How to Handle Anonymous Contributions

Guidelines

We have noticed over the past year that each parish seems to handle anonymous contributions to the CSA differently. This is creating several problems for us including having many additional anonymous records in our database and also making it difficult to keep accurate CSA totals for each parish. To rectify this, we wish to establish a uniform policy for handling anonymous CSA contributions and are recommending that each parish use the following guidelines:

1. Each parish should establish only <u>one</u> family record with a family name and primary ID/Envelope number of "[Loose". (You may already have this record in use in your database) Any and all anonymous CSA contributions should be posted to this family record. This is a special family in PDS Church office that won't be printed on general family and member reports but can optionally be included in financial reports.

2. Whether the record currently exists or you are creating a new "[Loose" record, the Second ID Number must be manually entered and is based on your parish number. To enter the second ID, use the instructions as described in the following section. This ID number is exactly 10 characters long and starts with "[Loos" (not including quotes, but with no e at the end like the primary ID number. This is followed by your 5 digit parish ID Number. For example: "[Loos12345" for parish number 12345.

3. This record should be kept as an active file at all times.

4. On the Family Detail screen uncheck the box for Envelope User.

5. All anonymous CSA contributions should be posted as "CSA One time payments". You should not be posting any pledges to this record as there is no need to post a pledge.

(Note that this anonymous file does not need to be used exclusively for CSA contributions. It can also be used for other funds as well.) This can be used to record loose cash and coins dropped in the offertory. If you need to combine previously used anonymous records with the "[Loose" record, the instructions for doing this are also described in a following section.

If you see any possible problems with following these guidelines, contact the Annual Appeals office.

Procedures

1. Temporarily disable protection for the 2nd ID numbers so you can manually enter the correct number for your parish.

    a. Start Church Office.

    b. On the Ribbon Bar select the **Setup/Admin** tab.

    c. Select **Setup Options** from the Setup section.

    d. Select **ID Num/Env Num Options**.

    e. Select the option to **Display the Second ID Number**.

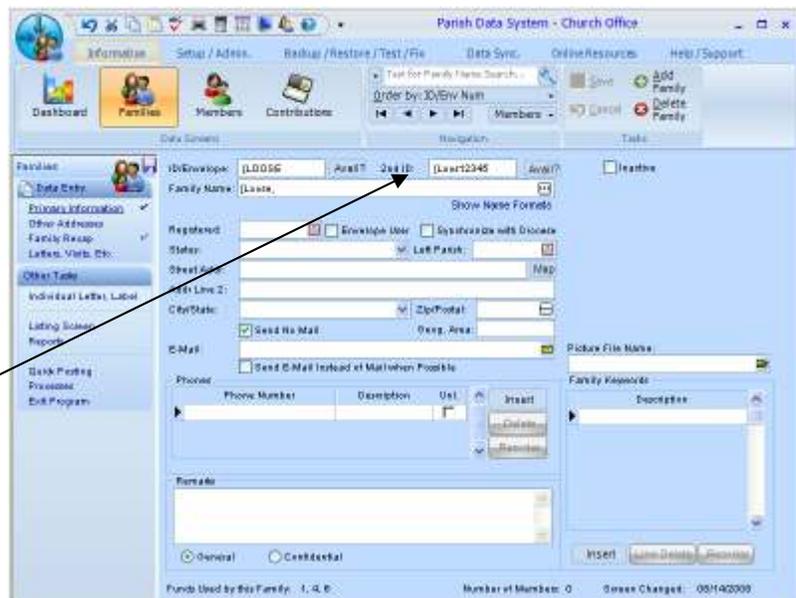   f. Uncheck the box for **Don't Allow Changes**.

    g. Click **Save/OK**.

    h. Click **Close**.
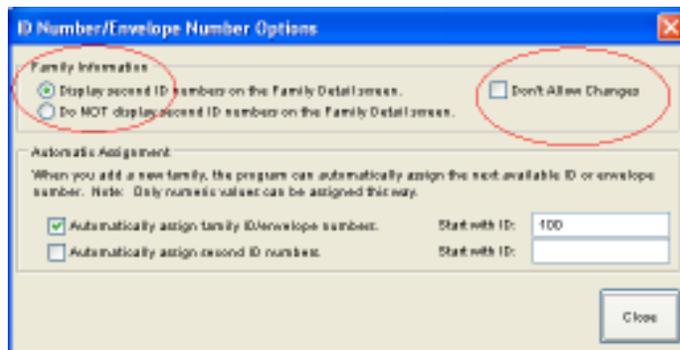
2. On the Ribbon Bar select the **Information** tab.

3. Select **Families** in the Data Screens section.

4. Use the **Navigation** section to find an existing family with an ID/Envelope number of **[Loose** . If this family already exists, proceed to step 5 to change the second ID number for this record. If you do not already have this family, continue on with step 4a below.

    a. Click the **Add Family** button.

    b. If you are sharing a database (for example when you are also using Formation Office, School Office, or are part of a cluster), the program will display a list of families not currently visible in Church Office. If this appears, click the **Add New Family** button.

    c. Enter **[Loose** for both the primary **ID/Envelope** number and the families' last name. This is the only information that needs to be entered.

5. Edit the **2nd ID** number to be **[Loos#####** where the ##### represents your 5 digit parish code. For example, parish 12345 will enter **[Loos12345**.

6. Click the **Save** button.

7. Re-enable protection for the 2nd ID numbers.

   a. On the Ribbon Bar select the **Setup/Admin** tab.

   b. Select **Setup Options** from the Setup section.

   c. Select **ID Num/Env Num Options**.

   d. Check the box for **Don't Allow Changes**.

   e. Click **Save/OK**.

   f. Click **Close**.
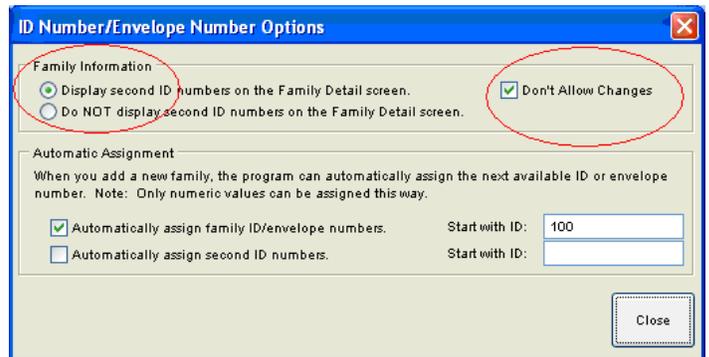
Report Features

When running reports you will have the option of including the Loose family. On the last step of the report wizard, check the box for **Include Family Marked as Loose Collections**.
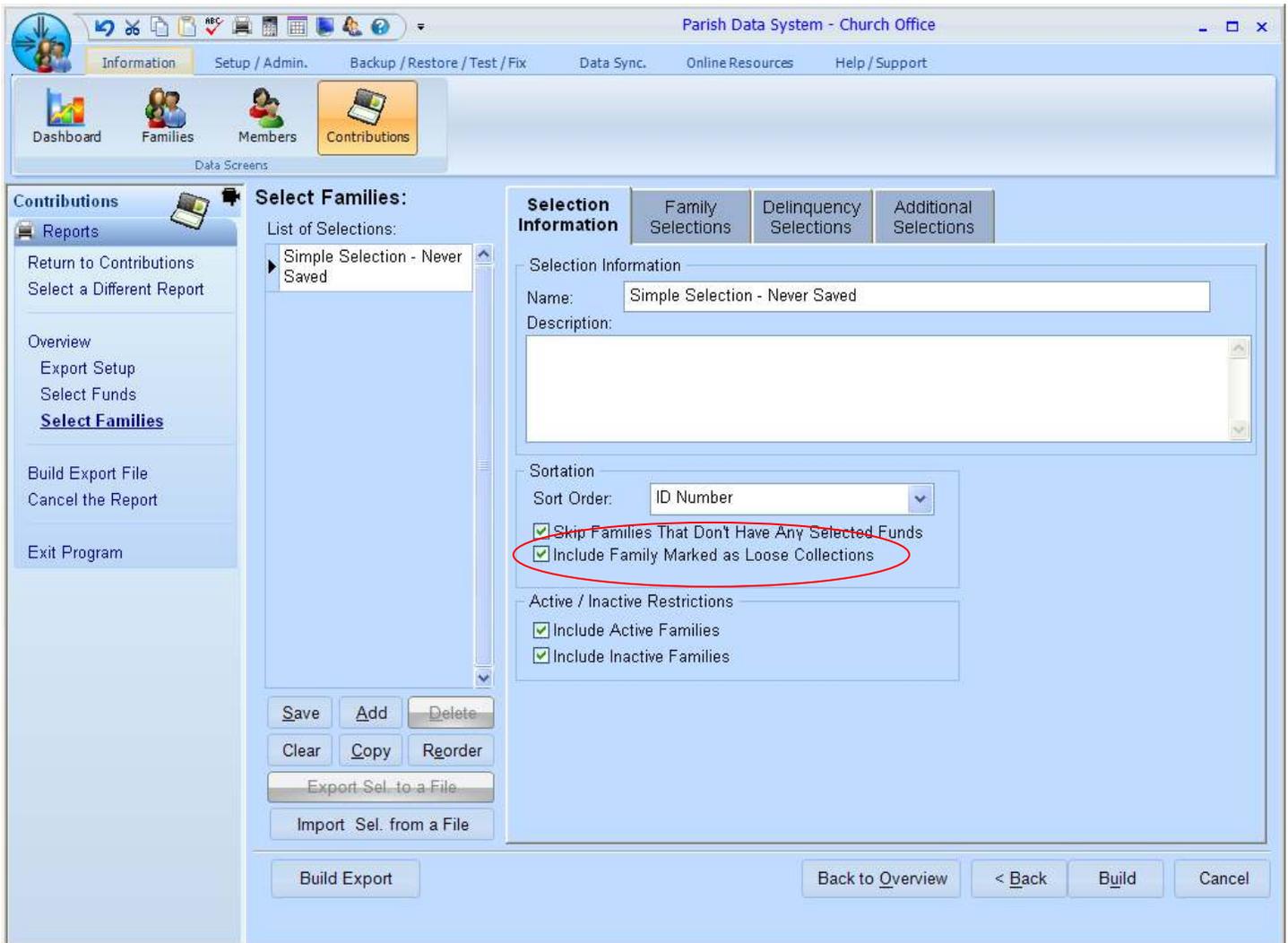
What if I Already Have a "[Loose" Family and a Different "Anonymous Contributions" Family?

If you already are using [Loose for tracking your loose cash collections, but you also have a different family that you are using to track Anonymous CSA contributions, use the Combine Families feature in Church Office to merge these two records into a single family (keep the **[Loose**).

Procedures

1. Backup your Church Office program.
   a. From the Ribbon Bar, select **Backup/Restore/Test/Fix**.
   b. Select **Backup Data** from the Backup & Restore section.
   c. Select your usual **Backup Method**.
   d. Click the **Start Backup** button.
   e. When the backup is complete, click **Close**.
2. Merge the two families together.
   a. From the Ribbon Bar, select the **Setup/Admin** page.
   b. Select **System Processes** from the Utilities section..
   c. Select **Combine Families**.
   d. If you have run this process before it will display a list of families. Skip to step 2 e.
      i.   Press **Cancel** to skip building a list of potential duplicates.
   e. At the top of the dialog, choose the **Select Families Manually** tab.
   f. From the list at the top of the screen, select the **[Loose** family.
   g. From the list at the bottom of the screen, select the other **Anonymous Contributions** family (select whatever name you are using).
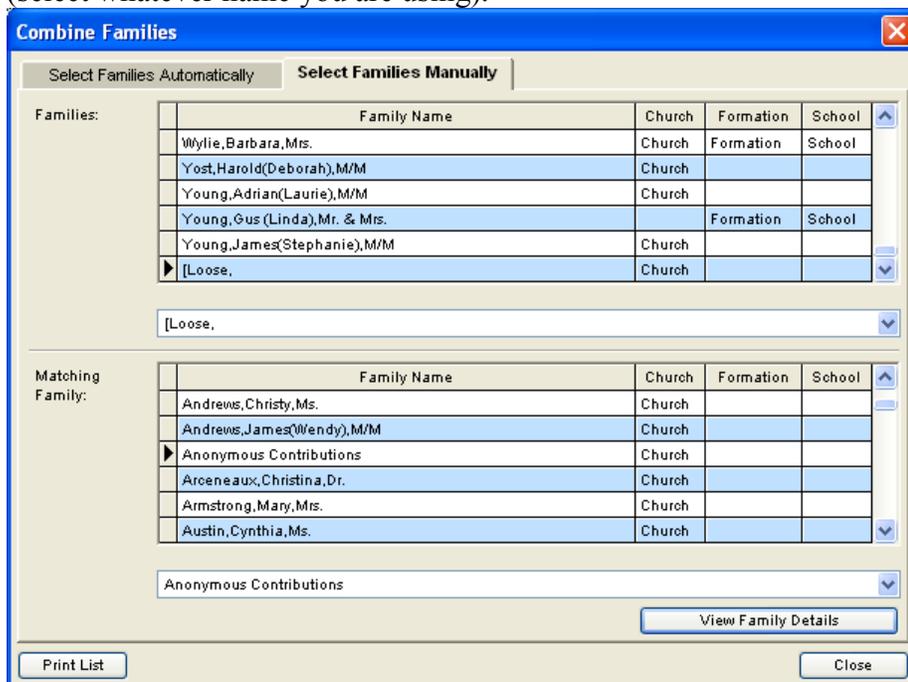
   h. Click the **View Family Details** button.

i. For each line identified in red, choose checkboxes that correspond to the [Loose family (you may need to scroll down to see all red lines.

j. Click the **Combine Families** button.
k. Click **Close**.

For more details about this process, press F1 for help or contact PDS technical support.