



## Zero Givers Report

It is that time of year to check who has not given to a particular fund. You can find this list quickly but running your Contribution Statement Report for the fund. In this case, I will be looking at CFSA 2016.

Previous Tips and  
Tricks can be found [HERE!](#)

## ParishSOFT CN Family Suite Offering Reports

Navigate to the Reports section in Offering.

The screenshot shows the ParishSOFT CN Family Suite interface. The top navigation bar includes "Home", "Family Directory", "Religious Ed.", "Offering" (highlighted with a yellow box labeled 1), "Ministry Scheduler", "IQ", and "Administration". Below this is a sub-navigation bar with "Funds", "Batches", "Pledges", "Posting", "Contribution List", "Online Giving", "Giving History", "Import", and "Reports" (highlighted with a yellow box labeled 2). The main content area is titled "Offering Reports" and shows a list of funds. On the left, there is a "Select Report" section with a table of categories and reports. The "Contributions" category is highlighted with a yellow box labeled 3, and the "Statements" report is highlighted with a yellow box labeled 4. The "Fund" tab is selected in the top navigation, and the "CFSA 2016" fund is selected in the list, highlighted with a yellow box labeled 5. The list of funds includes "CFSA", "CFSA 2010", "CFSA 2011", "CFSA 2012", "CFSA 2014", "CFSA 2015", "CFSA 2016", and "CFSA-2004".

Category	Report
Audit	E-Statements
Batches	Postings
Contributions	Statements
Pledges	Summary

Description	Fund #
CFSA	4280a
CFSA 2010	4280b
CFSA 2011	4280a11
CFSA 2012	4280a12
CFSA 2014	4293-2014
CFSA 2015	9001-2015
CFSA 2016	9001-2016
CFSA-2004	4280a

1. Offering
2. Reports
3. Contributions
4. Statements
5. Select Fund

Click Next

Fund Filters Template Givers

**Contribution Dates**

1/1/2016 1 12/31/2016

**Type of Report**

☐ Summary

☒ Detail

**Report Content**

☒ Family 2

☐ Member

**Givers**

☒ Show filtered givers 3

☐ Show all

☐ Show all except filtered givers

☐ Show non-givers

**Membership Filters**

Family Registration: Registered 4

Family Group: Active

Family Workgroups: All Groups

Member Workgroups: All Groups

**Electronic Statements**

☒ Include givers who have opened electronic statements

**Total Given**

Minimum: \$ 0.00

Maximum: \$ 0.00 5

☒ Include \$0 Contributions

☐ Include Member Contributions

◀ Previous Next ▶

1. Enter Date Range
2. Select Family, if you enter Member Contributions, you will need to verify those in a separate report.
3. Show filtered givers
4. Grab Registered and Active records only
5. Check box include \$0 Contributions

Click Next

Fund Filters **Template** Givers

**Statement Dates**

Statement Date ⓘ 1













4/8/2016

**Body of Statement**

Include a customized message in your statements. You may create a new message template by choosing (New Template) or edit an existing template. Template is limited to 1500 characters.

zero giver report 2

zero giver report

Arial 3 (Font Size) **B I U**            

You letter content goes here.

|

**Signature**

Add a signature to your statements.

(None) 4

5

Previous Next

You may generate a letter here or skip to the next step to generate Labels.

If you wish to customize a letter:

1. Enter date for the letter.
2. Give your letter a name.
3. Enter your letter contents.
4. Add pastor signature if you wish.
5. Click Next.

Fund Filters Template **Givers**

<input type="checkbox"/>	1 y Name	Primary Address	Env #	# of Funds
<input type="checkbox"/>				
<input type="checkbox"/>	Apenson, Dennis and			
<input type="checkbox"/>	Li			
<input type="checkbox"/>	Aa			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Ac			
<input type="checkbox"/>	Ae			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			
<input type="checkbox"/>	Al			

Page 1 of 170 (1698 Records) < 1 2 3 4 5 ... 169 170 >

Print Labels 2 < Previous View Statements 3

1. Check the box to Select ALL families
2. Click on the Print Labels button to pop up labels for all persons in your list.
3. Click View Statements to see the letter with details for the selected fund.

**Be sure to pull out anyone that returned a pledge card but indicated they could not give at this time. If you have followed previous procedures, these families should have the Start Date of the pledge changed from the date the zero pledge record was added to the date the returned pledge card was received.**

**ConnectNow** Family Suite

Home Family Directory Religious Ed. **Offering** Ministry Scheduler IQ Admin

Funds Batches **Pledges** Posting Contribution List Online Giving Giving History

**Pledge Management**

Fund: CPSA 2016 Family Status: Registered Family Group: Active Pledge Type: Family View Pledges

10 records 1 Sign Add \$0 Pledges Delete Pledge(s)

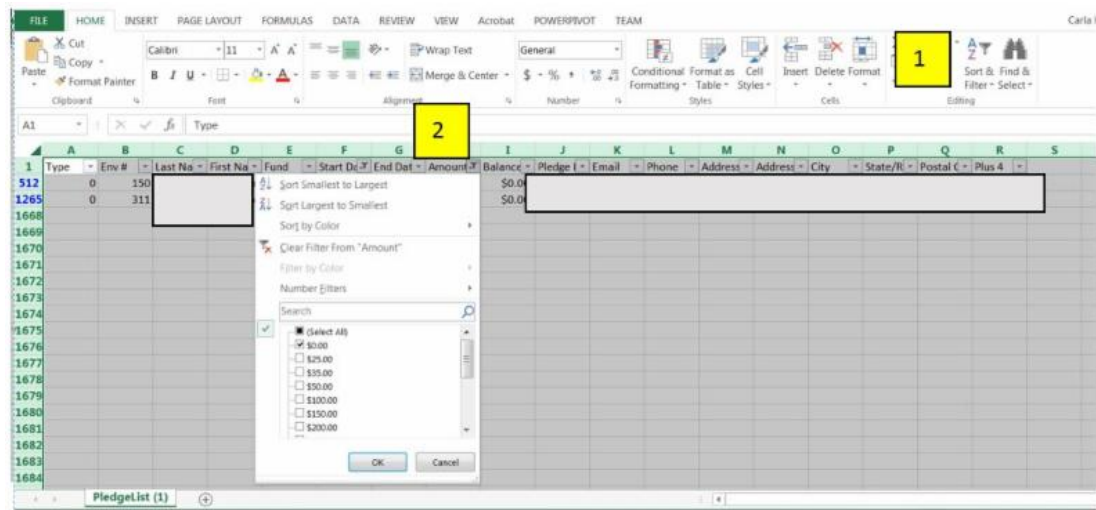
A C	Type	Env #	First Name	Fund	Start Date	End Date	Amount
<input type="checkbox"/>		1813	Reeder, Matt and Chanda	CPSA 2016	3/31/2016		\$1,503.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00
<input type="checkbox"/>							0.00

Page 1 of 167 (1666 Records) 1 2 3 4 5 6 7 ... 165 166 167

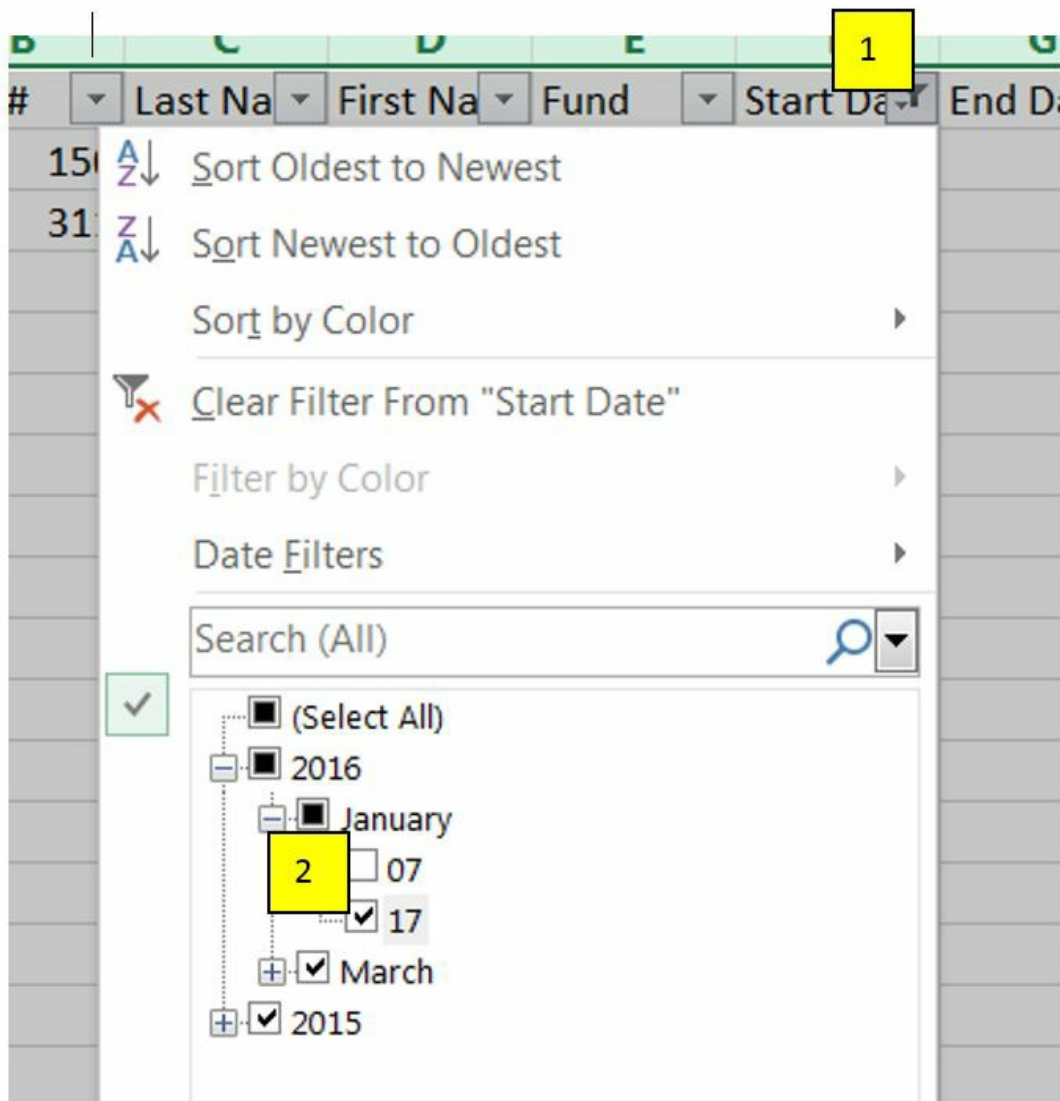
PledgeList (1) Show all downloads

Navigate to Offering, Pledges, Select CFSA 2016, Registered and Active and click View Pledges.

1. Click on the Export icon to send the resulting pledge records to an excel sheet.
2. If using Chrome as your browser, the file will pop up in the bottom left hand corner of your screen. Double click on this file to open it in Excel.



1. Select the entire worksheet and click on the Filter icon to filter records. A small box and triangle will appear at the top of each column.
2. Click on the triangle after the Amount column. Uncheck all amounts and leave zero amount selected as shown.



1. Select the Start Date triangle.
2. Uncheck the date you added zero pledge records

**The remaining records should be pulled from your letters / labels as they have returned a zero pledge card and should NOT receive a follow up letter.**

Thank you for taking time to read this newsletter. Please email or call with ANY Questions!

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STAY CONNECTED:

