Family and Financial Synchronization Instructions

Submission Deadlines

March 23, 2022	**August 17, 2022**
April 20, 2022	**September 14, 2022**
May 18, 2022	**October 12, 2022**
June 15, 2022	**November 9, 2022**
July 20, 2022	**December 7, 2022**

January 25, 2023 Final 2022 CSA Sync Due

1. **Download any available program updates.** This must be done before ANY financial synchronization (Sync).

   Note: Parishes who access Church Office online through PDS' "On-Demand" system do NOT have to update their software. This is done automatically.

   a. Open Church Office. In a network environment, open Church Office on the server FIRST."

   b. On the top-left corner, click **File**.

   c. Choose **Check for Program Update**.

   d. Verify your E-mail address and click **Check**.

   e. If a Church Office update is available for download, click **Yes** to allow the program to download and install it.

   f. Click **OK** to restart the workstation when requested by the software.

   g. The update will install itself and restart Church Office.
   If you are in a network environment, after the first workstation has restarted Church Office, other workstations on the network will see a prompt the next time they restart the program. They simply need to click Yes to apply the update.

2. **If you don't plan to synchronize financial data skip to step 3.**
   If you plan to synchronize financial data for the CSA, print the Pledge Drive Status Report

   a. Click on **Contributions** on the **Information** ribbon after the Sync has finished.

   b. Click on **Reports** in the **Other Tasks** section.

   c. Click on the triangle next to **Listing Reports** until it turns black**.**

   d. Double click on **Pledge Drive Status Report.** Do not use the version marked (faster).

   e. Click the **Next** button three times.

   The Select Funds to Print screen will appear.

   f. The **Date Range To Print** should read **2/1/2022** to **1/31/2023.**

   g. The **Funds To Print** should be the fund number for your **CSA 2022** fund.

   h. **Print overpayments As** should be set to "Zero ($0.00) for the Balance Due"

   i. Click **Next**

j. You should ALWAYS check the following boxes
   - Skip families that do not have any selected funds
   - Include family marked as loose collections
   - Include active families
   - Include inactive families
k. Click the **Preview Report** button**.**
l. Click the **Last Page** button**.**
m. Click the **Print** button.
n. Put a dot next to **Current Page** in the Page Range section.
o. Click **OK**.
p. Click the **Close** button.

3. Run the Data Sync

a. Click on **Data Sync**.
b. Click on **Sync with Diocese**.

4. **Identify the Set of Families in the Church**

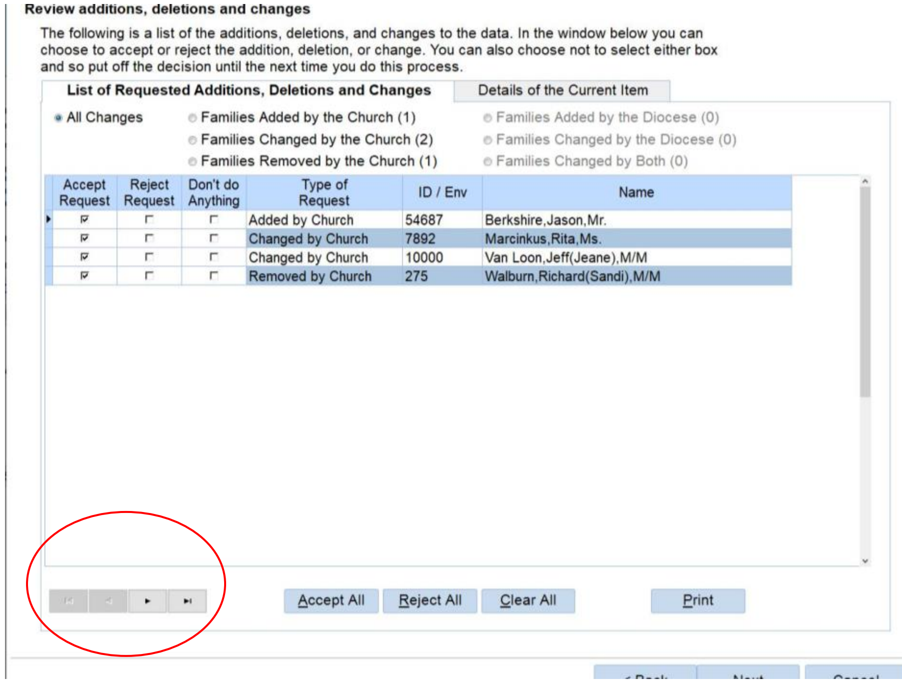
a. Click on the **Families Selection** tab.
b. Check mark the following boxes
   - Only include families with the "Synchronize with Diocese" Checkbox Marked
   - Include Active Families
   - Include Inactive Families
c. Click **Next**.

5. Check for additions deletions and changes.

a. Use the navigation control at the bottom of the screen (circled in red on the image below) to display other records.
b. Note: If at any time, you see the message "no additions, deletions or changes but financial data must still be synchronized." This fine. Click **OK**.
a. If you get a pop-up error warning that you're deleting a large group of parishioners or if you see a large group of parishioners listed under the "Families Remove by the Church" screen, **stop** and contact Julia Cooney (jcooney@cfnwpa.org or 814-824-1253).

The **Review Additions, Changes, and Deletions** screen allows you to review all information being sent to the diocese. At the top of the screen are several radio buttons allowing you to filter what is displayed in the list. You can limit the list to just:

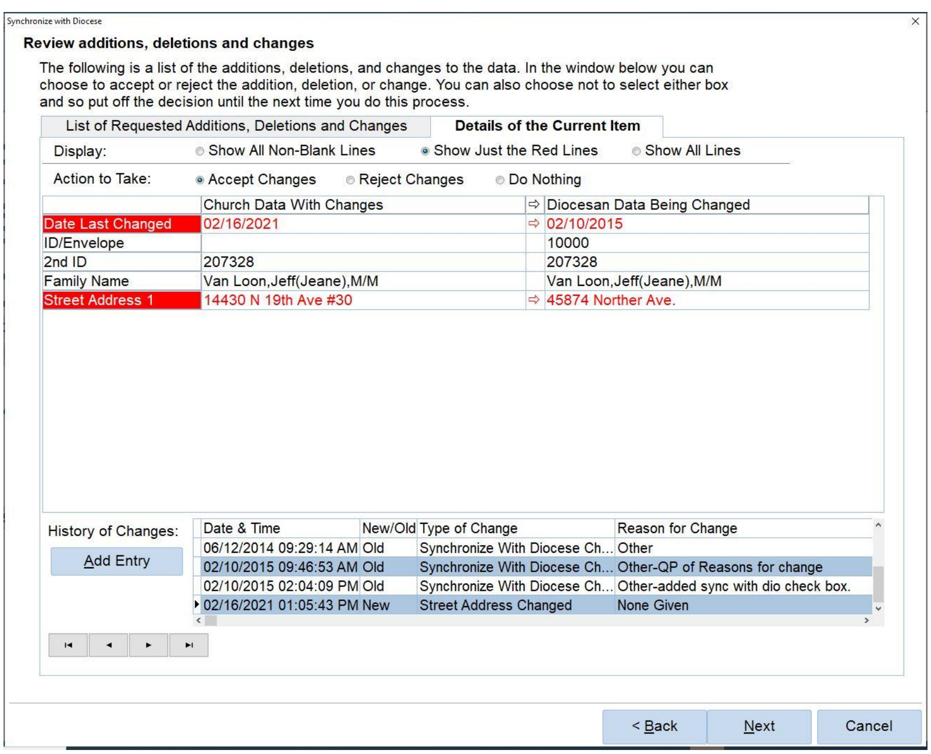
- Families Added by the Church
- Families Changed by the Church
- Families Removed by the Church
- Families Added by the Diocese (uncommon)
- Families Changed by the Diocese
- Families Changed by Both



For each entry you must either check Accept Request or Reject Request. If you uncheck both entries the program will redisplay the family for review the next time you attempt the synchronization.

b. Click the **Details of the Current Item** tab to display for information about a specific family. If either the church or diocese has changed information, it will be highlighted in red. Use the option at the top of the tab to show just the red line.

c. Click **Next** when you are finished.



NOTE: The very first time you synchronize a family with the diocese, it will be identified as “Added by the Church”. This is normal and expected. After the family has been uploaded for the very first time, they will be assigned a temporary 2nd ID Number that begins with an asterisk. For example: *1234. This number will be replaced with a permanent number after the diocese performs the first synchronization step on their side. **Never** manually change the 2nd ID Number for a family unless instructed to do so by the diocese.

6. **Synchronize the Financial data**. Un-check this if you are not ready to send CSA pledges and payments and skip to step 7.
   a) The **Sync Financial Data** screen will appear. It will show totals on the screen. Please do not use these totals for the next step. DO NOT click the Calculate Totals button. Please use the figure from your Pledge Drive Status Report.
   b) Click **Next**.
   c) Enter the **Total Pledged** and click **OK**.
   d) Enter the **Total Paid** and click **OK**.
   e) You should receive the message **“The total Pledge & Paid exported EQUALS the amounts expected**.**”**
      i. If you receive any other message, there are problems with the information you’ve exported.
      ii. Print the error listing.
      iii. Stop the sync.
      iv. Fix keywords or email addresses or pledge/contribution information where necessary as indicated by the report.
   f) When you see the message **“The total Pledge & Paid exported EQUALS the amounts expected.”** Choose to either **Print** or **Close** this screen.
   g) When you hit **Close**, you will see the reminder **“Please remember to click the ‘Start Update’ button to complete the process.”** Click **OK** on this reminder.
7. Click the **Start Update** button.
8. Click the **Finish** button.
9. Review the Summary.
   a. If there are errors, either print the summary or write down any Names and ID numbers for which you received errors. This includes records for which you received the error “Cannot Find Family”.
10. Click **Finish**.
11. Review any errors.

    Families for which you’ve received the error “Cannot Find Family” may not have the Synchronize with Diocese box check marked.

Synchronization Issues for Cluster Churches

If your church is part of a cluster (several churches served by the same staff on the same computer) then there are some additional issues to be aware of.

Icons

PDS will set up several icons so that cluster churches may access their database.

The main Church Office icon is used to access all families within the cluster. Use this for your day-to-day work and when you want to do bulk mailings including all churches in the cluster.

There will be additional Church Office icons to access only the families and member for each church in the cluster. Use these church specific icons when you add or remove families from the cluster or to synchronize with the diocese.

For example, if you have a cluster of St. Mary, St. Mark, and St. Paul, there will be 4 icons total. Using the main Church Office icon will open the database and show you all families in the cluster. Use the St. Mary Church Office icon to access the database and only see the families and members for St. Mary.

Synchronization

The synchronization process works the same as previously described. However, you must use the individual church icons to synchronize the families. The diocese is still tracking these families as separate churches even though they are served under a common cluster.

Do Not use the main Church Office icon to synchronize with the diocese. Do not even bother to fill out the web service configuration information for the main Church Office icon. Only do this within the individual church icons.

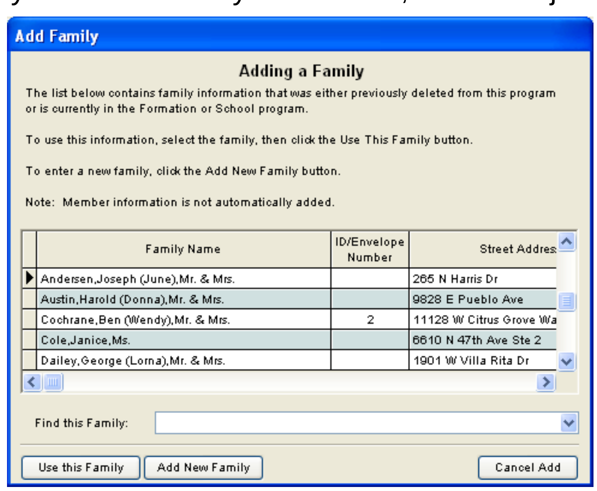
Adding and Deleting Families and Members

The separate icons each represent a different view of the database. We have one shared view (which is used when you need reports of everyone across churches) and then individual views for each church. The main Church Office icon is just a separate view of the database.

When you add a new family to the main Church Office icon (the shared view) it doesn't automatically make that family visible in any of the church specific views. Likewise, you wouldn't expect that adding a family to St. Mary would make the same family visible in St. Paul. So, there is a minor amount of extra work that must be done.

First, to recap a fundamental assumption, all primary day-to-day work is done from the main Church Office icon.

After adding a family to the main Church Office "view" you must add the family again to a specific church in the cluster. This is not as difficult as it sounds and does NOT require you to reenter any information, but rather just make a link to the family you just added.

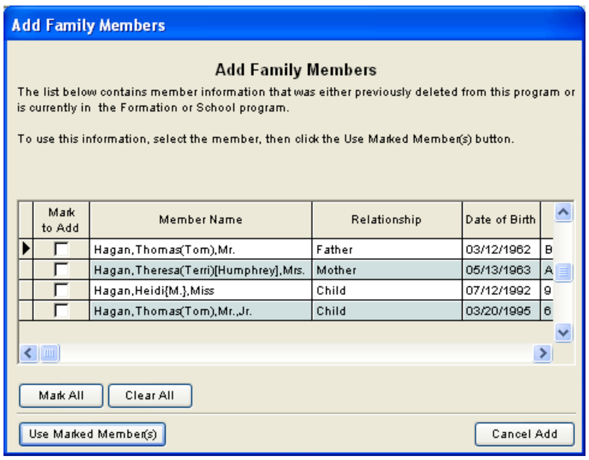


1. Start the main **Church Office** icon.
2. Click **Families**.
3. Click the **Add Family** button.
4. Browse through the list and verify the family isn't already in the database and click **Add New Family**.
5. Enter the **Family Details** and click **Save**.

6. Enter any member information for the family.
7. Go back to your Windows Desktop and double click the icon that represents **Church Office** for the *specific church in the cluster* you wish to add the family.

Here is where you actually add the family to the individual parish:

8. Click **Families**.
9. Click the **Add Family** button.
10. Now you know the family is already in the database, find them using the **Find this Family** pull-down or scroll through the list and click **Use this Family**.
11. Click the **Mark All** button to select all the family members.
12. Click the **Use Marked Members** buttons.



Just a few extra clicks and the family is visible in the main view and the specific church view.

In a similar manner if you add a member to an existing family in the main database you'll have to add the member to a specific cluster church. Again, this just involves connecting to the existing record, NOT re-entering all of the data.

Likewise, when you delete a family using one of the Church Office icons it doesn't automatically remove it from the other "views" of the database. Once you have deleted a family (or member) from the main Church Office icon you'll want to finish the job by duplicating the delete in the specific church icon.

Possible Errors: If you see the error pictured below, it is because you are sending up CSA pledge or payment information for a family that you are not including in your sync.

1. Verify that you are checking the “Synchronize with Diocese” box for all donors.
2. Verify that you are sending up the right group of people in the sync.