
ParishSOFT Newsletter - CFSA 2014

Catholic Diocese of Sioux Falls - Carla Haiar <chair@sfcatholic.org>
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To: Carla Haiar <chair@sfcatholic.org>

Thu, Dec 19, 2013 at 12:38 PM

Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill 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 Sioux Falls

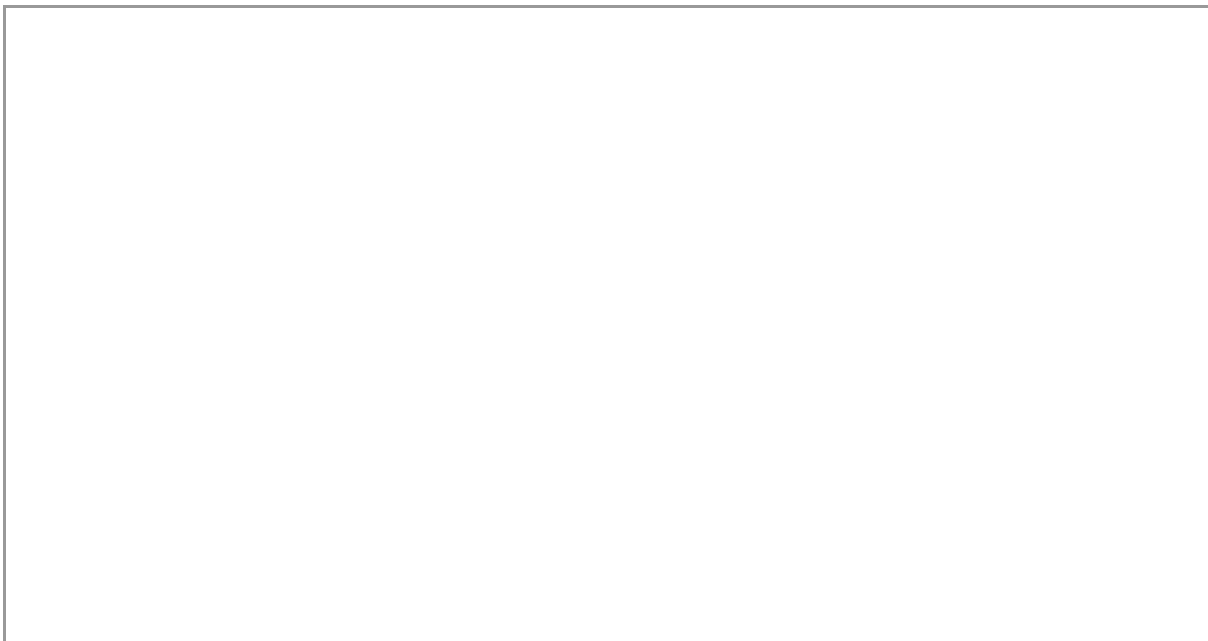


Family Suite

Pledge Processing for CFSA

Follow the steps below to manage and process your CFSA pledges.

CFSA 2014 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

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

Fund Management | Batch Management | Pledge Management | Contribution

Fund Management

10 records

Add Fund

Fund #	Description	Tax Deductible
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)

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

Add Fund

Fund #: 9001-2014

Description: CFSA 2014

Start Date:

End Date:

Diocesan #: 9001-2014

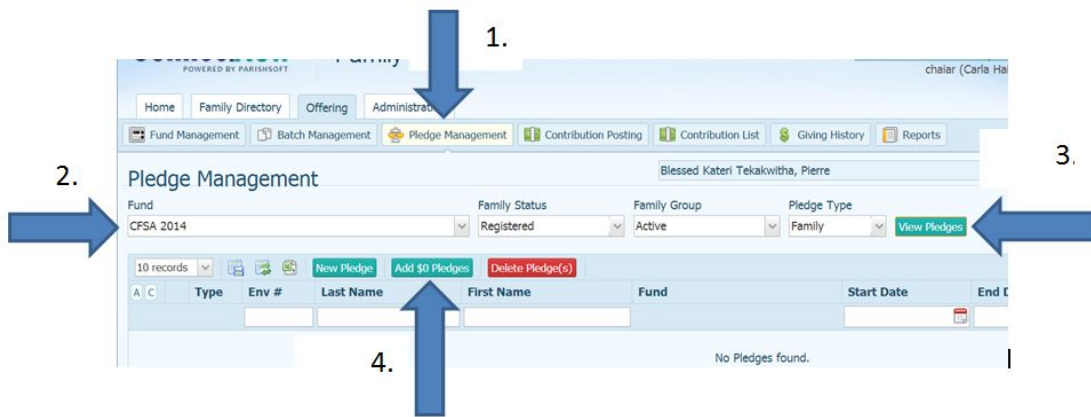
External #:

Tax Deductible:

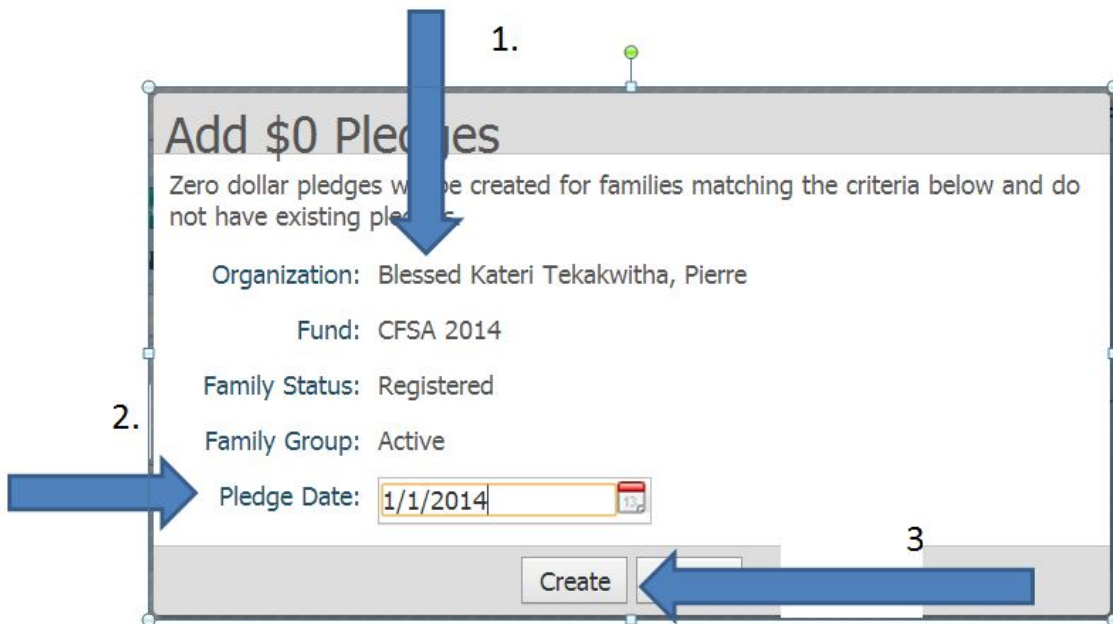
Require Pledge:

Tuition Fund:

Enter the information for the year 2014 as show above.
 Click Add Fund button

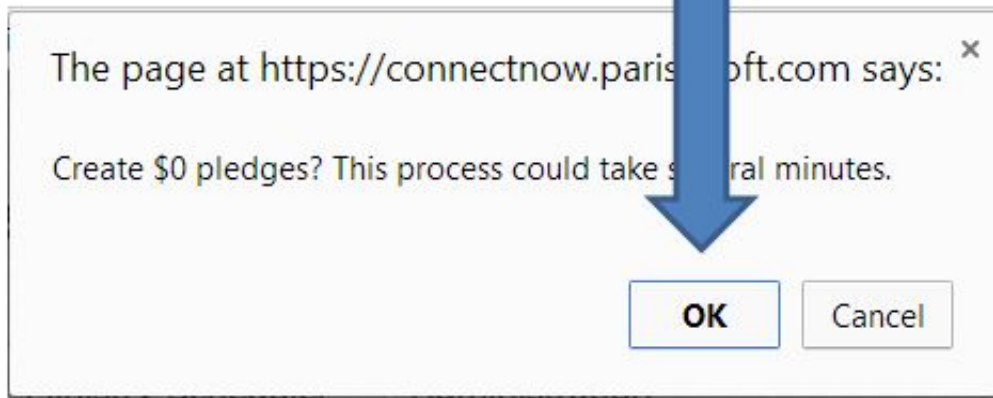


1. Pledge Management.
2. Select Fund CFSA 2014.
3. Family Status = Registered, Family Group = Active, Click View Pledges.
4. Add \$0 Pledges



1. Verify your Organization.
Fund = CFSA 2014
Family Status = Registered
Family Group = Active
2. Pledge Date = 1/1/2014
3. Click Create

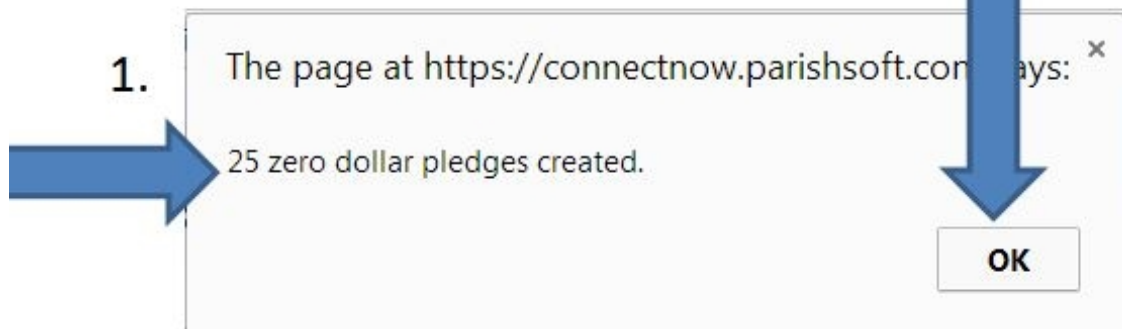
1.



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.

1. Pledge Management

Fund: CFSA 2014 | Family Status: Registered | Family Group: Active | Pledge Type: Family | View Pledges

Type	Env #	Last Name	First Name	Fund	Start Date	End
				CFSA 2014	1/1/2014	
				CFSA 2014	1/1/2014	
				CFSA 2014	1/1/2014	
	440			CFSA 2014	1/1/2014	
				CFSA 2014	1/1/2014	
				CFSA 2014	1/1/2014	
	14			CFSA 2014	1/1/2014	
				CFSA 2014	1/1/2014	
	915			CFSA 2014	1/1/2014	
	59	Jeger	Mike and Cindy	CFSA 2014	1/1/2014	

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

3.

1. Select the fund CFSA 2014, 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

Batch Management

10 records | Add Batch | Delete Batch(s) | Close Batch(s) | Quick Reports

Status	Batch	Cash	Pledge	Count	Fund
Open					

No Batches found.

Page 1 of 0

1. Offering.
2. Batch Management.
3. Add Batch

1. Enter the Batch Name.

2. Select the Fund CFSA 2014.

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. Enter the Batch Name.
2. Select the Fund CFSA 2014.
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. Verify that the batch was successfully received. If everything looks correct, click Close, otherwise click Edit and correct.

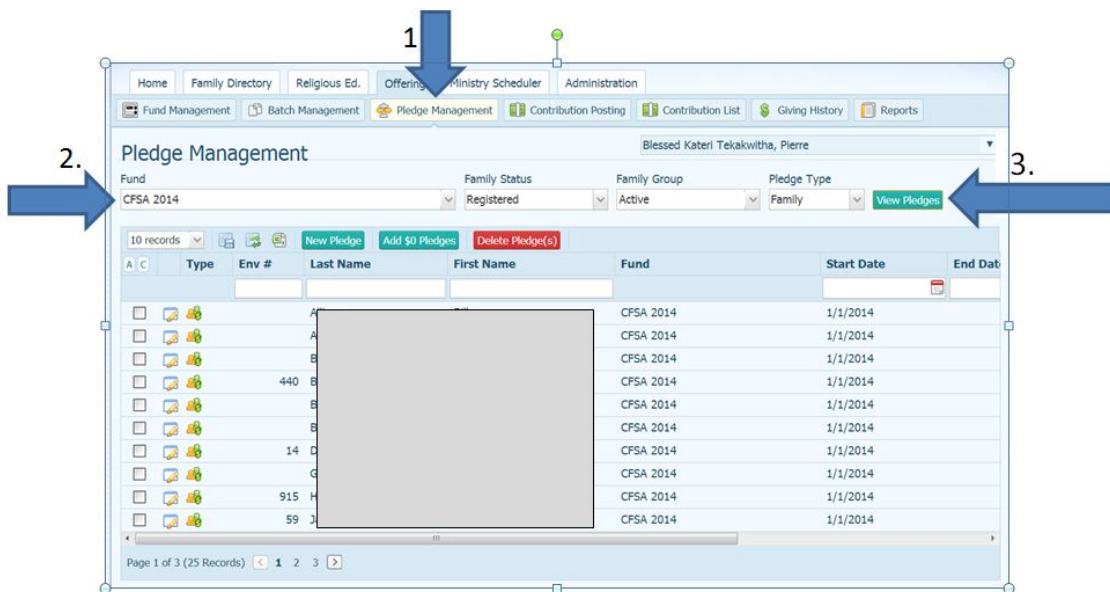
2. Click Close.

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

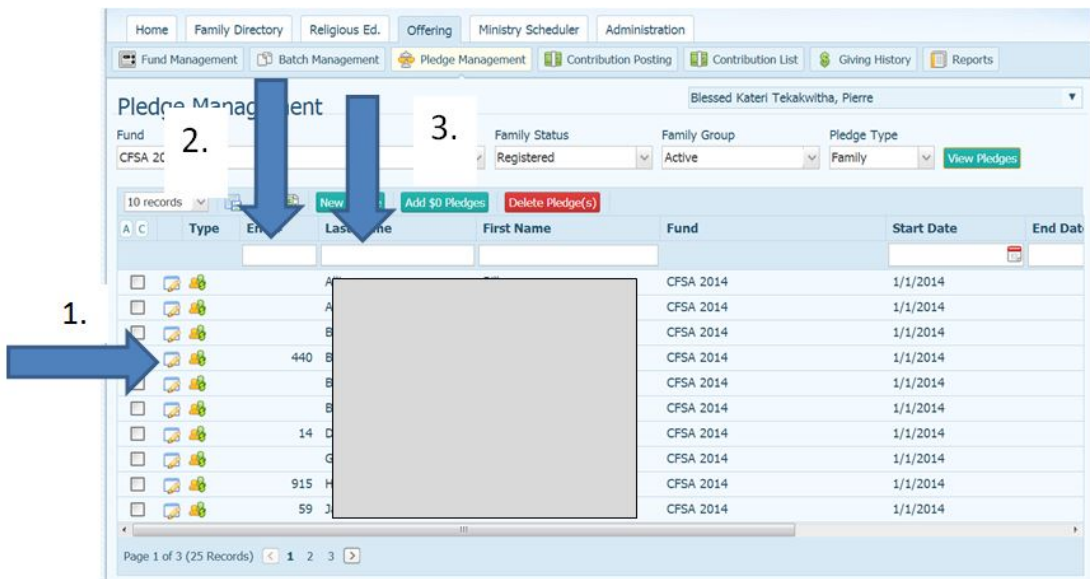
1. The Open batches will appear, take note of the Batch name.

Status	Batch	Cash	Pledge	Count	Fund
Open	CFSA 2014 02 28	\$10,000.00	\$14,000.00	0	CFSA 2014

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



- Under Offering Tab,
 1. Click Pledge Management.
 2. Click CFSA 2014 from the Fund drop down.
 3. Click View Pledges.



1. Click on the Edit icon next to the pledge record you wish to add.
 2. You may enter an envelope number to filter.
 3. You may enter a last name to filter.

Edit Pledge (272865) Quick Reports ▾

Pledge List Filters
 Organization: Blessed Kateri Tekakwitha, Pierre | Fund: CFSA 2014 | Family Status: Registered | Family Group: Active

Donor Record
 First/Last Name: [Redacted] | Env #: [Redacted] | Pledge ID: [Redacted] | Line #: [Redacted] | Address 1: [Redacted] | Address 2: [Redacted] | City/State/Postal: [Redacted]

Pledge Record

1. First Payment Date: 2/28/2014

2. Down Payment: \$500.00

3. Payment Type: Cash | Check #: 5124

4. Post to: Entire Family | Batch: CFSA 2014 02 28

5. Pledge Amount: \$2000.00

6. Adjustments: \$0.00

Adjusted Balance: \$2000.00

Total Paid: \$0.00 | Balance: \$2000.00

7. Frequency: Quarterly | # of Months: 12 | Payment Amount: \$500.00

8. Statement Months - Select All - Clear All
 January April July October
 February May August November
 March June September December

9. Pledge Notes (3000 characters left) | Reason (200 characters left): [Redacted]

Save | Close

1. Enter today's date as the First Payment Date.
 2. Enter 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

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.

A	C	Status	Batch	Cash	Pledge	Count	Fund
<input checked="" type="checkbox"/>		Open	CFSA 2014 02 28	\$10,000.00	\$14,000.00	2	CFSA 2014

- 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 -

1. ↓

2. →

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

3. →

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

4. →

	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

5. ↑

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) Reports ▼

Pledge List Filters

Organization: Blessed Kateri Tekakwitha, Pierre Fund: CFSA 2014 Family Status: Registered Family Group: 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: 1/1/2014 First Payment Date: 2/28/2014

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

Pledge Amount: \$2000.00 Adjustments: \$0.00 Adjusted Balance: \$2000.00 Total Paid: \$500.00 Balance: \$1500.00

Frequency: Quarterly # of Months: 12 Payment Amount: \$500.00

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

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, Pledge Details.

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.

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 dropdown box.

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