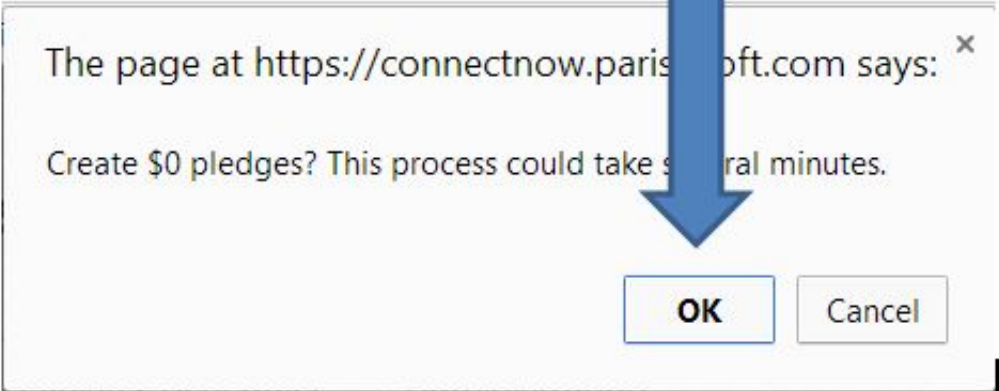


1. Pledge Management.
2. Select Fund CFSA 2014.
3. Family Status = Registered, Family Group = Active, Click View Pledges.
4. Add \$0 Pledges



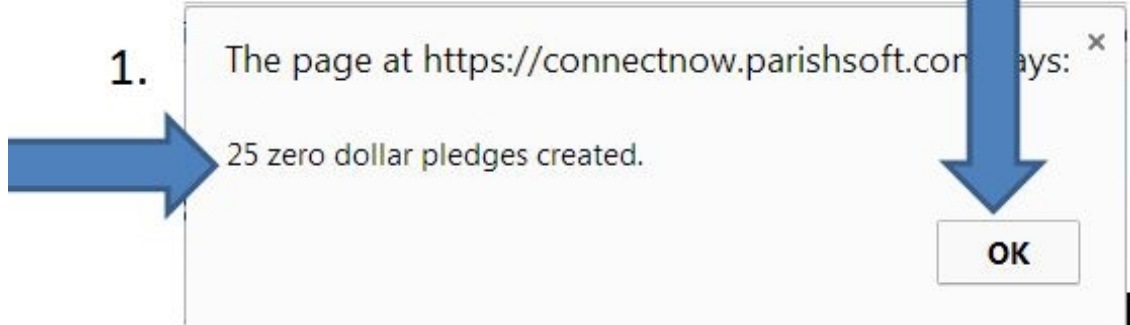
1. Verify your Organization.
Fund = CFSA 2015
Family Status = Registered
Family Group = Active
2. Pledge Date = 1/1/2015
3. Click Create

1.



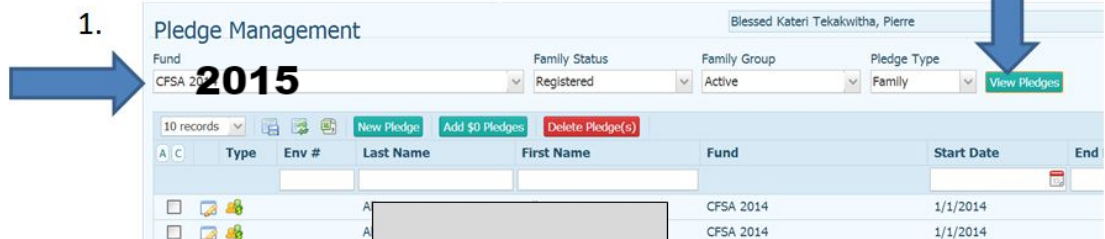
Depending on the size of your parish, you may wish to begin this process before you head out to lunch or break.
 1. Click OK to add \$0 Pledge records..

2.



1. Verify the number of pledges created, this should equal your Registered and Active count in your Family Directory.
 2. Click OK.

2.



<input type="checkbox"/>		B		CFSA 2014	1/1/2014
<input type="checkbox"/>	440	B		CFSA 2014	1/1/2014
<input type="checkbox"/>		B		CFSA 2014	1/1/2014
<input type="checkbox"/>		B		CFSA 2014	1/1/2014
<input type="checkbox"/>	14	D		CFSA 2014	1/1/2014
<input type="checkbox"/>		G		CFSA 2014	1/1/2014
<input type="checkbox"/>	915	H		CFSA 2014	1/1/2014
<input type="checkbox"/>	59	Jager		CFSA 2014	1/1/2014

Page 1 of 3 (25 Records) 1 2 3 >

1. Select the fund CFSA 2015 Registered, Active and Family are all displayed on your filters.
2. Click View Pledges.
3. Names of all persons currently Registered and Active will be displayed along with an 0 pledge record created. This number of records should match your count generated in the previous pop-up.

Upon receiving your Pledge Cards and payments, please count and total the Pledge Amount and Down Payments. For example:

16 Pledge cards were received for a total of \$14, 000

12 Pledge cards had a down payment included for a total of \$10,000

These numbers will be used in batch processing.

1. Offering

2. Batch Management

3. Add Batch

The screenshot shows a web application interface. At the top, there are navigation tabs: Home, Family Directory, Religious Ed., Offering, Ministry Scheduler, and Administration. Below these are icons for Batch Management, Pledge Management, Contribution Posting, Contribution List, Giving History, and Reports. The main area is titled 'Batch Management' and shows a table with columns: Status, Cash, Pledge, Count, and Fund. The table is currently empty with the message 'No Batches found.' Below the table are buttons for 'Add Batch', 'Delete Batch(s)', and 'Close Batch(s)'. A dropdown menu shows '10 records'. At the bottom left, it says 'Page 1 of 0'.

1. Batch Description

2. Fund

3. Date Opened

4. Cash Total

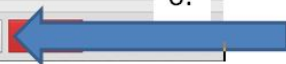
The screenshot shows a 'Create new batch' form. The 'Batch Description' field contains '20150201 CFSA'. The 'Fund' dropdown is set to 'CFSA 2015'. The 'Status' is 'Open'. The 'Date Opened' is '2/28/2014'. The 'Cash Total' is '\$10000.00'. The 'Pledge Total' is '\$14000.00'.

Cash Balance: \$0.00 Pledge Balance: \$0.00

Comment:

5.

6.

Add Batch 

1. Enter the Batch Name.
2. Select the Fund CFSA 2015.
3. Enter Date Opened.
4. Enter the Cash Amount (sum of Down Payments received).
5. Enter the Pledge Amount (sum of Total Pledge box on Pledge card).
6. Click Add Batch.

 1.

CFSA 2014 02 28 (77205) Quick Reports ▼

Batch has been created successfully.

Batch Description: 20150201 cfsa		Fund: CFSA 2015	Batch ID: 77205
Status: Open	Date Opened: Fri Feb 28 2014	Date Closed:	
Cash Total: \$10000.00	Pledge Total: \$14000.00	Transaction Count: 0	
Cash Balance: \$0.00	Pledge Balance: \$0.00	Batch Owner:	
Comment:			

Close Batch **Edit** Close

1. Verify that the batch was successfully created.
If everything looks correct, click Close, otherwise click Edit and correct.
- 2.. Click Close.


Batch Management Blessed Kateri Tekakwitha, Pierre

10 records ▼ **Add Batch** **Delete Batch(s)** **Close Batch(s)** Quick Reports ▼

A	C	Status	Batch	Cash	Pledge	Count	Fund
		Open					
<input type="checkbox"/>		Open	20150201 cfsa	\$10,000.00	\$14,000.00	0	CFSA 2015

Page 1 of 1 (1 Records) < 1 >


1. The Open batches will appear, take note of the Batch name.

1. 

Home Family Directory Religious Ed. **Offerings** Ministry Scheduler Administration


Fund Management Batch Management **Pledge Management** Contribution Posting Contribution List Giving History Reports

Blessed Kateri Tekakwitha, Pierre

Fund: CFSA **2015** Family Status: Registered Family Group: Active Pledge Type: Family **View Pledges** 

10 records ▼ **New Pledge** **Add \$0 Pledges** **Delete Pledge(s)**

A	C	Type	Env #	Last Name	First Name	Fund	Start Date	End Date
---	---	------	-------	-----------	------------	------	------------	----------

2. 

1. Enter today's date as the First Payment Date.
 2. End the Down Payment amount you received. This will reduce the Contributions dollar amount in your batch.
 3. Enter the Payment Type and Check # if available.
 4. Select the Batch from the Drop Down box.
 5. Enter the Total Pledge Amount.
 6. Enter the Frequency of payments expected.
 7. Enter the amount of the Payment to appear on the Pledge Statement.
 8. Select the months you wish to mail a statement.
 9. Add Reason -- New Pledge
- Click save

Let's see what happens in the batch.

1. Click on Batch Management.
2. Check the box next to the desired batch.
3. Click on the Quick Reports, select View Batch Details List Report.

Blessed Kateri Tekakwitha
2815 E Sully
Pierre, SD 57501

BatchDetail for CFSA 2014 02 28
Date Range : 2014-02-28 -

Pledges (1)

Start Date	End Date	Total Pledged	Balance	Contribution Type	Family	Fund
2014-02-28		\$2,000.00	\$1,500.00			CFSA 2014

Contributions (1)

Date	Amount	Contribution Type	Family	Fund	Comment
2013-12-16	\$500.00	Cash			Down Payment

Summary

	Pledges	Contributions	Transactions
Total	\$14,000.00	\$10,000.00	2
Posted	\$2,000.00	\$500.00	2
Balance	\$12,000.00	\$9,500.00	0

1. Batch name and date is listed.
2. Note the pledge information entered. Includes Start Date, Total Pledged, Balance, Contribution Type, Family and Fund.
3. Note the Contribution Posting amount from the Down Payment. This amount is batched.
4. Note the Pledge section where the Pledge Record created reduces the Batch Pledge Total.

5. Note the Contribution Posted section where this amount is reduced by the Down Payment.

2.

Edit Pledge (272865)

Pledge List Filters

Organization	Fund	Family Status	Family Group
Blessed Kateri Tekakwitha, Pierre	CFSA 2014	Registered	Active

Donor Record

First/Last Name	Env #	Pledge ID	Phone #	Address 1	Address 2	City/State/Postal
Th[redacted]er	440	272865	605[redacted]	[redacted]n Ave		Pierre SD 57501

Pledge Record

Pledge Date* First Payment Date*

Down Payment*	Payment Type*	Check #	Post to*	Batch
\$500.00	Cash	5124	Entire Family	CFSA 2014 02 28

Pledge Amount*	Adjustments	Adjusted Balance	Total Paid	Balance
\$2000.00	+\$0.00	=\$2000.00	-\$500.00	=\$1500.00

Frequency* # of Months* Payment Amount*

Pledge Notes (3000 characters left) Reason (200 characters left)*

Statement Months - [Select All](#) - [Clear All](#)

Select each month a statement should be sent

January
 April
 July
 October
 February
 May
 August
 November
 March
 June
 September
 December

1.

Save Close

1. You may EDIT and CHANGE a Pledge at ANY Time. However, with EACH edit you need to enter a reason for the change. This is required even when entering the pledge to a \$0 pledge record the first time.

2. You may at any time review the APPLIED payments to this pledge by clicking on the QuickReports, Pledg Details.

Blessed Kateri Tekakwitha
2815 E Sully
Pierre, SD 57501

Pledge for Th[redacted]er Envelope Number : 440

Pledged	Adjustments	Total Paid	Balance	Start Date	End Date	Batch	Fund
\$2,000.00	\$0.00	\$500.00	\$1,500.00	2014-02-28		CFSA 2014 02 28	CFSA 2014

Contributions (1)

Date	Amount	Check #	Contribution Type
2013-12-16	\$500.00	5124	Family

Summary

	Contributions	Transactions
Pledged	\$2,000.00	6
Posted	\$500.00	2
Balance	\$1,500.00	4

Sample of Pledge Detail report.

Blessed Kateri Tekakwitha
2815 E Sully
Pierre, SD 57501

Pledge for Thon [redacted] er

Envelope Number : 440

Pledged	Adjustments	Total Paid	Balance	Start Date	End Date	Batch	Fund
\$2,000.00	\$0.00	\$500.00	\$1,500.00	2014-02-28		CFSA 2014 02 28	CFSA 2014

Contributions (1)

Date	Amount	Check #	Contribution Type
2013-12-16	\$500.00	5124	Family

Summary

	Contributions	Transactions
Pledged	\$2,000.00	6
Posted	\$500.00	2
Balance	\$1,500.00	4

Sample of Pledge Detail report.

Please note the POSTING DATE! CN Family Suite posting of the Down payment on the Pledge Record will post with the current date. At this time, you are not able to change this date!

Continue to post the Pledge and Down Payments. You do NOT need to post the Down Payments on the Contribution Posting Screen, as long as you correctly select the batch from the Batch drop down box.

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