



Crediting payment for deceased person



Deceased individuals cannot be seen by the Batch Manager. This workaround involves applying the payment to your loose donor and then manually applying the payment to the deceased individual.

Entering the payment in a batch by faking out the system.

1. Create a batch as you would normally.
2. Credit the payment to your parish loose family to fake out the system.
3. Add a note to the payment indicating the name of the deceased individual.
4. Finalize the batch as usual.

Crediting the payment to the deceased donor to fix the fake out.

1. Click **Contributions** and choose **Donations**
2. Search for your Loose donor and click to open today's donation.
3. Click the **Edit** button
4. Click the magnifying glass next to the Donor's field
5. Change the view to **Env Deceased Contacts**
6. Select the correct deceased individual.
7. Click **Save**.

Printing batch reports and creating deposit

1. Click **Contributions** and choose **Batches**.
2. Check mark the batch you want to print.
3. Click the **Reports** button and choose **Selected Batch Listing Erie**.
4. Click the **Print** button. Print the entire report or just your preferred pages.
5. Click the **X** in the right corner to close the small **Report Selected Batch Listing** window.

Preparing the deposit Note: A deposit can contain multiple batches.

6. Click the **X** in the upper right corner of the **Selected Batch Listing Erie** to close the PDF.
7. Click the **X** in the right corner to close the small **Report Selected Batch Listing** window.
8. Click **Contributions** and choose **Batches**.
9. Check mark all batches included in your bank deposit.
10. Click the **Tools** button in the upper right corner and choose **Create Deposit**.
11. Complete the **New Deposit** form.
 - a) Name the deposit Sunday ##/##/## or a name of your choosing.
 - b) Change the **Deposit Date** to that of the actual bank deposit
 - c) Do **not** toggle "One Deposit Per Batch" unless that is your practice.
12. Click **Create Deposit** and click **Close**.