

# ParishSOFT Newsletter - End of Year Statements

Catholic Diocese of Sioux Falls - Carla Haiar <chair@sfcatholic.org>  
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Tue, Nov 19, 2013 at 11:12 AM

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

[View this email in your brow ser](#)

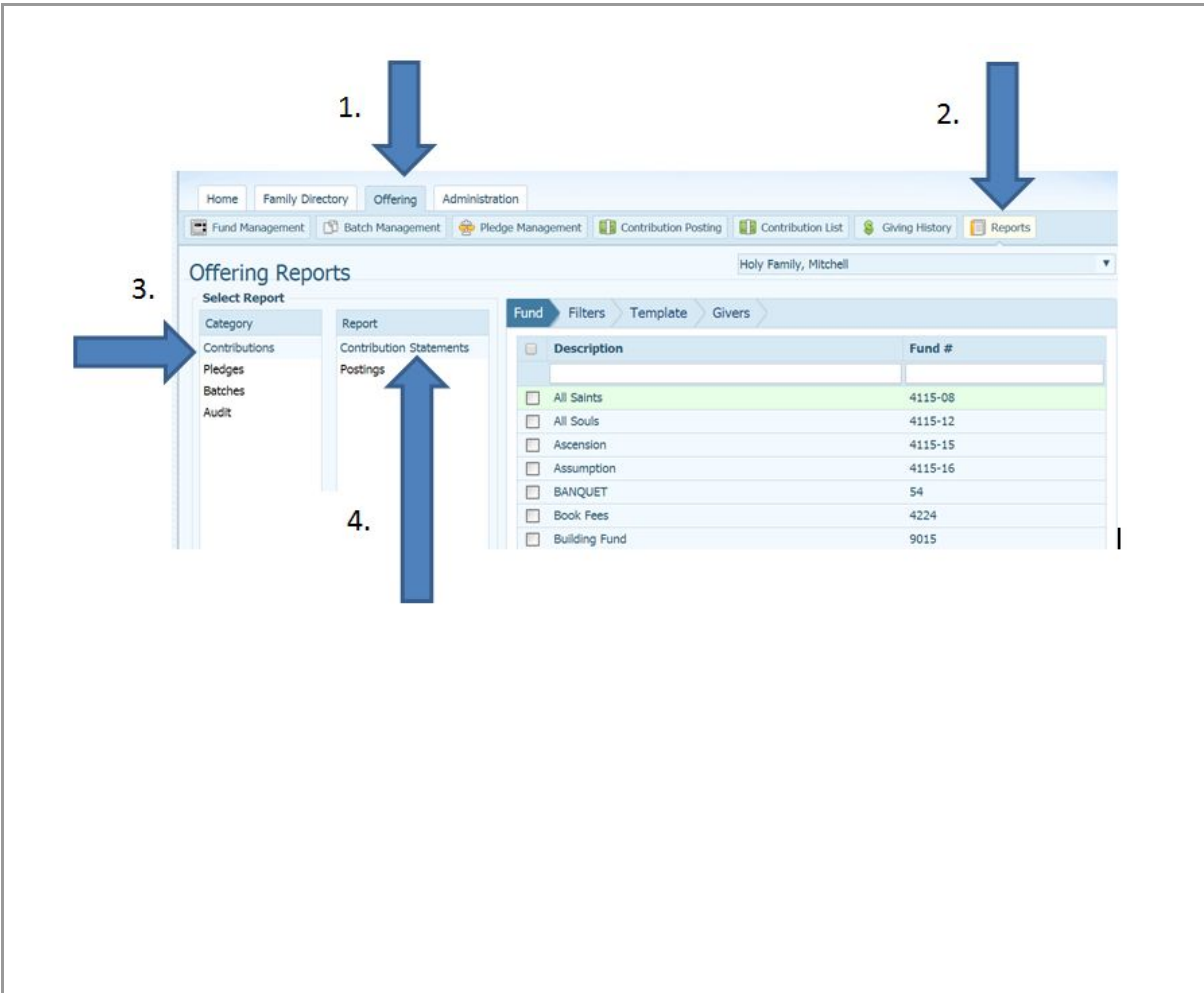


Catholic Diocese of Sioux Falls



# End of Year Statements

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



The screenshot shows the ParishSOFT interface for generating end of year statements. The steps are indicated by numbered arrows:

1. Arrow pointing to the 'Reports' button in the top navigation bar.
2. Arrow pointing to the 'Offering Reports' section in the left sidebar.
3. Arrow pointing to the 'Contributions' category in the 'Select Report' dropdown.
4. Arrow pointing to the 'Contribution Statements' report in the 'Report' dropdown.

The main content area shows a table of offering reports for 'Holy Family, Mitchell'.

Description	Fund #
<input type="checkbox"/> All Saints	4115-08
<input type="checkbox"/> All Souls	4115-12
<input type="checkbox"/> Ascension	4115-15
<input type="checkbox"/> Assumption	4115-16
<input type="checkbox"/> BANQUET	54
<input type="checkbox"/> Book Fees	4224
<input type="checkbox"/> Building Fund	9015

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](#)

<input checked="" type="checkbox"/>	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

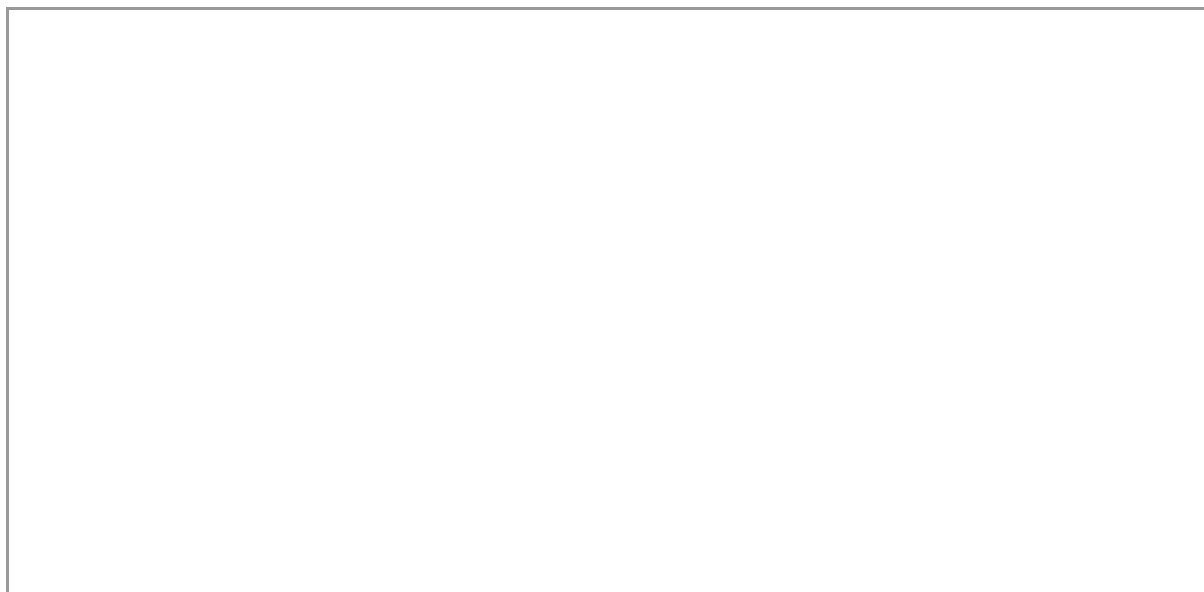
Page 1 of 7 (62 Records) < 1 2 3 4 5 6 7 >

\* 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. Filters

2. Contribution Dates

3. Family Filters

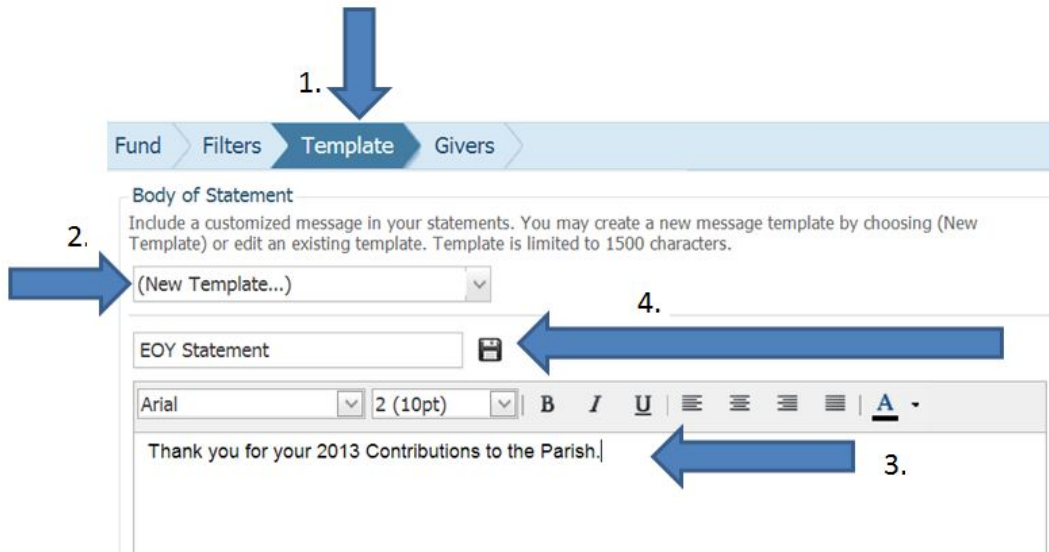
4. Next

1. Filters will now be highlighted.
2. Verify date range, should be 1/1/2013 through 12/31/2013.
3. Family Filters should be Registration Status of Both, Family Group of All Groups, Family Work Groups of All Groups. If a person gives to your parish, you want to send them a statement regardless of registration status and group values.
4. Range of Contributions, set minimum to \$1. If you do NOT enter a minimum amount, EVERYONE in your parish will receive a letter. Please enter a \$1 for a minimum amount.
5. Click Next.

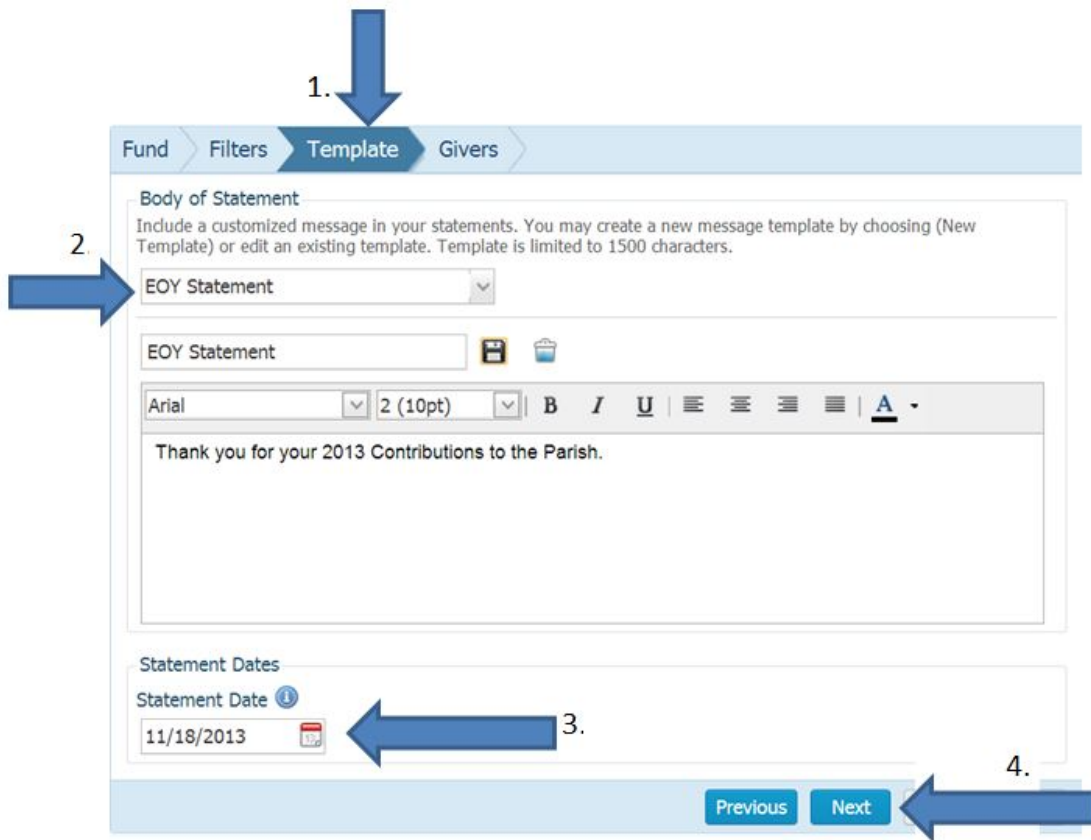
1. Template

2. (New Template...)

1. Template will be highlighted.
2. Click (New Template ...).



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. Your organization and address will print in the upper left hand corner of your screen.
2. Statement date is from the Template screen.
3. Empty space is padded in to enable you to use a window envelope. This eliminates the need to print labels.
4. Name and address of family contributor.
5. Letter will appear below salutation. This is the same as the Mailing Name.

**Family Contributions - Detail**  
 Period 01/01/2013 - 12/31/2013  
 Env. # 1  
 Member since 07/26/2013

**Total Contributions: \$1615.00**  
 Period 01/01/2013 - 12/31/2013

	Date	Check #	Amount	Fund	Date	Check #	Amount	Fund
1	01/7/13		\$25.00	Envelopes-Adult	03/11/13		\$50.00	Envelopes-Adult
	01/21/13		\$50.00	Envelopes-Adult	9	03/18/13	\$25.00	Envelopes-Adult
3	01/28/13		\$25.00	CC CAPITAL CAMPAIGN		03/18/13	\$150.00	CFSA 2013
	01/28/13		\$25.00	Envelopes-Adult	11	03/25/13	\$25.00	CC CAPITAL CAMPAIGN
5	02/4/13		\$50.00	Envelopes-Adult		03/25/13	\$25.00	Envelopes-Adult
	02/25/13		\$25.00	CC CAPITAL CAMPAIGN	13	04/2/13	\$25.00	Rice Bowl
7	Mr and McsSmith			Envelopes-Adult		04/2/13	\$25.00	Easter

No goods or services were provided by the church or its organization in return for these contributions.  
 Page 1 of 2

1. Family Detail statement is only statement available in CN Family Suite. It is also the Diocesan 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.

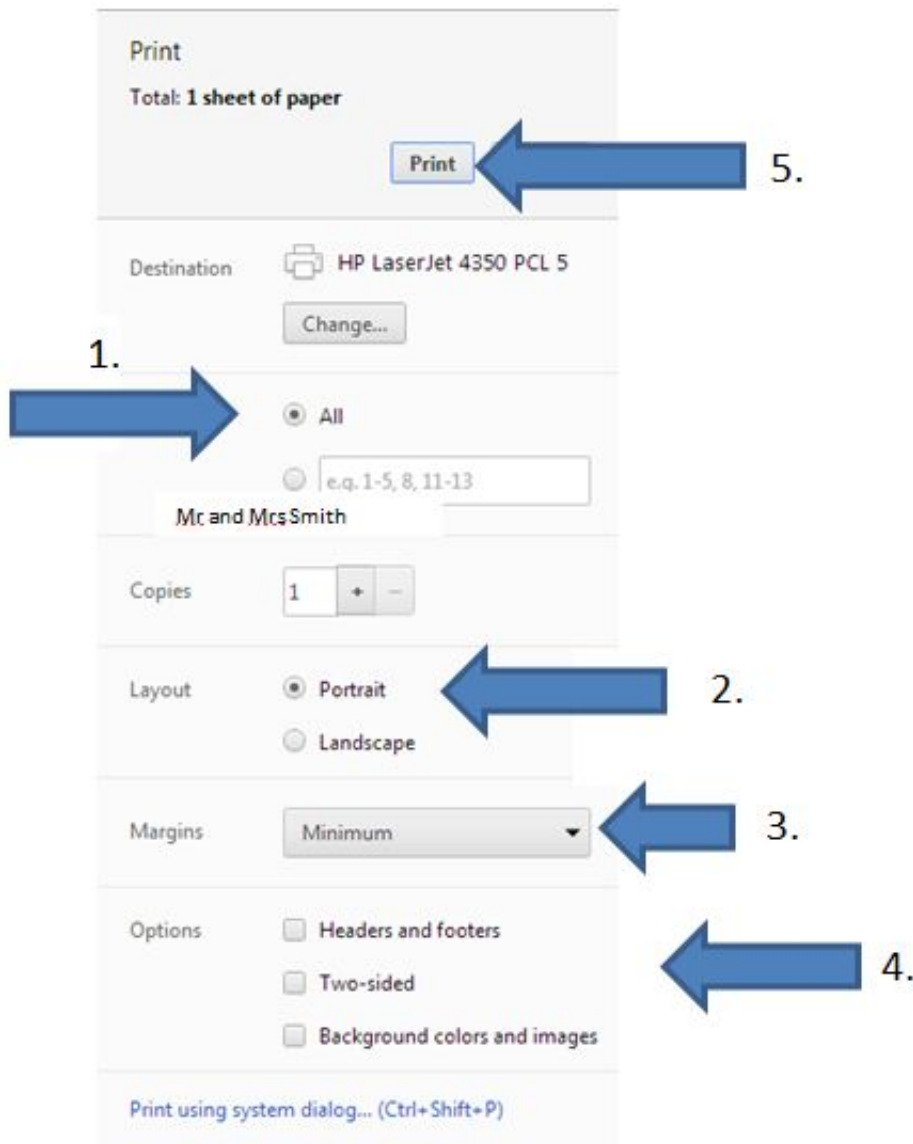
https://connectnow.parishsoft.com/siouxfalls/ViewOfferingReport.aspx - Google Chrome  
 ParishSOFT LLC https://connectnow.parishsoft.com/siouxfalls/ViewOfferingReport.aspx

Page 1 of 2 PDF

**Holy Family**  
 222 N Kimball St  
 Mitchell, SD 57301

Statement date: 11/18/201

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



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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