

## Total CSA Payments Are Higher Than Pledge

If you receive an error that a person's payments have exceeded their original pledge amount, please follow these instructions.

**Both examples** assume a donor is setup with a \$200 pledge and we want to change that to \$250.

**First Option** – This option splits the new total pledge amount into two parts. The original pledge remains. The additional payment becomes a CSA One-Time payment and represents how much over the pledge they actually paid.

1. Open Church Office.
2. Click the **Information** page on the Ribbon Bar.
3. Click **Contributions** in the Data Screens section.
4. Use the **Navigation** section to locate the family by name or ID.
5. Click the **Funds Used** button and select the CSA fund.
6. Click the **Rate/History/Keywords** link in the Data Entry Section.
7. Click the entry showing the \$250 payment.
8. Change the \$250 to \$200.
9. Click the **Insert** button.
10. Enter the same date.
11. Select **CSA One-Time Payment**.
12. Enter \$50 as the amount (difference between pledge and actual over payment).
13. Click **Recap Totals** link in the Data Entry section.
14. Verify total due shows \$250 now.

**Alternative Option** - Increase the pledge to match the overpayment.

1. Open Church Office.
2. Click the **Information** page on the Ribbon Bar.
3. Click **Contributions** in the Data Screens section.
4. Use the **Navigation** section to locate the family by name or ID.
5. Click the **Funds Used** button and select the CSA fund.
6. Click **Recap Totals** link in the Data Entry section. Verify total due shows \$200.
7. Click **Rate/History/Keywords** link in the Data Entry Section.
8. If the **Show Rates** button is visible, click it to display the Terms/Rates, otherwise skip to the next step.
9. Verify rate and totals shows \$200.
10. **Highlight \$200 in terms. – Change terms to Total**
11. Press backspace key to delete.
12. **Enter \$250 in terms. – Change terms to Total**
13. Click **Save** button. The program will warn you that **rate (change to total)** of \$250 doesn't match **total (change to rate)** of \$200.
14. **Click the button to Change the Total. – Change to: Click the button to Change the Rate**
15. Click **Recap Totals** link in the Data Entry section.
16. Verify total due shows \$250 now.

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**First Option** – This option splits the new total pledge amount into two parts. The original pledge remains. The additional payment becomes a CSA One-Time payment and represents how much over the pledge they actually paid.

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2. Click the **Information** page on the Ribbon Bar.
3. Click **Contributions** in the Data Screens section.
4. Use the **Navigation** section to locate the family by name or ID.
5. Click the **Funds Used** button and select the CSA fund.
6. Click the **Rate/History/Keywords** link in the Data Entry Section.
7. Click the entry showing the \$250 payment.
8. Change the \$250 to \$200.
9. Click the **Insert** button.
10. Enter the same date.
11. Select **CSA One-Time Payment**.
12. Enter \$50 as the amount (difference between pledge and actual over payment).
13. Click **Recap Totals** link in the Data Entry section.
14. Verify total due shows \$250 now.

**Alternative Option** - Increase the pledge to match the overpayment.

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2. Click the **Information** page on the Ribbon Bar.
3. Click **Contributions** in the Data Screens section.
4. Use the **Navigation** section to locate the family by name or ID.
5. Click the **Funds Used** button and select the CSA fund.
6. Click **Recap Totals** link in the Data Entry section. Verify total due shows \$200.
7. Click **Rate/History/Keywords** link in the Data Entry Section.
8. If the **Show Rates** button is visible, click it to display the Terms/Rates, otherwise skip to the next step.
9. Verify rate and totals shows \$200.
10. **Highlight \$200 in terms. – Change terms to Total**
11. Press backspace key to delete.
12. **Enter \$250 in terms. – Change terms to Total**
13. Click **Save** button. The program will warn you that **rate (change to total)** of \$250 doesn't match **total (change to rate)** of \$200.
14. **Click the button to Change the Total. – Change to: Click the button to Change the Rate**
15. Click **Recap Totals** link in the Data Entry section.
16. Verify total due shows \$250 now.