

EOY Best Practices

Taking the trepidation out of your end of year

Ryan Schreiber - ParishSOFT

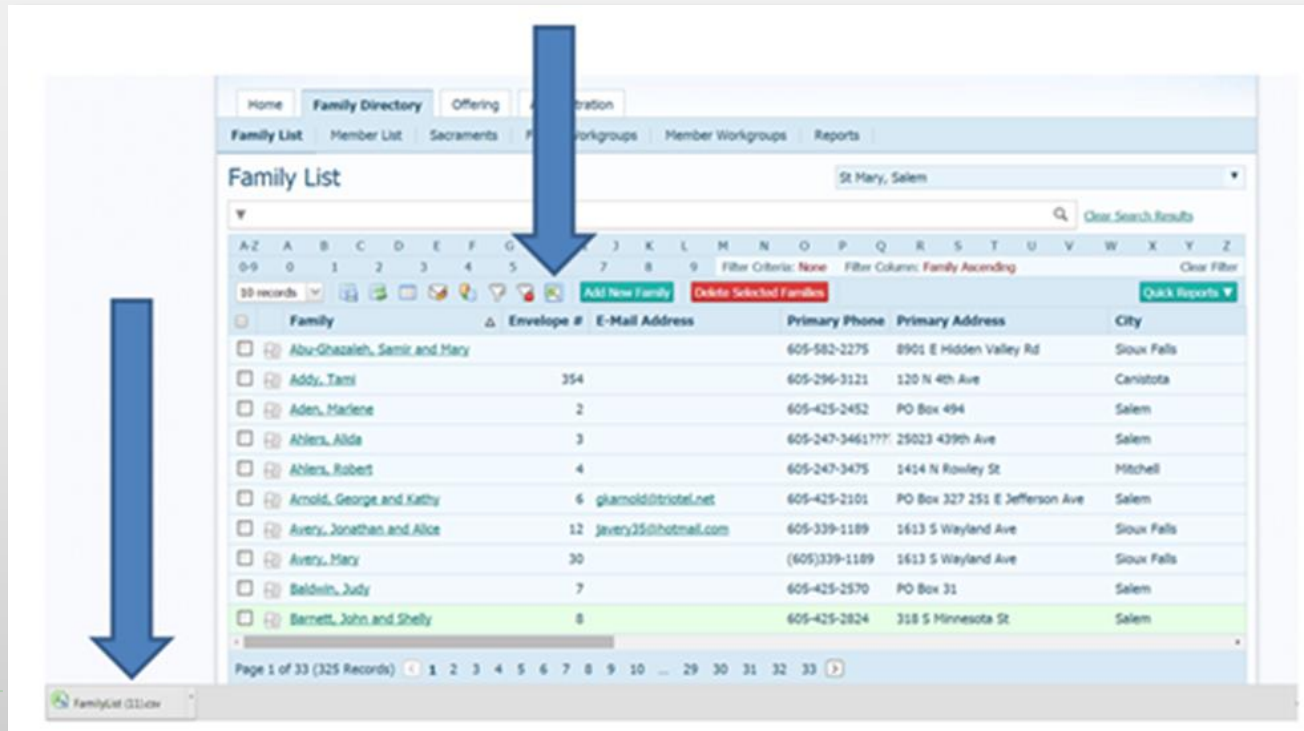
What steps do I take?

- ▶ Audit family names and addresses
- ▶ Review fund names and settings
- ▶ Make sure all tax-deductible contributions are posted to the correct calendar year
- ▶ Customize the design of your statement (optional)
- ▶ Generate your statements
- ▶ Print or post electronically



Auditing family data

- ▶ Click on the Export to CSV icon
- ▶ Notice the file downloaded to the lower left corner of your screen
- ▶ Click on link to open the file in Excel



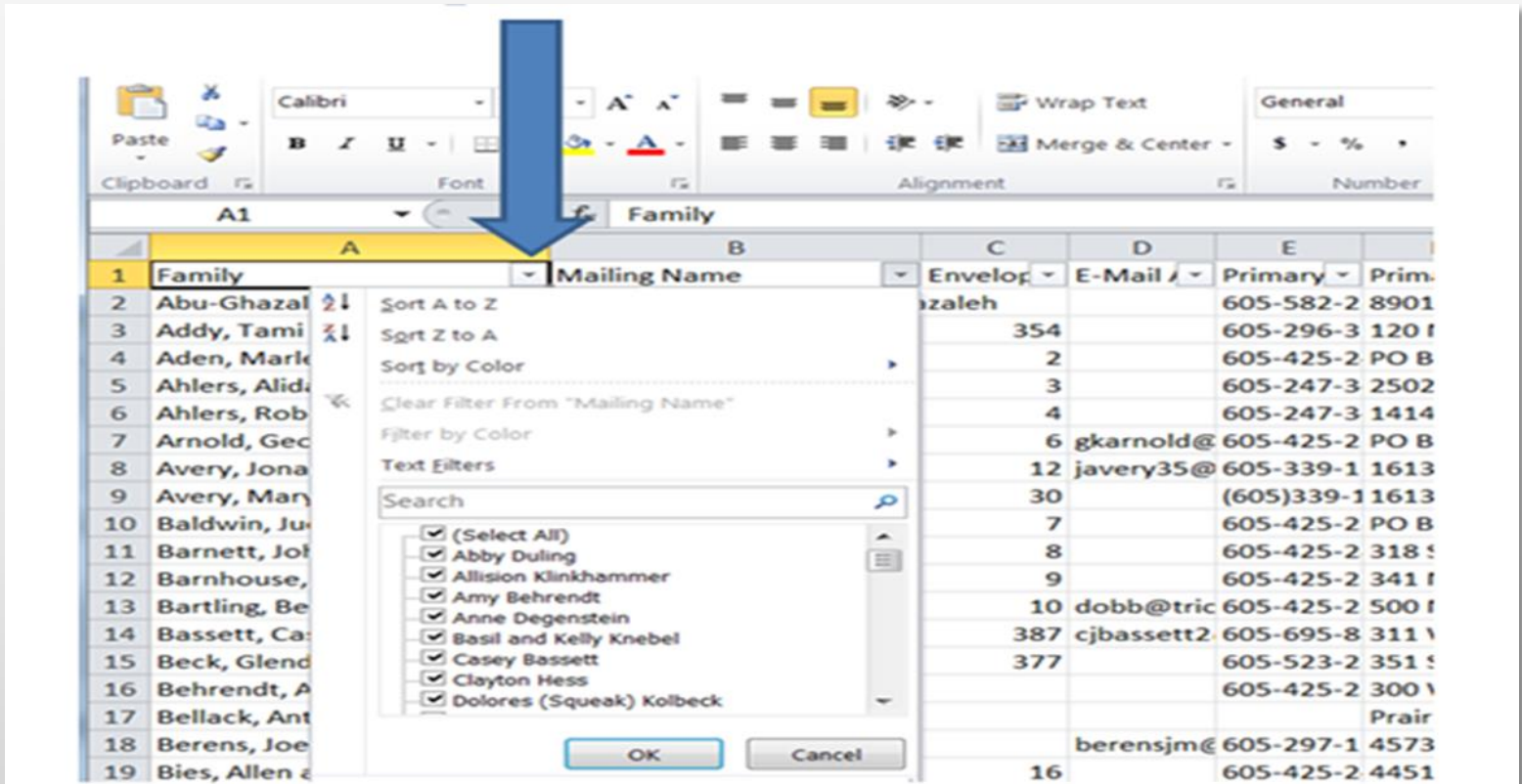
The screenshot shows the 'Family List' interface. A large blue arrow points to the 'Export to CSV' icon (a green square with a white document and download symbol) in the toolbar. Another large blue arrow points to the 'FamilyList (31).csv' file icon in the bottom-left corner of the browser window. The table below shows a list of families with columns for Family, Envelope #, E-Mail Address, Primary Phone, Primary Address, and City.

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
Abu-Ghazaleh, Samir and Mary			605-582-2275	8901 E Hidden Valley Rd	Sioux Falls
Addy, Tami	354		605-296-3121	120 N 4th Ave	Canistota
Aden, Marlene	2		605-425-2452	PO Box 494	Salem
Ablers, Alida	3		605-247-3461	25023 439th Ave	Salem
Ablers, Robert	4		605-247-3475	1414 N Rowley St	Mitchell
Arnold, George and Kathy	6	gkarnold@tristat.net	605-425-2101	PO Box 327 251 E Jefferson Ave	Salem
Avery, Jonathan and Alice	12	javery35@hotmail.com	605-339-1189	1613 S Wayland Ave	Sioux Falls
Avery, Mary	30		(605)339-1189	1613 S Wayland Ave	Sioux Falls
Baldwin, Judy	7		605-425-2570	PO Box 31	Salem
Barnett, John and Shelly	8		605-425-2824	318 S Minnesota St	Salem

Page 1 of 33 (325 Records)

Auditing family data

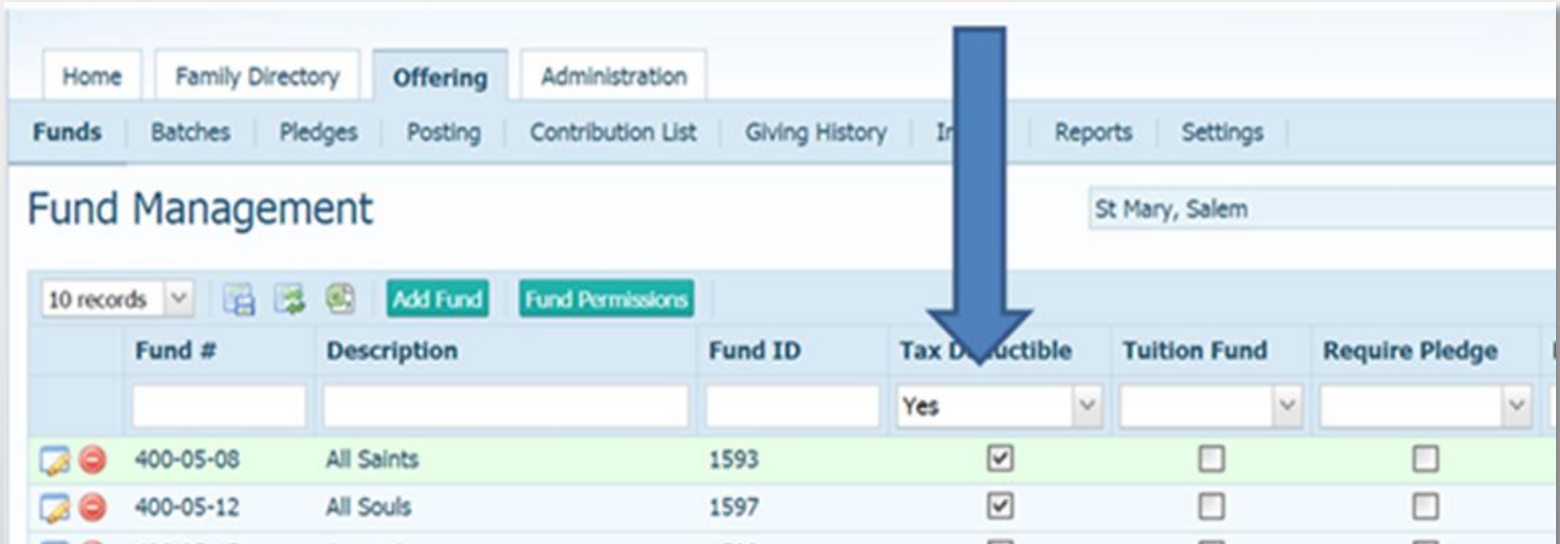
- ▶ Review and correct any blanks for Mailing Name, Primary Address, City, State/Region, Postal Code



	A	B	C	D	E	F
1	Family	Mailing Name	Envelop	E-Mail	Primary	Prim
2	Abu-Ghazal		354		605-582-2	8901
3	Addy, Tami		2		605-296-3	120 f
4	Aden, Marle		3		605-425-2	PO B
5	Ahlers, Alida		4		605-247-3	2502
6	Ahlers, Rob		6	gkarnold@	605-425-2	PO B
7	Arnold, Gec		12	javery35@	605-339-1	1613
8	Avery, Jona		30	(605)339-1	1613	
9	Avery, Mary		7		605-425-2	PO B
10	Baldwin, Ju		8		605-425-2	318 s
11	Barnett, Joh		9		605-425-2	341 f
12	Barnhouse,		10	dobb@tric	605-425-2	500 f
13	Bartling, Be		387	cjbassett2	605-695-8	311 v
14	Bassett, Ca		377		605-523-2	351 s
15	Beck, Glend				605-425-2	300 v
16	Behrendt, A					Prair
17	Bellack, Ant			berensjm@	605-297-1	4573
18	Berens, Joe		16		605-425-2	4451
19	Bies, Allen					

Auditing Fund data

- ▶ Only Funds that have Tax Deductible checked should be included in your Statement. Review these funds for spelling errors and accuracy in the Tax Deductible field
- ▶ Funds, Filter on Tax Deductible=Yes



Home Family Directory **Offering** Administration


Funds Batches Pledges Posting Contribution List Giving History In Reports Settings

Fund Management St Mary, Salem

10 records Add Fund Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge
			Yes		
400-05-08	All Saints	1593	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
400-05-12	All Souls	1597	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Statement generation


Family Suite

[HELP](#) - [CONTACT](#) - [HOME](#) - [SIGN IN](#)

[Our Lady of the Ledger, Saint Petersburg](#)
cdandaraw600 (Christine Dandaraw)

[Home](#) | [Family Directory](#) | [Faith Formation](#) | **[Offering](#)** | [Ministry Scheduler](#) | [Tuition](#) | [IQ](#) | [Administration](#)

[Funds](#) | [Batches](#) | [Pledges](#) | [Posting](#) | [Contribution List](#) | [Giving History](#) | [Import](#) | **[Reports](#)**

Offering Reports

Our Lady of the Ledger, Saint Petersburg

Select Report

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

Fund Filters Template Givers

<input checked="" type="checkbox"/>	Description	Fund #
<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	Christmas	400-20
<input checked="" type="checkbox"/>	Church Maintenance	900-02
<input checked="" type="checkbox"/>	Offertory	400-01
<input checked="" type="checkbox"/>	Pilgrimage Fund	900-01

* All funds listed are tax-deductible

Statement generation

- ▶ Select ALL Funds by checking the box next to Description
- ▶ Only Tax Deductible funds will be listed
- ▶ A pop up message will appear to select subsequent pages of funds
- ▶ Click NEXT

Fund Filters Template Givers



All 10 records on this page are selected. [Select all 156 records](#)

<input checked="" type="checkbox"/>	Description	Fund #
<input checked="" type="checkbox"/>	2006 Support	4110
<input checked="" type="checkbox"/>	2007 Support	2007 Support
<input checked="" type="checkbox"/>	2008 Support	4110
<input checked="" type="checkbox"/>	2009 Support	2009support

Statement generation

- ▶ Contribution Date range should be entire year

Contribution Dates

1/1/2016  to 12/31/2016 

Statement generation

- ▶ Detail statements are required by IRS (date and amount need to be reported)
- ▶ Usually posting is done by Family, if you have some Member level postings, you will need to generate statements selecting Member also

Type of Report

- ☐ Summary
- ☒ Detail

Report Content

- ☒ Family
- ☐ Member

Statement generation

- ▶ For Amounts, you may enter a minimum, but not a maximum!
- ▶ Be sure to uncheck Include \$0 Contributions

Offering Reports Little Flower, Ann Arbor

Select Report

Category	Report
Audit	Postings
Batches	Statements
Contributions	Summary
Pledges	Tax Receipts

Family Detail Statements

Funds Selected 67 of 67	Statement Date 8/2/2016
Givers Selected 10 of 1506	Contribution Dates 1/1/16 - 12/31/16
Registration Status Registered	Total Given \$ - \$

Options

Report Format

☒ Detailed
☐ Summary

Delivery Format

☐ Paper Statements
☒ Electronic Statements

Sorting

Contributions:
Date Ascending

Filters

Dates

1/1/2016 to 12/31/2016

Amount

Minimum: \$
Maximum: \$
☒ Include \$0 Contributions

Membership

Family Registration: Registered
Family Group: Active
Family Workgroups: All Groups
Member Workgroups: All Groups

Contribution Source

☒ Family
☐ Member
☒ Include Member Contributions in Family Statements

Givers

☒ Show filtered givers
☐ Show all
☐ Show all except filtered givers
☐ Show non-givers

Electronic Statements

☒ Include givers who have opened electronic statements

[Previous](#) [Next](#)

Statement generation

► Membership Filters

- Many organizations choose to run different sets or letters for Registered vs Unregistered families. All groups should be selected.



Membership Filters

Family Registration: Both

Family Group: All Groups

Family Workgroups: All Groups

Member Workgroups: All Groups

Electronic Statements

☐ Include givers who have opened electronic statements

Statement generation

- ▶ Membership Filters
 - ▶ You may subset your letters in workgroups
 - ▶ Keep in mind that if a person is NOT in a workgroup, they will NOT receive a statement

Membership Filters

Family Registration:	Registered	▼
Family Group:	All Groups	▼
Family Workgroups:	All Groups	▼
Member Workgroups:	All Groups	▼

Statement generation

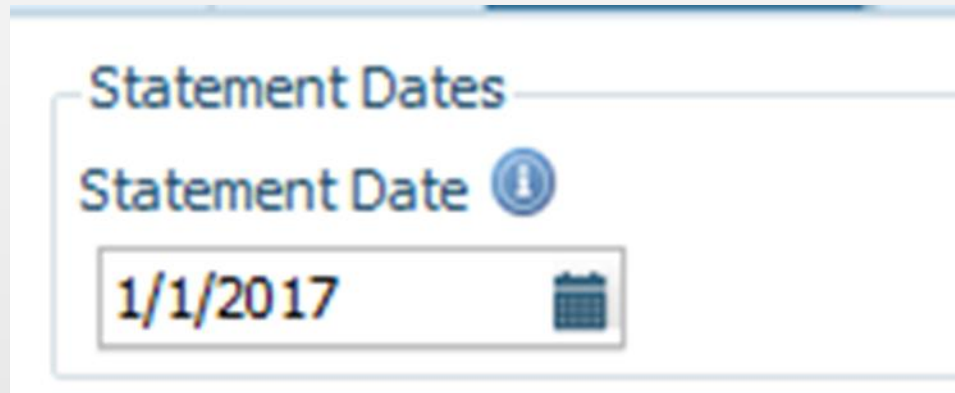
- ▶ Givers may be displayed as below
- ▶ Show filtered givers will match your Membership Filters
- ▶ Click Next

Givers

- ☒ Show filtered givers
- ☐ Show all
- ☐ Show all except filtered givers

Statement generation

- ▶ Statement Date will print on the letter



Statement Dates

Statement Date ⓘ

1/1/2017 ⓘ

The screenshot shows a software window titled "Statement Dates". Inside, there is a label "Statement Date" followed by an information icon (a circle with an exclamation mark). Below this is a text input field containing the date "1/1/2017", with a calendar icon to its right.

Statement generation

- ▶ Body of Statement enables you to create a new template or grab an existing template

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.

(None) ▼

- (None)
- (New Template...)
- eoyletter
- progresscontribreport
- 2014nondeductpreview
- zero giver report


◀ Previous N





Statement generation

- ▶ Type the contents of your statement in the text box
- ▶ After complete, be sure to give it a name and click the Save icon
- ▶ Select this letter from drop down box

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.

(New Template...) ▼

New 

Arial ▼ (Font Size) ▼ | **B** *I* U |     | **A** ▼

testing |

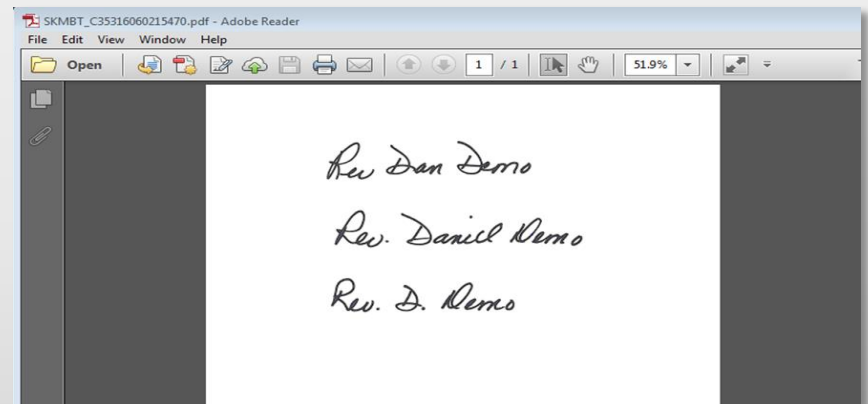
Statement generation

- ▶ The pastor signature may be uploaded to print on this statement
- ▶ Have the pastor sign a sheet of paper and scan it as a PDF document
- ▶ Using your snipping tool, select the best signature and save as a .jpg file

Signature

The signature associated with your prints.

(None) ▼



Rev. Daniel Demo

Givers

- ▶ Pop-up Blocker... be sure enable pop-ups for all of the ParishSOFT site!
- ▶ The total number of records appears at the bottom. You may check the box to view a record.

Fund > Filters > Template > Givers				
<input type="checkbox"/>	Family Name	Primary Address	Env #	# of Fund
<input type="checkbox"/>				
<input type="checkbox"/>	Abell, Joseph and Joanie	1403 N Chapelcross Loop	30	
<input type="checkbox"/>	Alcorn, Harry	9000 US Hwy 192 # 480	12	
<input type="checkbox"/>	Alindogan, Elizabeth	10619 Lithia Estates Dr	43	
<input type="checkbox"/>	Andrews, Herb	10436 S Kirkham Ter	4	
<input type="checkbox"/>	Campbell, Drew	202 Stahls Way		
<input type="checkbox"/>	Campusano, Maria	6271 Osprey Lake Cir	26	
<input type="checkbox"/>	Cassia and Lopez, John and Mary	5535 20th Ave N	1	
<input type="checkbox"/>	Dillon, Bridget	2293 Cumberland Circle #602		
<input type="checkbox"/>	Lockheed and Smith-Lockheed, John and Rebecca	6363 9th Ave N	11	
<input type="checkbox"/>	Loose, Cash	1203 N Nebraska Ave		
Page 1 of 3 (22 Records) < 1 2 3 >				
Print Labels				
< Previous				

Selecting Givers

- ▶ To issue all statements click the box to the left of Family Name
- ▶ To issue a single statement click the box to the left of the name

Fund
Filters
Template
Givers

<input type="checkbox"/> Family Name	Primary Address	Env #	# of Funds
<input type="checkbox"/>			
<input type="checkbox"/> Abell, Joseph and Joanie	1403 N Chapelcross Loop	30	
<input type="checkbox"/> Andrews, Herb	10436 S Kirkham Ter	4	
<input type="checkbox"/> Cassia and Lopez, John and Mary	5535 20th Ave N	1	
<input type="checkbox"/> Lockheed and Smith-Lockheed, John and Rebecca	6363 9th Ave N	11	
<input type="checkbox"/> Putman, John and Mary	125 E Orange	2	
<input type="checkbox"/> Quinterero and Lopez-Quinterero, John and Rebecca	6363 9th Ave N	13	
<input type="checkbox"/> Zaloga, Maureen	461 Centerwood Dr	113	

Print Labels
Previous
View Statements

Options & Details

- Criteria for statements is displayed in the bottom left hand corner

Family Detail Statements	
Funds Selected 7 of 7	Statement Date 1/1/2017
Givers Selected 22 of 22	Contribution Dates 1/1/16 - 12/31/16
Registration Status Both	Total Given \$5.00 - \$1000000

View Statements

- ▶ Check the box next to a giver, click View Statements to see in PDF format

Fund
Filters
Template
Givers

<input type="checkbox"/>	Family Name	Primary Address	Env #	# of Funds
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Abell, Joseph and Joanie	1403 N Chapelcross Loop	30	
<input type="checkbox"/>	Alcorn, Harry	9000 US Hwy 192 # 480	12	
<input type="checkbox"/>	Alindogan, Elizabeth	10619 Lithia Estates Dr	43	
<input type="checkbox"/>	Andrews, Herb	10436 S Kirkham Ter	4	
<input type="checkbox"/>	Campbell, Drew	202 Stahls Way		
<input type="checkbox"/>	Campusano, Maria	6271 Osprey Lake Cir	26	
<input type="checkbox"/>	Cassia and Lopez, John and Mary	5535 20th Ave N	1	
<input type="checkbox"/>	Dillon, Bridget	2293 Cumberland Circle #602		
<input type="checkbox"/>	Lockheed and Smith- Lockheed, John and Rebecca	6363 9th Ave N	11	
<input type="checkbox"/>	Loose, Cash	1203 N Nebraska Ave		

Page 1 of 3 (22 Records)
< 1 2 3 >

Print Labels
Previous
View Statements

View ALL Statements

- ▶ Check the box Directly to the left of Family Name
- ▶ Click the Select All Records link to view all

Fund > Filters > Template > Givers			
All 10 records on this page are selected Select all 22 records			
<input checked="" type="checkbox"/>	Family Name	Primary Address	Env #
<input checked="" type="checkbox"/>	Abell, Joseph and Joanie	1403 N Chapelcross Loop	30
<input checked="" type="checkbox"/>	Alcorn, Harry	9000 US Hwy 192 # 480	12
<input checked="" type="checkbox"/>	Alindogan, Elizabeth	10619 Lithia Estates Dr	43
<input checked="" type="checkbox"/>	Andrews, Herb	10436 S Kirkham Ter	4
<input checked="" type="checkbox"/>	Campbell, Drew	202 Stahls Way	
<input checked="" type="checkbox"/>	Campusano, Maria	6271 Osprey Lake Cir	26
<input checked="" type="checkbox"/>	Cassia and Lopez, John and Mary	5535 20th Ave N	1
<input checked="" type="checkbox"/>	Dillon, Bridget	2293 Cumberland Circle #602	
<input checked="" type="checkbox"/>	Lockheed and Smith-Lockheed, John and Rebecca	6363 9th Ave N	11
<input checked="" type="checkbox"/>	Loose, Cash	1203 N Nebraska Ave	
Page 1 of 3 (22 Records) < 1 2 3 >			

Statement example

- ▶ Addresses are formatted to fit in a number 10 window envelope
- ▶ Details of transactions are the IRS required tax receipt

Our Lady of the Ledger
PO Box 42200
Saint Petersburg, FL 33743
(727) 344-1611
training@dosp.org

Statement date: 01/01/2016
ID # 137827

Mr. Joseph Abell Jr. and Mrs. Joan Smith-Abell
1403 N Chapelcross Loop
Crystal River, FL 34429

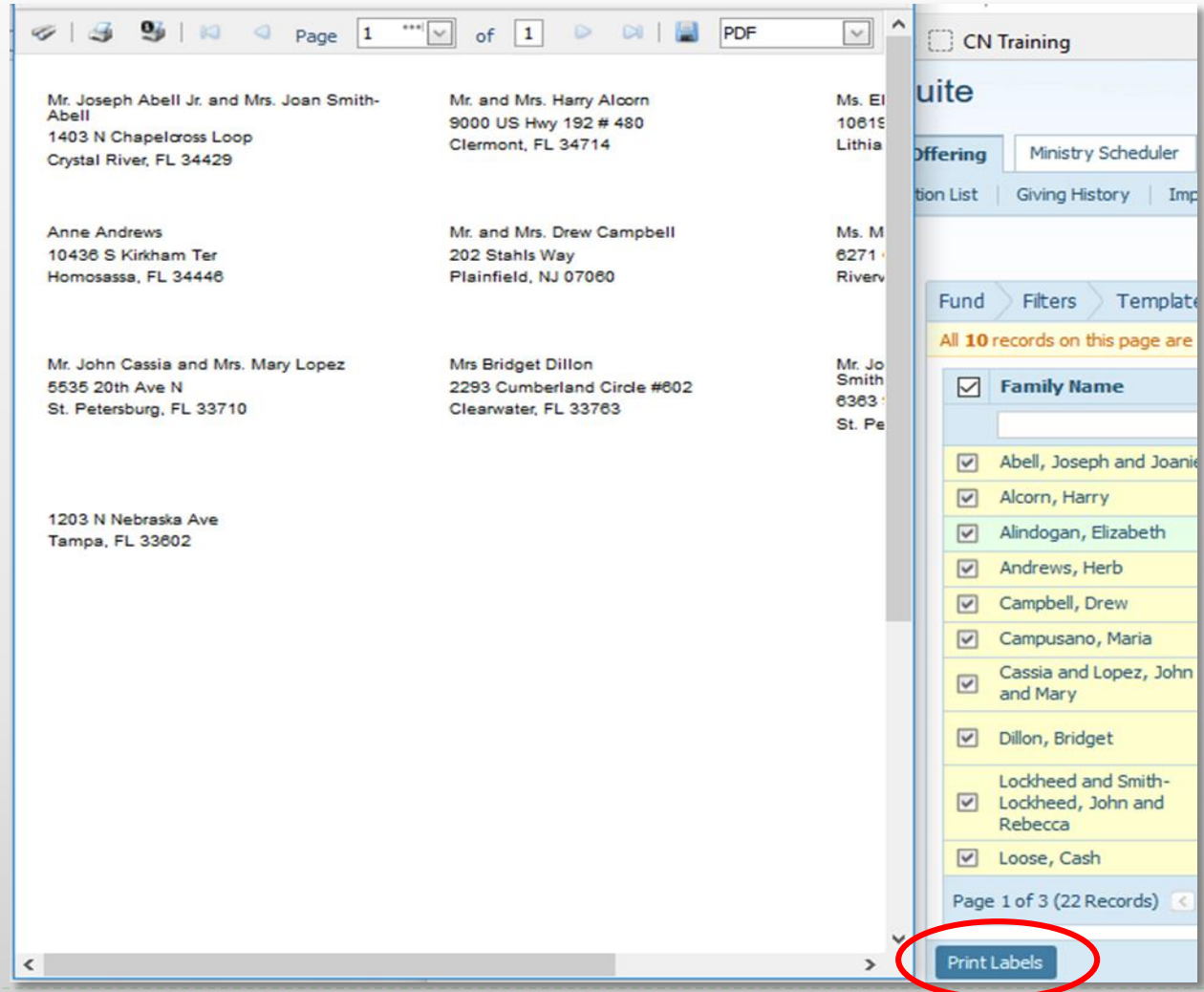
Family Contributions - Detail
Period 01/01/2016 - 12/31/2016

Total Contributions: \$37.00
Period 01/01/2016 - 12/31/2016

Date	Check #	Amount	Fund
01/18/16	4856	\$20.00	Offertory
01/11/16	365	\$5.00	Church Maintenance
01/10/16	123	\$10.00	Offertory
01/10/16		\$2.00	Offertory

Labels

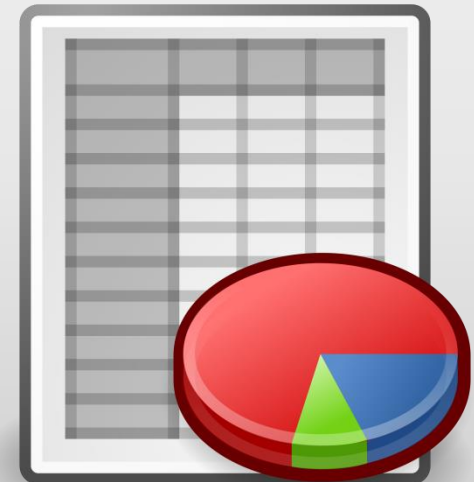
- ▶ You may choose to print labels by clicking **Print Labels**
- ▶ Order of the labels will be Last Name, First Name



The screenshot displays the P.A.C.E. software interface. On the left, a list of family names and addresses is shown, including Mr. Joseph Abell Jr. and Mrs. Joan Smith-Abell, Anne Andrews, Mr. John Cassia and Mrs. Mary Lopez, and 1203 N Nebraska Ave. On the right, a sidebar contains a 'Print Labels' button, which is circled in red. The sidebar also shows a 'Family Name' filter and a list of names with checkboxes, including Abell, Joseph and Joanie, Alcorn, Harry, Alindogan, Elizabeth, Andrews, Herb, Campbell, Drew, Campusano, Maria, Cassia and Lopez, John and Mary, Dillon, Bridget, Lockheed and Smith-Lockheed, John and Rebecca, and Loose, Cash. The bottom of the sidebar indicates 'Page 1 of 3 (22 Records)'.

Electronic Statements


- ▶ Requires My Own Church to be up and running
- ▶ Makes End of Year Statement available in the individual's Family Giving tab of My Own Church
- ▶ Makes \$\$\$\$\$\$ and ~~cccccc~~ saving the parish money!
- ▶ Separate workshop available on electronic statements – document available on website



EOY additional resources


Help.parishsoft.com/eoy/cn-family-suite.htm

CONTACT SUPPORT



FAMILY SUITE

End-of-Year Resources



EOY Webinar

Our recorded webinar on ConnectNow Family Suite End-of-Year (EOY) processing walks you through the steps you'll need to get accurate contribution statements to your donors. This session also covers how to generate electronic contribution statements and deliver them to your donors via My Own Church.

[Watch the Webinar >>](#)

Training

Get maximum productivity and efficiency available from your software.

With our virtual classroom and video courses, it's easy for your veteran (and new) staff members to learn

Checklist

Before running your End-of-Year (EOY) contributions statements, it's important to do some advanced preparation to ensure that your statements and your mailing information are accurate and complete. This checklist outlines the steps you'll want to complete for your EOY processing. Step-by-step instructions are available in both the [ConnectNow online help for EOY](#) and in the video below.

1. [Audit family names and addresses.](#)
2. [Review fund names and settings for accuracy.](#)
3. [Make sure all tax-deductible contributions are posted to the correct calendar year.](#)
4. [Optional: Create a signature image to insert into your statements.](#)
5. [Print your statements if you're ready now.](#)

Electronic Statements

Electronic contribution statements are a **new** addition to ConnectNow Family Suite's Offering and Pledges program. They're simple to create and deliver to your donors.

1. [Details about Electronic Statements](#)
2. [Video: Generating Electronic Statements](#)
3. [Video: Retrieving Electronic Statements](#)

Video: Creating Printed Statements

This video will walk you through the checklist steps needed to process year-end (outlined above). From simple audits to printing donor tax statements, you'll learn how to get accurate Contribution Statements and have them delivered to the correct place the first time.

High-speed Internet is required.

Questions



Thank you!

Ryan Schreiber
ParishSOFT