

Carla Haiar <chaiar@sfcatholic.org>

Your campaign CN Family Suite Tips and CFSA 2016 has been sent

Constant Contact <support@constantcontact.com> Reply-To: null@coi003.confirmedcc.com To: chaiar@sfcatholic.org Tue, Dec 22, 2015 at 5:04 PM



Dear Carla Haiar,

Your campaign 'CN Family Suite Tips and CFSA 2016' was sent on 12/22/2015 around 6:04 PM EST.

Below is a copy of the message your subscribers received. See how your campaign is doing by visiting Reports in your account to get real-time results and stats.

Subject: CN Family Suite Tips and CFSA 2016

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



CN Family Suite Newsletter

Merry Christmas! Please let me know of any additional issues or concerns with the update to 4.3.5 The is a problem with contribution list display order. This is a high priority fix for ParishSOFT. Also, please r note of a meeting at the Chancery Office organized by Denise Hanson regarding end of year processing. will also walk through the CFSA 2016 processing. If you need an agenda or missed the invitation, please email <u>Denise Hanson</u>

Previous Tips and Tricks can be found HERE!

CFSA 2016 CN Family Suite processing

The list of Registered and Active parishioners is being compiled and finalized on 1/8/2016. It takes a few

weeks to print the CFSA letters. However, if there are critical changes to your database, I can usually g the printer to pull or reprint the letter. Most important, are deceased people. Please be sure to update yc database promptly when a death occurs and notify me via email if this occurs after 1/8/2016. Thank you

Create a CFSA 2016 Fund

Offering, Funds

- 1. Add Funds
- 2. Fund #: 9001-2016
- 3. Description: CFSA 2016
- No dates are necessary
- 4. Tax Deductible: Checked
- 5. Require Pledge: Checked

Fund Manage 1 Fund #: 9001-2016 2 10 records ID ID Description: CFSA 2016 3 Fund # Description: CFSA 2016 3 edge Diocesan Fr ID 9001-2014 CFSA ID <				Add Fund	edges Ad	Batches Ple	unds
10 records To a Description? CFSA 2016 3 Fund # Descr Start Date: cfsa End Date: 9001-2014 CFSA: Diocesan #: 9001-2015 CFSA External #: 10 records To a Description? CFSA 2016 3 edge Diocesan Fi			2	Fund # 9001-2010	1 :	Manage	und
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4				External #: 4	CFSA .	9001-2015	20
3 9001-2015-01 CFSA : Tax Deductible: Duition Fund:			n Fund: 🗐	Tax Deductible: 🕑	CFSA .	9001-2015-01	10
Require Pledge: 🖉 Enable Import: 📄 🖤			Import: 📄 😈	Require Pledge: 🖉 En		4 1 /2 Decenter	and the second
Add Fund Cancel			Add Fund Cancel	5	100	A I (3 Kecords)	age 1 o

Optional: Create a CFSA 2016 Non Tax Fund

Credit card and/or EFT payments will be an option for donating to CFSA 2016. If you are unable to proce credit cards or EFT, you may forward onto the Catholic Foundation for Eastern South Dakota to process you. However, in order to keep track of your total giving, please create a Non Tax fund. You are unable generate a tax statement as the parish did not receive the payment. Please add the gift to your CFSA 20 Non Tax fund.

Offering, Funds 1. Add Funds 2. Fund #: 9001-2016-01 3. Description: CFSA 2016 Non Tax No dates are necessary 4. Tax Deductible: UNCHECKED 5. Require Pledge: UNCHECKED

Co	nnectvo	Family Suite	1			P - CONTACT - HOME - STONIOUT
Home	Family Direct	tory Offering Administration				
Funds	Batches Pla	CFSA 2016 Non T	Tax			
Fund	Manage	1 Fund has successfully been o	created. 2			
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00	9014	Capital Campaign	3293	V		
00	9010	Catholic Relief Services	3306			
00	4324	CCD (Youth) Book Fees	3315			

Add Zero Pledge Records

Offering

- 1. Pledges
- 2. Select CFSA 2016 Fund from drop down
- 3. Select Registered (You only want to add pledge records for Registered famililes).
- 4. Select Active (You only want to add pledge records to Active families).
- 5. Select Family
- 6. Click View Pledges

There should NOT be any pledge records as we just created this fund.

7. Click +Add \$0 Pledges

ConnectNow	Family	Suite		HELP	- CONTACT - HOME	- SIGN OUT
Home Family Directory	Offering Admi	nistration				
Funds Batches Pledges	Posting Contri	bution List Giving History	Reports			
Pledge Mana 1 er Fund CPSA 2016 10 records V 🛱 C A A C Type Env #	+ New Piedge + Last Name	Add \$0 Pledges 7 blete Ple	Active Fund	Piedge Ty Family	5 View Pledges Start Date	, 6 End Date
			No	Pledges found.		
No data to paginate						
© 2015 ParishSOFT, LLC. f 🍤	In				Paris	SOFT

Add Zero Pledge Records

1. Be sure to enter the date 1/1/2016 for \$0 pledge records added.

Zero dollar pledge not have existing	s will be created for families matching the criteria below and do pledges.
Organization:	
Fund:	CFSA 2016
Family Status:	Registered
Family Group:	Active
Pledge Date:	1/1/2016 📷 1

The page at conne	ctnow.parishsoft	t.com says: ×
Create \$0 pledges? Th minutes.	is process could tak	ke several
Prevent this page f	rom creating addition	onal dialogs.
	ОК	Cancel

Add \$0 Pledge Records Message

A message will appear letting you know this process may take some time. It is best to add \$0 Pledge records at the end of the day.

Click OK, you will receive a message with a number of records added.

Pledge Management

Pledge records should be listed and created for ALL Registered and Active families in your parish.

1. You will need to select the Fund, Family Status, Family Group and Pledge Type each time you naviga this page.

- 2. Be sure to click View Pledges to ALWAYS get the most recent pledge information.
- 3. Note the Fund.
- 4. Note the Start date. Any postings to be applied to this pledge must be AFTER this date.

Co	n	nec	Nôw	Fan	nily Suite	•							
Hor	ne	Family	Directory	Offering	Administration	1							
unds	1.6	Batches	Pledges	Posting	Contribution Li	st Giving History	Report	s					
lec	lge	Man	agemer	nt	1	Family Status		Family Group		Pledge Ty	pe		
FSA	2016				2	Registered	×	Active	×	Family	×	View Pledges	2
													_
10 re	cords	s 🐱 🗎	10 +	+ New Ple	dge 🕂 Add \$0	Pledges 📋 Delete P	ledge(s)						
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Adding a Batch for Pledge Card processing

After the campaign begins and you receive pledge cards and payments, create batches. The batches wi contain 2 numbers, a cash total and a pledge total.

The Pledge total is the Total Pledge amount written on the pledge card. The cash amount is the actual do you received as a down payment with the pledge card. When processing pledges for the first time, your amount should be less than or equal to your Total Pledge Amount.

Lets create a batch to process a pledge card with a \$1000 pledge, \$200 down payment.

- To Create a New Batch:
- 1. Offering, Batches, +Add Batch
- 2. Enter name of batch date plus CFSA
- 3. Enter Fund: CFSA 2016
- 4. Cash Total is the amount of dollars you are depositing in the bank. This case it is the \$200 down payment.
- 5. Pledge card total was \$1000
- 6. Enter the date of processing, in our case, it was for March of 2016.

Click Add Batch. Click Close.

ConnectNow Family Suite	
Home Family Directory Offering Administration	
Funds Batches Pictures Posting Contribution List Giv Batch Mana	ving History Reports
Create new batch	
A Batch Description: 20160307	Fund:" CFSA 2016 Status: Open
Cash Total:" \$ 200.00 Date Op	Dpened: 3/7/2016 🗰 6 Date Closed:
Cash Balance: \$ 0,00 4 Pledge	e Total: § 1000.00 Transaction Count: 0
E Pledge Ba	lalance: § 0.00 Batch Owner: Haiar, Carla
Comment:	
	Add Batch Cancel

Enter the Pledge Details

Navigate to Pledges within Offering tab. Select the CFSA 2016 Fund, Registered, All Groups and Click Pledges to see all pledge records for this fund.

Pledge Management				E				
Fund		Family Status		Family Group		Pledge Typ	e	
CFSA 2016	4	Registered	~	All Groups	~	Family	~	View Pledges

Enter the Pledge Information:

Click on the Edit icon next to the person you wish to add the pledge record for.

- 1. Verify this is the correct fund and person.
- 2. Enter the payment date as TODAY, this MUST be AFTER the Pledge Date.

3. Enter \$200 as the amount of cash/check you received and will deposit in the bank.

4. IMPORTANT: If you selected the fund correctly, you should see your batch HERE in the drop down I Be sure to SELECT the Batch HERE!

- 5. Enter \$1000 for the amount of the pledge.
- 6. You may change the number of months to 10.

7. The remaining payments amount will be re-calculated. Keep all MONTHS checked in case you wish t run payments on ANY given month.

- 8. Enter reason as Pledge card received
- 9. Click Save

i	Organization			CFSA 2016 Regist	y S ter	Status Family Group red All Groups							
	Donor Record												
ļ	First/Last Name	Env #	Pl	ledge ID Phone # Addre	es	s 1 Addre	ss 2	City/State/Postal					
	Pledge Record Pledge Date*		5	2 First Payment Date*	ra	INWOOD DI APL 112		Pierce 30 37301					
	1/1/2016			3/7/2016									
	Down Payment	_		Payment Type*		Check #	Pos	st to*		Batch		C	
	\$ 200.00	3		Cash ~			En	tire Family	~	20160307	4 ~		
	Pledge Amount	dge Amount	-		Adjustments		Adjusted Balance	Total Paid			Balance		
	\$1000.00	5	+	\$0.00	=	\$1000.00	- \$0	0.00		= \$1000.00			
	Frequency	_		# of Months		Payment Amo	S	tatement Months -	iele	ct All - Clear All			
	Monthly		-	10 0		\$ 80.00	Se	elect each month a sta	tem	ent should be sent			
	Pledge Notes (30	000 cha	racte	ers left) Reason (2	20	0 characters left)*		January 🗹 April February 🗹 May March 🕑 June		July <table-cell> O August <table-cell> N September <table-cell> D</table-cell></table-cell></table-cell>	ictober iovember iecember		

Pledge Details - important items!

1. You can ALWAYS increase a Pledge Amount by clicking on <u>Adjustments</u> link and adding a positive dc amount. You may reduce a Pledge Amount by entering a negative dollar amount.

- 2. You can see ALL applied payments by clicking on the Total Paid link.
- 3. You may see a complete report of this pledge by clicking on Quick Reports and Pledge Details.

į	Organization			C	und FSA 2016	Family Regist	sta ered	us Family Grou All Groups	P							
	Donor Record															
	First/Last Name	Env #	P	edge ID 6374	Phone #	Addr 400 I	ess 1 Parkv	ood Dr Apt 112	Address	2 Cit Pie	y/State/Posta erre SD 57501	al L				
	Pledge Record															
	Pledge Date*			First Pay	ment Dat	e*										
	1/1/2016			3/7/201	16											
	Down Payment			Paymen	t Type*		C	neck #		Post to	*		1	Batch		
	\$ 200.00			Cash		~				Entire	Family	~		20160307	~	
	Pledge Amount*			Adjustm	ents 1		A	justed Balance		Total I	aid			Balance		
	\$ 1000.00		+	\$0.00			= {	1000.00		\$0.00	2		=	\$1000.00		
	Frequency			# of Mo	nths*		Pa	yment Amount*		State	ment Months	- Sele	ct	All - Clear All		
	Monthly	~		10			S	80.00		Select	each month a	statem	en	t should be sent	s	
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Pledge Details - Adjustments

1. Enter the date of the adjustment, must be AFTER the Pledge Date.

2. Enter the amount, positive amount will increase the total pledge, a negative will reduce it.

3. Click Add. This will create the entry and display at the bottom of the form. There is no limit to the nul of adjustments you can add for a pledge. HOWEVER, these adjustments do NOT appear on some reports/statements. Use wisely.

4. Click Close

3/17/2015 S 100.00 Admin V Increase Pledge Amount	Add
Date Amount Type User Comment	
No data to display	

Pledger List - Reports

Most complete report of Pledges and their balances can be found under Offering.

- 1. Reports
- 2. Pledges
- 3. Pledger List
- 4. Select the CFSA 2016 fund.
- 5. Click Next.

riome Famil	y Directory	Offering	Administratio	n	1		
Funds Batches	Pledges	Posting	Contribution Li	st Giving History	Reports		
Offering Re	eports						
Select Report			Fu	id Filters			
Category	Rep	ort		Description		Fund #	
Batches	Nor	-Pledger List		cfsa			
Contributions	Pas	Due		CFSA 2014		9001-2014	
Pledges	Plea	lger List	3 [CFSA 2015		9001-2015	
	Stat	ements	6	CFSA 2016		9001-2016	
				4			
							_

Enter Pledge Date Range. and View Report. You will see Pledge Amount (this is Pledge Total less Adjustements) and Balance.

Fund - CFSA 2016 Pledge Start Date Range : 01/01/2005 - 12/31/2016				1		2
Family / Member Address		PledgelD	Pledge Start Date	Pledge Amount	Paid	Balance
^	Apt 112 3371	376374	01/01/2016	0.00	0.00	0.00
	4458	376373	01/01/2016	0.00	0.00	0.00
3	532 - 2301	376375	01/01/2016	0.00	0.00	0.00
		TOTALS		0.00	0.00	0.00

ParishSOFT CN Family Suite Training

ParishSOFT offers video training for the CN Family Suite at the site below. Review the first column title 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

call with ANY Questions!

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