

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 Sioux Falls*



Family Suite

## CFSA 2015 - Credit Card Processing

Credit card payments for CFSA 2015 are new in the 2015 annual appeal. You have a couple of options available to you for processing.

1. You can process the credit card payments yourself. If you are utilizing credit card processing for other items now through your own bank or Online Giving, you may also process CFSA 2015 credit card payments the same way. You would update the Pledge Record for the CFSA 2015 tax deductible fund as with all other payments because you are receipting the money.
2. The Catholic Foundation of Eastern South Dakota (CFESD) can process your credit card payments and pledges for CFSA 2015. However, since you are NOT receipting the money, you cannot post to a tax deductible fund. Please follow the instructions below for keeping monitoring your Credit Card payments processed at the CFESD for CFSA 2015.

The screenshot shows the 'Add Fund' dialog box in the ConnectNow Family Suite. The 'Fund #' field is set to '9001-2015-01' and the 'Description' is 'CFSA 2015 Non Tax'. The 'Tax Deductible' checkbox is unchecked. A blue arrow labeled '1.' points to the 'Fund #' field, and another blue arrow labeled '2.' points to the 'Tax Deductible' checkbox.

Only do this processing IF the Foundation office is processing your credit card payments!!

Create a NON-Tax fund for CFSA 2015.

1. On Offering, Funds, Enter Fund # of 9001-2015-01 and CFSA 2015 Non Tax as Description.
2. Be sure Tax Deductible is UNCHECKED.

ConnectNow Family Suite

Home Family Directory Offerings Administration

Batches Pledges Contribution List Giving History Reports

Blessed Kateri Tekakwitha, Pierre

Fund: CFSA 2015 Non Tax Family Status: Both Family Group: All Groups Pledge Type: Family View Pledges

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

A	C	Type	Env	Last Name	First Name	Fund	Amount	Balance	Start Date	End Date	Pledge ID
No Pledges found.											

Page 1 of 0 (0 Records)

Go to Offering, Pledges

1. Select the CFSA 2015 Non Tax fund. Be sure filters are Both, All Groups, Family
2. Click View Pledges
3. Click + New Pledge

There will be NO pledges displayed when you first go to the pledges screen.

Pledge Family

Pledge List Filters

Organization: Blessed Kateri Tekakwitha Fund: CFSA 2015 Non Tax Family Status: Both Family Group: All Groups

10 records Add Pledge

Env #	Last Name	First Name	Phone	Family DUID	# Pledges
<input type="radio"/>	Alli			0714	0
<input type="radio"/>	Alun			32	0
<input type="radio"/>	Bad			42	0
<input type="radio"/>	Bad			11	0
<input checked="" type="radio"/>	Bran			74	0
<input type="radio"/>	Bro			40	0
<input type="radio"/>	Bur			82	0
<input type="radio"/>	Dro			47	0
<input type="radio"/>	Gill			37	0
<input type="radio"/>	Gri			36	0

Page 1 of 4 (38 Records) 1 2 3 4

Close

1. Click the button next to the person you wish to add a pledge record to.
2. Click Add Pledge

1. Click on Clear All to uncheck statement months as you will NOT be sending out statements for a Non Tax CFSA payment.

2. Note the Fund is CFSA 2015 Non Tax. Assume that ALL payments will be processed successfully.

Therefore, enter the Down Payment and Pledge Amount as equal assuming Paid in Full.

*The CFESD office will contact you if there is a problem with any payment.*

3. Add a Note that the pledge will be processed by CFESD. Click Add to create the Pledge Record.

You will be returned to the Add Pledge screen, you may continue to add CFSA 2015 Non Tax pledges as needed.

1. Click the Fund drop down and change to CFSA 2015 Fund, Both, All Groups, Family, click View Pledges.

2. Search for the family you just created a NON Tax Pledge record for. Check the box next to his name.

3. Click Delete Pledge and delete the 0 pledge record in the CFSA 2015 taxable fund.

If you did not create zero pledge records, you do not need to do this step. This is necessary to remove this pledge record so we do NOT send a reminder to this person if no card is marked as received.

# End of Year Statements

The Catholic Foundation for Eastern South Dakota will acknowledge the gift and generate an End of Year statement for any credit card processing that occurs at their office.

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