Posting CSA Pledges in Ministry Platform

Sorting pledge cards/envelopes for easier data entry.

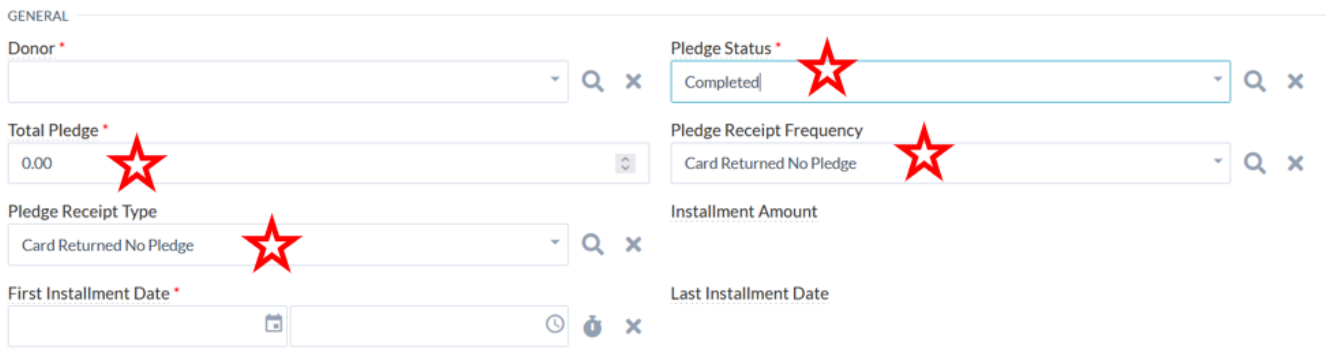
Divide pledge cards/envelopes into 4 main groups upon receipt.

Group 1 Payment received without identifying paperwork like a pledge card/envelope or reminder.	Group 2 Pledge with payment for full amount of the pledge.	Group 3 Pledge with no payment or partial payment. Determine parishioner's payment reminder preference.	Group 4 Those who are not making a pledge this year.
If the payment is in cash, enter the payment during your next batch in the **Loose** family. **If the payment is made by check,** a. enter the payment during your next batch. a. If the person/family exists, select them from the **Batch Manager Tool** (BMT) b. If the person/family doesn't exist, add them through the BMT. You don't need to look for an existing pledge: **If there ISN'T a pledge,** it will be created overnight. **If there IS a pledge**, the payment will be attributed to the pledge. If the total payments is greater than the pledge, the pledge will be updated overnight to equal the total amount of pledges.	**a.** Enter the payment during your next batch. **The pledge will be created for you when the nightly process runs.** Since the pledge is paid in full, there is no need to enter a **Pledge Receipt Type** (Fund keyword 1) or **Pledge Receipt Frequency** (Fund Keyword 2).	a. Proceed to the instructions on page 2 entitled "**Creating a pledge.**"	a. Proceed to the instructions on page 2 entitled "**Creating a pledge**" paying special attention to the notation highlighted in green. **Why do we ask you to do this step?** Knowing a family has decided not to pledge this year, tracking "No Reminder" you can be sure not to include them when sending follow-up letters later in the year.

Creating a pledge (Important: Pledges created the day after a batch will result in duplicate pledges.

1. Partner parishes: be sure to have the correct congregation selected in the upper right corner.
2. Click **Contributions** and choose **Pledge Campaigns**.
3. Double click **this year's CSA** pledge campaign and click the blue **Pledges** link across the top.
4. Click the **New Pledge** button.
5. Start typing the Family's last name in the **Donor** field.
   a) **If the donor doesn't exist** set the card aside and use the use the **Add/Edit Family** tool to add them and then return to add their pledge.
   b) **If the donor has chosen E-Mail delivery,** the email should appear next to the last name in the **Donor** field. Compare it to the pledge card and choose the person displaying the correct email address.
      i) **If the email address is missing or wrong**, make note of it and fix their contact record later through the Add/Edit Family tool.
   c) In the case of a couple, **if the pledge is from both the husband and the wife**, select the husband's record.
   d) In the case of a couple, **if the pledge is from just the husband or just the wife,**
      i) Select the appropriate individual
      ii) Later check to make sure their Donor record is set to Individual (Instructions follow)
6. If this is an actual pledge, continue to step 7 - 14.
   If the family has decided not to pledge this year (Group 4),
   Set the pledge according to the image below **and continue to steps 10 and 12-14**.
7. Choose **Active** from the **Pledge Status** drop menu. **Reminder**: You NEVER have to change a pledge to Completed. The only other option you would ever choose here is Discontinue in the event the donor has decided not to continue the pledge.
8. Enter the donor's pledge in the **Total Pledge** field.
9. Set up the reminder delivery method
   a) From the **Pledge Receipt Frequency** choose [No Reminder, Monthly Reminder, Bi-monthly Reminder, or May/November Reminder].
   b) From the **Pledge Receipt Type** list choose the reminder delivery method [No Reminder, Standard Mail Reminder or E-mail Reminder].
10. **First Installment date**, should ALWAYS be 2/1/20## where ## = this year. You can ignore the date MP automatically populates in the **Last Installment date field.**
11. Click the **Save** button and click the **X** in the upper right to close the record.

12. Include all checks in your next batch entered through the **Batch Manager Tool**.



Miscellaneous CSA topics

Increasing or reducing the Pledge Amount or changing the Pledge Receipt Frequency or **Type**

1. Click **Contributions** and choose **CSA Campaigns**
2. Double click the current CSA and click the **Pledges** link.
3. Use the search tool to locate the donor and double click to open the record.
4. Click the **Edit** button and change the **pledge amount, Pledge Receipt Frequency or Pledge Receipt Type**
5. Feel free to add text in the **Note** field if you desire.
6. Click the **Save** button and click the **X** in the upper right to close the record.

Adding a payment to last year's CSA: As long as you choose last year's CSA fund in the **Batch Manager Tool** (BMT), the payment will be attributed to that CSA.

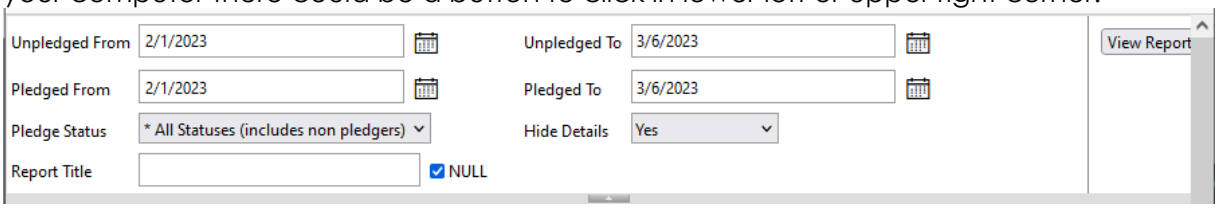
Change the pledge to individual: In some couples, one of the spouses may not be Catholic and as such they may prefer the CSA reminders include only one spouse name. Following these steps will create two separate giving units – one for each head of household.

1. Click **Contributions** and choose **Donors.**
2. Locate the wife.
3. Double click on his or her donor record.
4. Click the **Edit** button on the left.
5. Change the **Statement Type** from **Family** to **Individual**.
6. Click the **Save** button and click the **X** in the upper right to close the record.
7. Repeat steps 3-7 for the husband.

CSA Reporting

CSA status at a glance - balance totals are visible at the bottom of the screen

1. Click **Contributions** and choose **CSA Campaign Pledges.**
   a. **Last year:** Change the view to "**Pledges for this year's campaign**"
   b. **This year:** Change the view to "**Pledges for last year's campaign"**

Printing the equivalent of the Pledge Drive Status Report

1. Click **Contributions** and choose **CSA Campaigns.**
2. Check mark the campaign for the parish you wish to print. Partner parishes only check one parish.
3. Click the **Reports** button and choose **Selected Campaign Donor Summary - Erie.**
4. See the sample screen shot below for setting up the report.
   Both the **Unpledged From** and the **Pledged From** fields should read **2/1/**____ Current CSA year).
   If you opened your CSA earlier than 2/1/___ you will have to use the date of your first donation.
5. Click **View Report** then click the **diskette** button and choose **PDF.** Depending on how PDFs open on your computer there could be a button to click in lower left or upper right corner.