

# 2015 End of Year Statements

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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



Family Suite

## End of Year Statements

Follow the steps below to generate your end of year statements.

1. Offering.

2. Reports.

3. Contributions.

4. Contribution Statements.

1. **Fund** Filters Template Givers

All 10 records on this page are selected. [Select all 62 records](#)

Description	Fund #
<input checked="" type="checkbox"/> All Saints	4115-08
<input checked="" type="checkbox"/> All Souls	4115-12
<input checked="" type="checkbox"/> Ascension	4115-15
<input checked="" type="checkbox"/> Assumption	4115-16
<input checked="" type="checkbox"/> BANQUET	54
<input checked="" type="checkbox"/> Book Fees	4224
<input checked="" type="checkbox"/> Building Fund	9015
<input checked="" type="checkbox"/> Campaign for Human Development	9005
<input checked="" type="checkbox"/> Capital Campaign	9014
<input checked="" type="checkbox"/> Catholic Relief Services	9010

Page 1 of 7 (62 Records) < 1 2 3 4 5 6 7 >

\* All funds listed are tax-deductible

Next View Statements

1. Click the box under Fund.
2. Click on the highlighted pop-up that asks if you wish to Select all 62 records.
3. Only funds that are Tax-Deductible will appear in this list.
4. Click Next.

This will select ALL Funds in your system without you checking individual boxes.

1. **Fund** **Filters** Template Givers

**Contribution Dates**  
1/1/2014 to 12/31/2014

**Type of Report**  
 Summary  
 Detail

**Report Content**  
 Family  
 Member

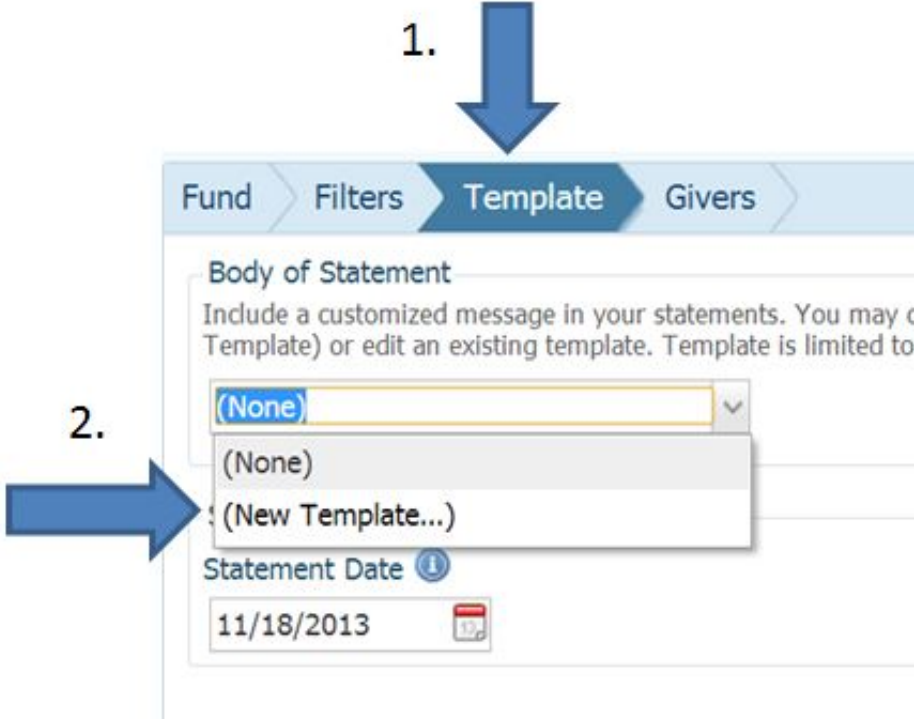
**Range of Contributions**  
 Minimum: \$-1000000.00  
 Maximum: \$1000000.00

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

Previous Next View Statements

1. Filters will now be highlighted.
2. Verify date range, should be 1/1/2014 through 12/31/2014.
3. Family Filters should be Registration Status of Registered, Family Group of All Groups, Family Work Gropus of All Groups. If a person gives to your parish, you want to send them a statement regardless of registration status and group values. You may wish to execute a different letter for UNREGISTERED, hence watch the Family Registration field to Unregistered.
4. Range of Contributions, set minimum to \$-10000000. Please enter a \$1000000 for a maximum amount. This is necessary to get ALL postings on your statement (even those that are negative amounts for incorrect posting).

5. Click Next.



1.

2.

Fund Filters **Template** Givers

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.

(None)

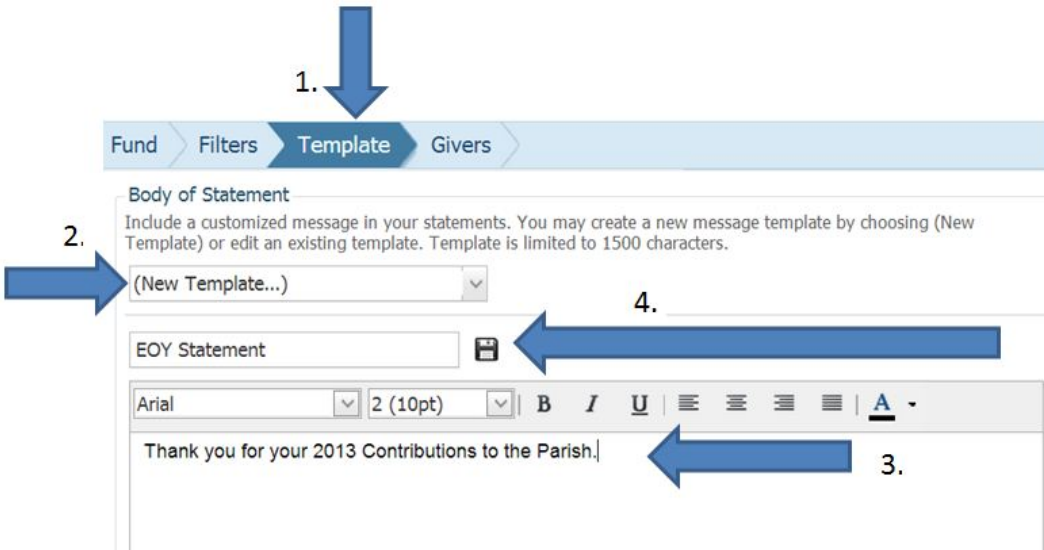
(New Template...)

Statement Date ⓘ

11/18/2013

1. Template will be highlighted.

2. Click (New Template ...).



1.

2.

3.

4.

Fund Filters **Template** Givers

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.

(New Template...)

EOY Statement

Arial 2 (10pt) B I U | ☰ ☷ ☹ ☺ | A -

Thank you for your 2013 Contributions to the Parish.

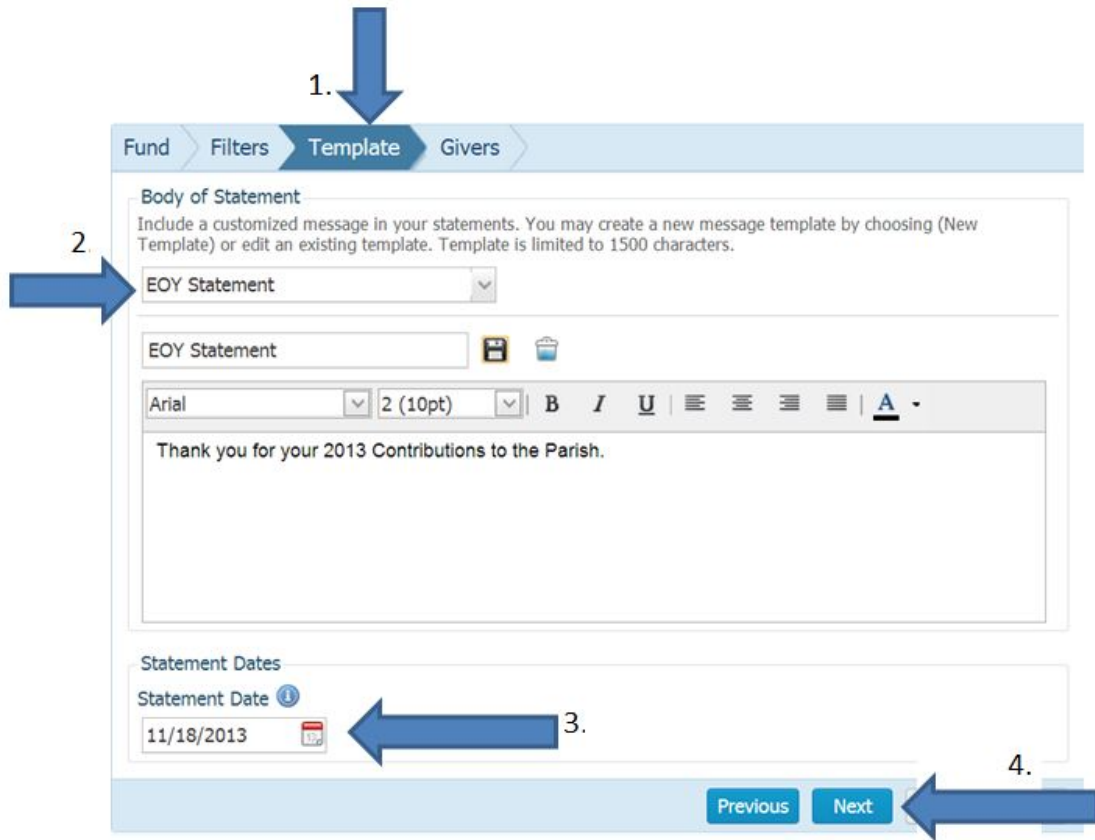
1. Template continues to be highlighted.

2. (New Template ...) from drop down should appear in drop down.

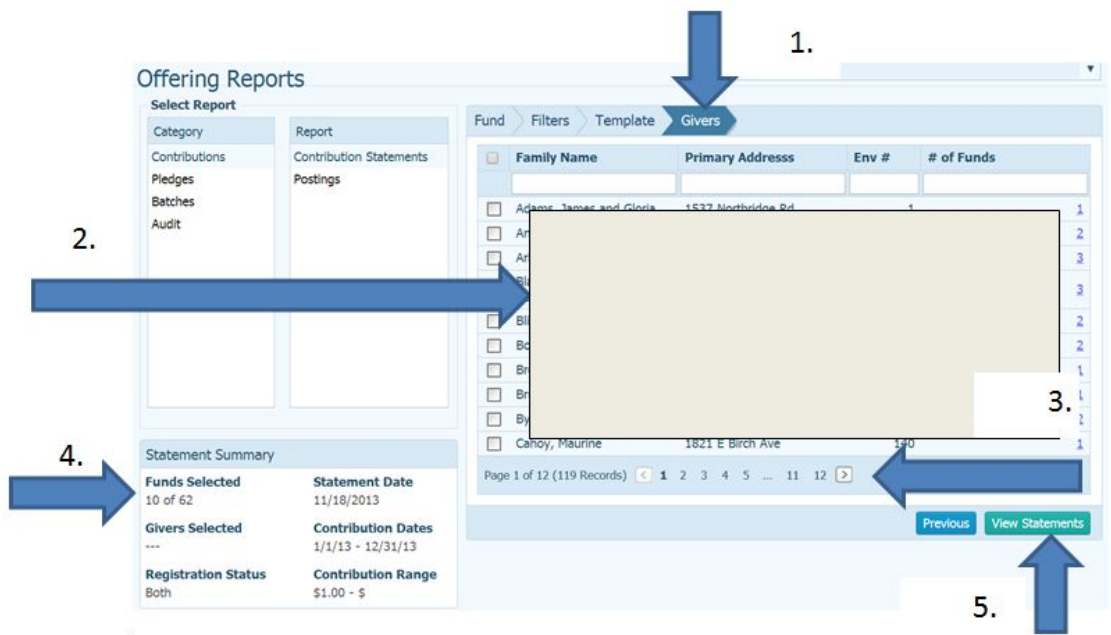
3. Enter a name "EOY Statement" into the naming field.

3. Enter text into your letter.

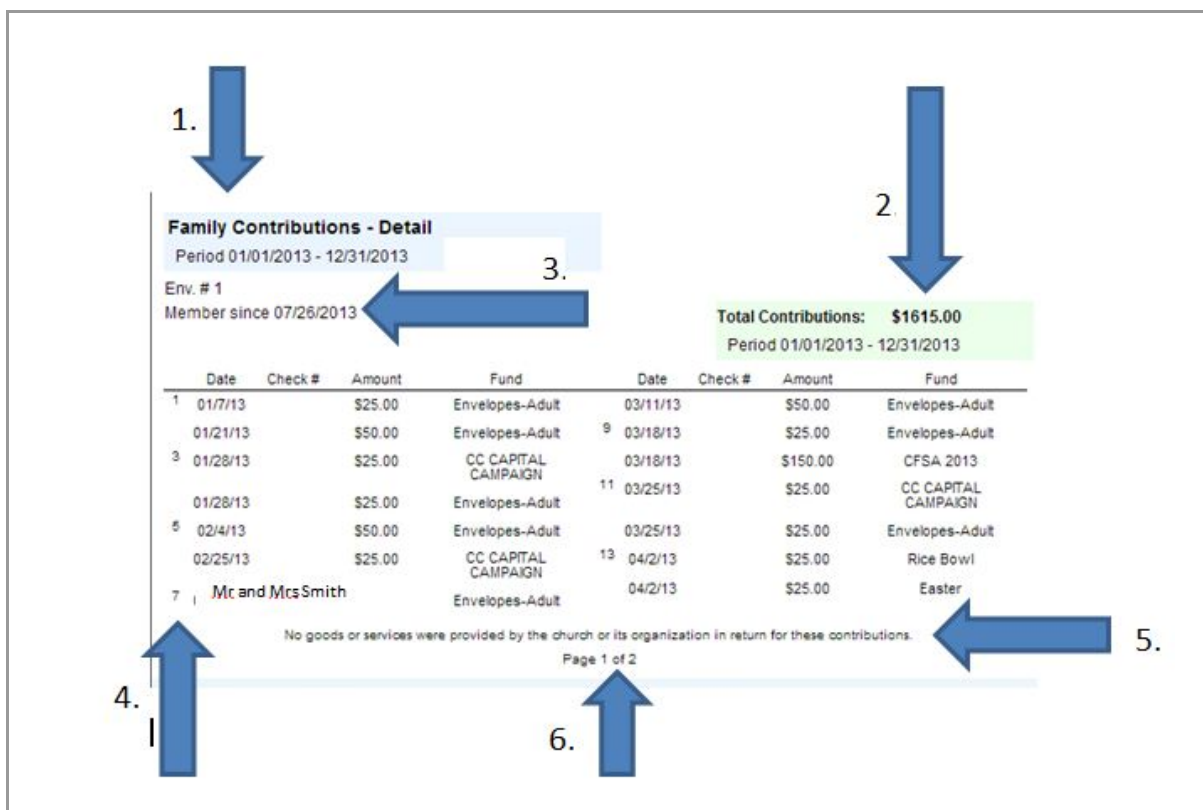
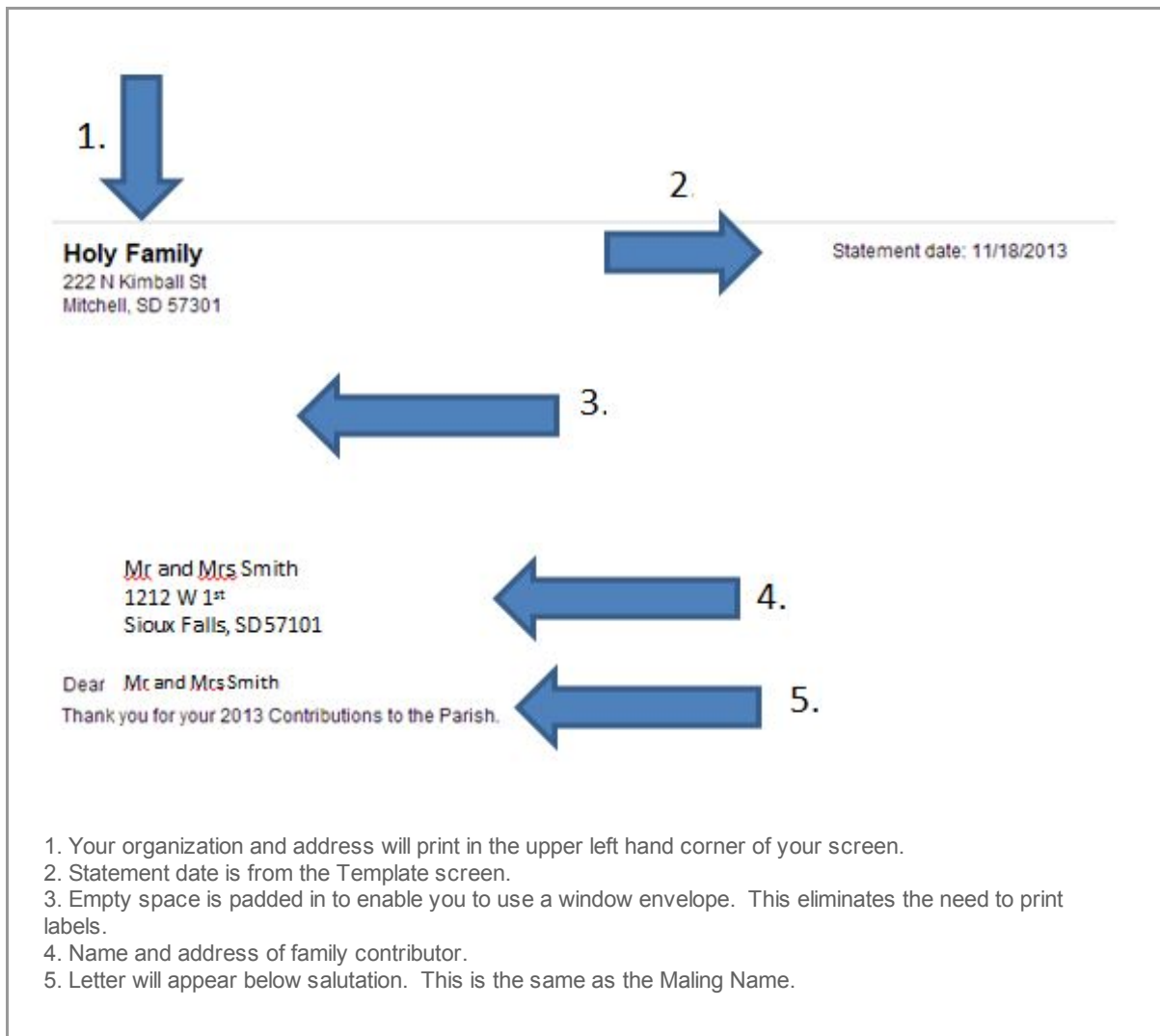
4. Click the Save icon.



1. Template continues to be highlighted.
2. Select EOY Statement from drop down.
3. Verify your Statement Date.
4. Click Next.

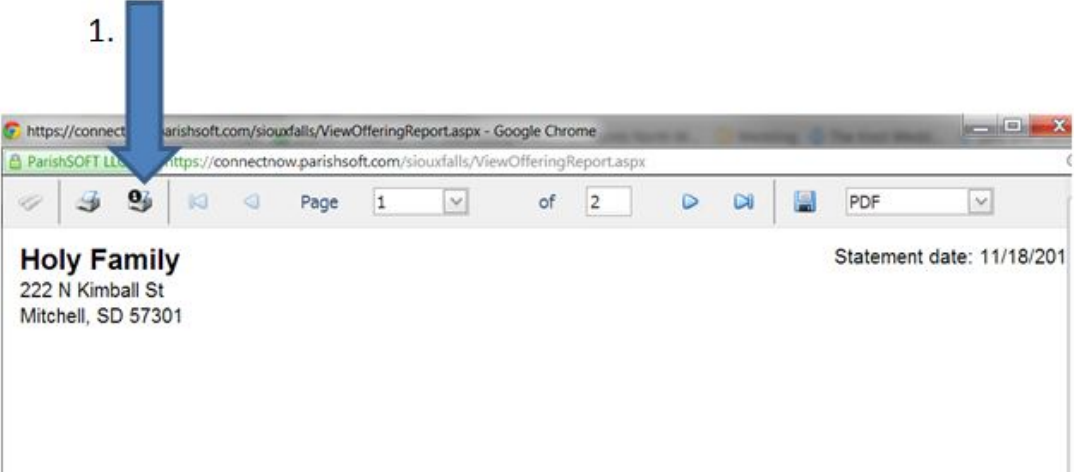


1. Givers will be highlighted.
2. Names will be listed.
3. You may page through or filter on last name.
4. Review your selection parameters.
5. Click on View Statements.



1. Family Detail Statement is only statement available in CIV Family Suite. It is also the preferred statement as the IRS does not accept summary statements as official tax documents.
2. Total Contributions are listed at the top of the form.
3. Member since date is displayed. Be aware this may be based on the date your parish migrated to ParishSOFT.
4. Number in first column assists with reading the information. This should be read top to bottom, left to right.
5. Default statement regarding the IRS disclaimer is printed on the statement. This cannot be modified.
6. Page numbers indicate multiple pages exist for this user.

1.



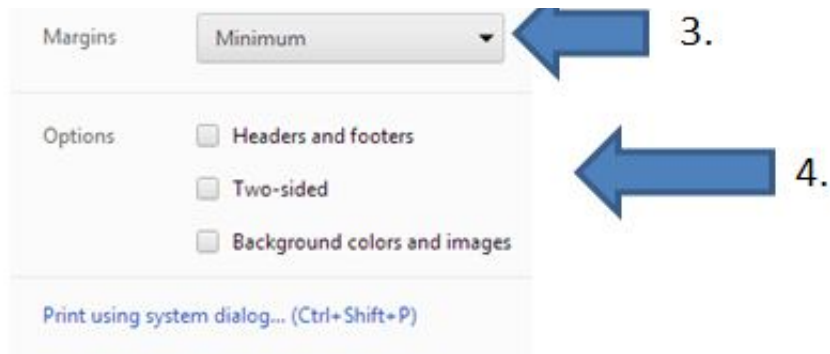
The screenshot shows a Google Chrome browser window displaying a web page from ParishSOFT. The address bar shows the URL: <https://connectnow.parishsoft.com/siouxfalls/ViewOfferingReport.aspx>. The page content includes the parish name "Holy Family", address "222 N Kimball St, Mitchell, SD 57301", and "Statement date: 11/18/201". The browser's print toolbar is visible, showing "Page 1 of 2" and a "PDF" dropdown menu. A blue arrow labeled "1." points to the printer icon in the toolbar.

1. A print-preview window will open, click on the printer icon.



The screenshot shows a print dialog box with the following settings:

- Print**: Total: 1 sheet of paper. A blue arrow labeled "5." points to the "Print" button.
- Destination**: HP LaserJet 4350 PCL 5. A "Change..." button is below it.
- Print Range**:  All. A blue arrow labeled "1." points to this option. Below it is a text input field containing "e.g. 1-5, 8, 11-13".
- Print Name**: Mc and MrsSmith
- Copies**: 1. There are "+" and "-" buttons next to the number.
- Layout**:  Portrait. A blue arrow labeled "2." points to this option. Below it is the  Landscape option.



1. Print ALL pages.
2. Layout is Portrait
3. Margins are Minimum.
4. Options should ALL be Unchecked.
5. Click Print

This is the CN Family Suite statements. These statements cannot be modified in the CN Family Suite. They can be sent to a RTF file and modified in WORD. However, each statement needs to be updated manually.

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You are a user of ParishSOFT.

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