Creating a Batch in the New Batch Manager

Additional features coming soon

Importing Donations: Partner parishes, please CAREFULLY review imported batches. There is a glitch that may not match the record to the right envelope number. I have submitted a ticket. I am waiting for an answer.

Memorized Batches – timesaver for parishes who enter identical batches each month/week

Pledge entry – timesaver for entering new pledges that fall into Groups 1, 3 and 4. Pledges that fall into Group 2 will not change as they are automatically created each night. This feature is not ready for the Diocese of Erie yet. Please do NOT use any of the Pledge features in the New BMT until the Diocese of Erie sends instrutions.

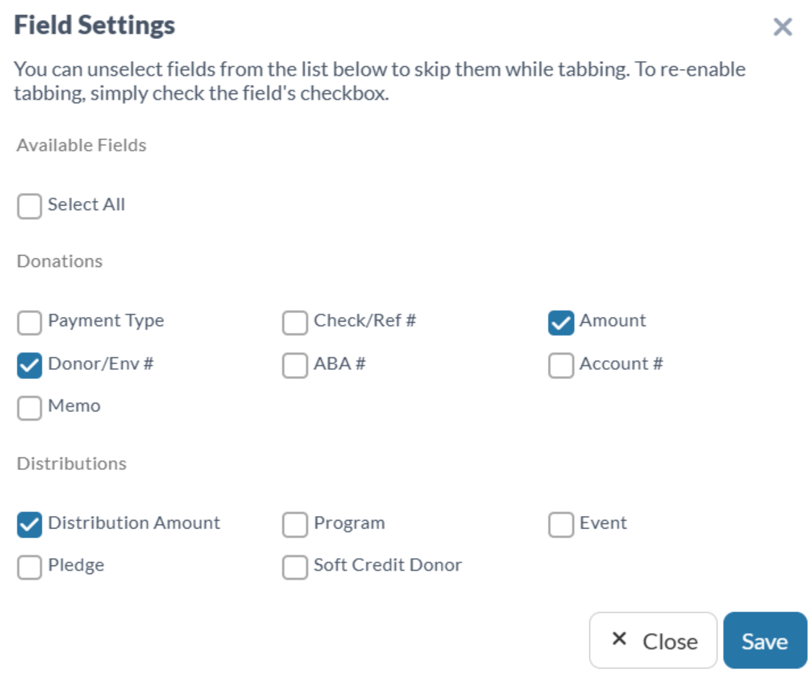
- **Group 1**: Payment received without pledge card/envelope or reminder
- **Group 2:** Pledge with payment for full amount of the pledge.
- **Group 3:** Pledge with no payment or partial payment..
- **Group 4:** Those who are not making a pledge this year.

Create the batch

1. Click the flag button in the upper right corner by your initials and choose **Batch manager**. You will see all unfinalized batches.
2. Click **Batch** button on the left and select **New**.
3. Complete all fields on the **Edit Batch** window.
   a) Create a **Batch Name** as you see fit.
   b) Use the Deposit date or the Sunday mass as the **Batch Date**.
   c) Choose **check** or **cash** from the **Payment Type** drop down menu. (Some organize their stack of donations so they can enter checks first and cash last. Some create a separate batch for checks vs. cash.)
   d) **Note for Partner Parishes:** Choose the appropriate **Congregation** from the list.
   e) Enter the **Item Count**. (You can guess if you don't know.)
   f) Enter the **Expected Total Amount** for that deposit.
   g) Add all necessary programs/funds to the batch
      i. Click the blue **Add Program** link to choose the correct program.
      ii. Repeat if there are checks for more than one program/fund in this batch. Checks with payments for more than one program are called "Split Checks." See the note in red on page 2.
      iii. Click anywhere or tap the Esc key on the keyboard to close the dropdown.
   h) Check the "Create blank items" checkbox if it is not already checked.
   i) Click **Save button.**

Initial Setup

1. Click the **Settings** button
2. Click Default Batch View and choose Expand all
3. Choose **Fields.**
4. Check mark these fields



Add donations to the batch

1. Click the Expand All toggle in the upper right corner
2. Use your mouse to click in the **Check/Ref** field,
3. Type the **check number** and press **Tab**.
4. Key in the **check amount** and press **Tab**
5. Type the **envelope number** or type the person's name to search for them. (Don't forget to double check they are the correct person.) Note: Cash donations with no identifying paperwork should be credited to the envelope number you have given to your Loose contact..
6. If this IS NOT a split check, press **Tab** to start entering the next check..
   If this IS a check for more than one program/fund scroll down and then manually click on the next Default Contact in the list to start entering the next check.
7. Repeat yellow steps for each check in this batch.
8. When done, delete any blank/red lines using the X on the far right.
9. If your "item count" guess was wrong, there would be a red error. Click the **Edit** button name and fix the item count.
10. Click the **Finalize** button when done. You cannot finalize if there are any red warnings.

Correcting Errors

Delete or Edit a Batch that Has NOT Been Finalized

1. Click the flag button and choose **Batch manager**.
   You will see all unfinalized batches.
2. **To delete the batch:** Click the **…** button on the far right and choose **Delete**
   To edit the batch: Click the batch name to open the batch. Continue entering payments as you would normally.

Delete or Edit a Batch that HAS BEEN Finalized

First delete the deposit

1. Click **Contributions** and choose **Deposits**
2. Search for and check mark the deposit you need to delete or reprint.
3. Click **Actions** and choose **Delete**.

Then Unfinalize the batch

4. Click **Contributions** and choose **Batches**.
5. Find the batch and click on it to open it.
6. Click **Edit Record**.
7. If there is a date in **Finalize Date**, click "**X**" to blank out the date.
8. If someone other than you listed as **Operator User**, enter your last name in the field to select YOUR user ID.
9. Click **Save**

Finally fix the batch

10. Click the flag button and choose Batch manager.
11. Click **Open** and choose the batch you would like to edit or delete.
12. **To delete the batch:** Click the **…** button on the far right and choose **Delete**
    To edit the batch: Click the batch name to open the batch.
    Make any necessary changes.
    Create a new Deposit and print your favorite reports as you would normally