

Carla Haiar <chair@sfcatholic.org>

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

Constant Contact <support@constantcontact.com>

Tue, Dec 22, 2015 at 5:04 PM

Reply-To: null@coi003.confirmedcc.comTo: chair@sfcatholic.org

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. There is a problem with contribution list display order. This is a high priority fix for ParishSOFT. Also, please note of a meeting at the Chancery Office organized by Denise Hanson regarding end of year processing. I will also walk through the CFSA 2016 processing. If you need an agenda or missed the invitation, please email [Denise Hanson](mailto:Denise.Hanson)

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 get the printer to pull or reprint the letter. Most important, are deceased people. Please be sure to update your 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

The screenshot shows the 'Add Fund' dialog box in the ConnectNow Family Suite software. The dialog box has the following fields and options:

- Fund #: 9001-2016
- Description: CFSA 2016
- Start Date: [Empty]
- End Date: [Empty]
- Diocesan #: [Empty]
- External #: [Empty]
- Tax Deductible:
- Require Pledge:
- Enable Import:

The background shows a 'Fund Management' table with the following data:

Fund #	Description
9001-2014	CPSA
9001-2015	CPSA
9001-2015-01	CPSA

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 process 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 to generate a tax statement as the parish did not receive the payment. Please add the gift to your CFSA 2016 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



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 families).
 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



Add Zero Pledge Records

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

Add \$0 Pledges


Zero dollar pledges will be created for families matching the criteria below and do not have existing pledges.

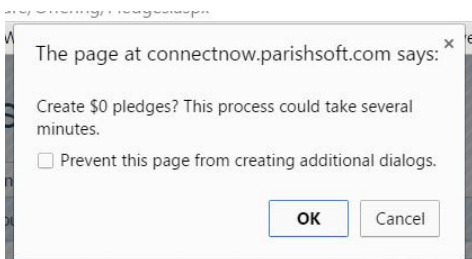
Organization:

Fund: CFSA 2016

Family Status: Registered

Family Group: Active

Pledge Date:  1



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 navigate 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.


Family Suite

Home
Family Directory
Offering
Administration

Funds
Batches
Pledges
Posting
Contribution List
Giving History
Reports

Pledge Management

Fund

Family Status

Family Group

Pledge Type

10 records

 New Pledge
 Add \$0 Pledges
 Delete Pledge(s)

	Type	Env #	Last Name	First Name	Fund	Start Date	End Date
<input type="checkbox"/>			Allis		CFSA 2016	1/1/2016	
<input type="checkbox"/>			Brat		CFSA 2016	1/1/2016	
<input type="checkbox"/>			Bro		CFSA 2016	1/1/2016	

Page 1 of 1 (3 Records)
< 1 >

Adding a Batch for Pledge Card processing

After the campaign begins and you receive pledge cards and payments, create batches. The batches will 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 dollar amount you received as a down payment with the pledge card. When processing pledges for the first time, your cash amount should be less than or equal to your Total Pledge Amount.

Let's 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. In 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.

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.

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 menu. 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 to run payments on ANY given month.
8. Enter reason as Pledge card received
9. Click Save

Edit Pledge (376374) Quick Reports ▼

Pledge List Filters

Organization	Fund	Family Status	Family Group
	CFSA 2016	Registered	All Groups

Donor Record

First/Last Name	Env #	Pledge ID	Phone #	Address 1	Address 2	City/State/Postal
		376374		400 Parkwood Dr Apt 112		Pierre SD 57501

Pledge Record

Pledge Date* First Payment Date*

Down Payment* Payment Type* Check # Post to* Batch

Pledge Amount* Adjustments Adjusted Balance Total Paid Balance

Frequency* # of Months* Payment Amount*

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

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

Pledge Details - important items!

1. You can ALWAYS increase a Pledge Amount by clicking on [Adjustments](#) link and adding a positive dollar 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.

Edit Pledge (376374) 3 Quick Reports

Pledge List Filters

Organization	Fund	Family Status	Family Group
	CFSA 2016	Registered	All Groups

Donor Record

First/Last Name	Env #	Pledge ID	Phone #	Address 1	Address 2	City/State/Postal
		376374		400 Parkwood Dr Apt 112		Pierre SD 57501

Pledge Record

Pledge Date* 1/1/2016 First Payment Date* 3/7/2016

Down Payment* \$200.00 Payment Type* Cash Check # Post to* Entire Family Batch 20160307

Pledge Amount* \$1000.00 Adjustments 1 Adjusted Balance \$1000.00 Total Paid 2 Balance \$1000.00

Frequency* Monthly # of Months* 10 Payment Amount* \$80.00

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

Save Close

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 number of adjustments you can add for a pledge. HOWEVER, these adjustments do NOT appear on some reports/statements. Use wisely.
4. Click Close

Pledge Adjustments for 376374

Add Pledge Adjustments

Date* 1	Amount* 2	Type*	Comment
3/17/2015	\$100.00	Admin	Increase Pledge Amount

Add

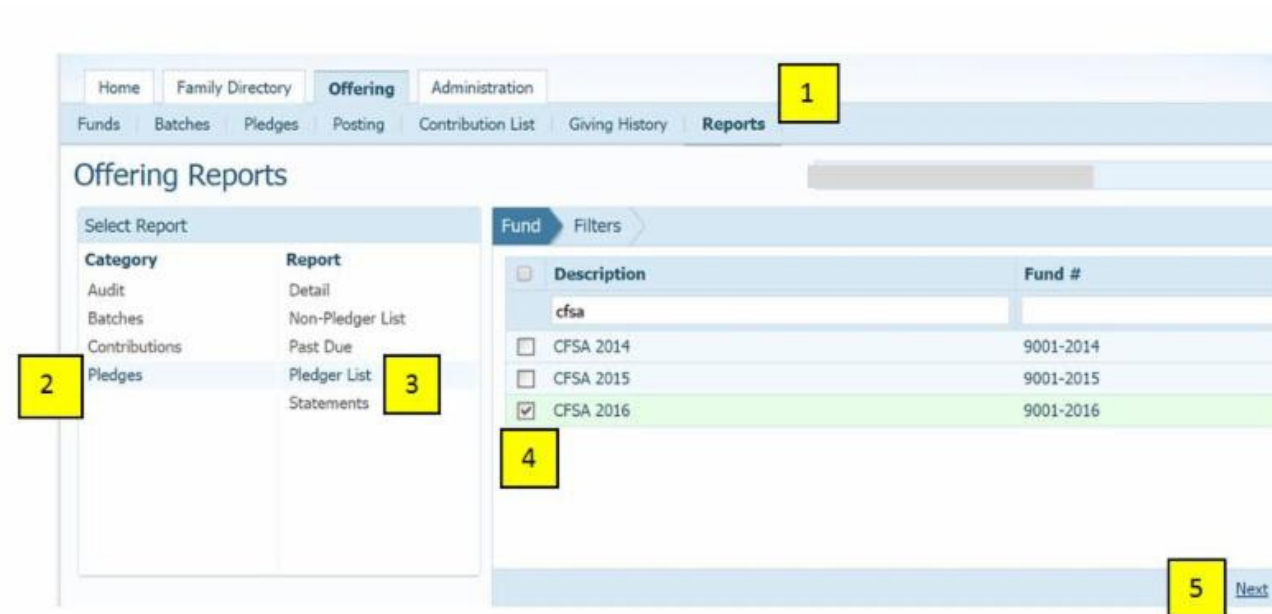
Date	Amount	Type	User	Comment
No data to display				

Close 4

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.



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

Pledge List (3)
Fund - CFSA 2016
Pledge Start Date Range : 01/01/2005 - 12/31/2016

Family / Member	Address	PledgeID	Pledge Start Date	Pledge Amount	Paid	Balance
A	Apt 112 3371	376374	01/01/2016	0.00	0.00	0.00
B	L 4458	376373	01/01/2016	0.00	0.00	0.00
B	L 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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