



Moving donations/pledges when splitting Families



These instructions assume you have already split the family

Ask yourself "How sure am I these financial transactions **should** be moved?" In some cases, moving donations from one spouse to another can have legal considerations.

Moving a donation accidentally attributed to the wrong person.

Moving a pledge accidentally attributed to the wrong person.

Moving a donation from a non-catholic spouse to the catholic spouse.

You accidentally attributed a pledge/donation to the wrong person:

Follow steps on the following page for moving the pledges and donations.

Moving a donation from a non-catholic spouse to the catholic spouse.

The Catholic was probably donating to the church. It's clearer the donations should be moved to the Catholic.

See which member of the family has the donor record and therefore the donations.

Always check to make sure you don't have any saved selections.

1. Click the **Home** button on the menu and click the blue **My Selections** link across the top.
2. Click the **checkbox at the bottom of the screen** to any selections shown on this screen.
3. Click the **Actions** button and choose **Clear** and the **Clear** button.
4. Click **Contributions** and choose **Donors**
5. Using the last name, search for donor records for the family.
 - **If the only donor record is already associated with the Catholic**, you are finished.
 - **If the only donor record is associated with the non-Catholic**,
 - a. Open the record, click **Edit**, delete the envelope number and click **Save**.
 - b. Click **Contacts** and locate the person to whom donations should be moved.
 - c. Click the **Tools** button and choose **Add/Edit Family** tool.
 - d. Check the box for "**donor record**" under the Catholic's tile on the screen. You may have to click a **More** button to see the donor record check box.
 - e. Click **Save** and **Close**.
 - f. Follow steps on the following page for moving the pledges and donations.
 - g. Later add the envelope number to the correct person's donor record.
 - **If there are 2 donor records**, open each and click the **Donations** link to see where the donations were recorded then Follow steps on the following page for moving the pledges and donations.

Both members of the couple are Catholic. This is harder because it may be difficult to determine WHO did the giving. Just because one member of the couple is not around, does not necessarily mean all or any of the donations should be moved. Part of this is due to the tax ramifications. In some cases, you may only be able to move donations received after the official date of the divorce.

Moving Pledges And Donations

Always check to make sure you don't have any saved selections.

- A. Click the **Home** button on the menu and click the blue **My Selections** link across the top.
- B. Click the **checkbox at the bottom of the screen** to any selections shown on this screen.
- C. Click the **Actions** button and choose **Clear** and the **Clear** button.

Moving Pledges: **If there is a CSA pledge**, you may need to move the pledge or even split the pledge which might mean splitting some of the donations.

Splitting the pledge and any donations:

1. Send an email to support@thinkministry.com to submit a ticket to support asking for help with this very complicated scenario.

Moving the pledge one at a time:

1. Click **CSA or Other Campaigns**, choose **Pledges** and search for the donor.
2. Click on a pledge and click the **Edit** button.
3. Click the **Magnifying glass** button under **the** Donor heading to search for the person to whom you wish to move the pledge.
4. Click the **Save** button

Moving several pledges in bulk:

1. Follow steps A-B above to check for and clear sticky selections.
2. Click **CSA or Other Campaigns** and choose **Pledges**.
3. Change the view to **All records**.
4. Search for the Person who currently has the pledge. Use the search box under the **Display name** column, use this format: Doe,Joe.
5. Check every pledge being moved.
6. Click the **Actions** button in the upper right corner of the screen.
7. Choose **Assign**.
8. Check mark **Donor**
9. Click the **magnifying glass** and search for the person to whom the donations should be moved.
10. Click **Assign** and confirm the assignment.
11. In the bottom left corner of the screen, click the drop arrow next to **All Records** and choose **Current/Unsaved Selections**.
12. Click the X to clear sticky selections.

Mass Assign

GENERAL

Donor *

Pledge Campaign *

Pledge Status *

Total Pledge *

Pledge Receipt Frequency

Pledge Receipt Type

First Installment Date *
 Date/Time Date Time

Notes
 Append

Moving Donations

Move Donation one Donation at a time.

1. Click **Contributions** and choose **Donations**
2. Change the view to **All Donations**.
3. Search for and open the record where donations are currently recorded.
4. Click the **Edit** button.
5. Click the **magnifying glass** under the **Donation** header.
6. Search for the contact to which you are moving the donation.
7. Click **Save**.

Moving several donations in bulk.

13. Follow steps A-B above to check for and clear sticky selections.
14. Click **Contributions** and choose **Donations**.
15. Change the view to **All records**.
16. Search for the donation record for the person to whom donations are currently recorded. Use the search box under the **Display name** column, use this format: Doe,Joe.
17. Check every donation being moved.
18. Click the **Actions** button in the upper right corner of the screen.
19. Choose **Assign**.
20. Check mark **Donor**
21. Click the **magnifying glass** and search for the person to whom the donations should be moved.
22. Click **Assign** and confirm the assignment.
23. In the bottom left corner of the screen, click the drop arrow next to **All Records** and choose **Current/Unsaved Selections**.
24. Click the X to clear sticky selections.

Mass Assign

GENERAL

Donor * Donation Amount *

Donation Date * Payment Type *

Item Number Batch

Notes

Append

Donor Account Anonymous *

Assign Cancel