



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?" Here are some scenarios:

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

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

One member of the couple was not Catholic: 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.

1. Click **Contributions** and choose **Donors**
2. 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 **Contributions**, 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 **Contributions** 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.

The screenshot shows a 'Mass Assign' dialog box with a 'GENERAL' tab. It contains several search fields with checkboxes and magnifying glass icons. The fields are: Donor *, Pledge Campaign *, Pledge Status *, Total Pledge *, Pledge Receipt Frequency, Pledge Receipt Type, and First Installment Date *. The 'First Installment Date' field has radio buttons for Date/Time, Date, and Time. There is also a 'Notes' section with an 'Append' checkbox. At the bottom right, there are 'Assign' and 'Cancel' buttons.

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.

Fixing a donation credited to the wrong fund:

Did you mean to choose the CSA but chose a different fund instead? Yes? See next page

Did you choose CSA when it should have been a different fund? Yes? See next page.

Fixing a transaction that had nothing to do with the CSA.

1. Click **Contributions** and then **Donation Distributions**.
2. Find the donation with the incorrect fund and click on it to open it.
3. Click the **Edit** button.
4. Click the magnifying glass next to **Program** and choose the right program.
5. Click **Save**.

Fixing a donation credited to the wrong fund:

Meant to pick the CSA fund but credited the donation to a different fund instead:

1. Check **Contributions > Pledges** and see if they have an active pledge for this year. If they don't, create one.
2. Click **Contributions** and then **Donation Distributions**.
3. Find the donation with the incorrect fund and click to open it.
4. Click the **Edit** button.
5. Click the magnifying glass next to **Program** and choose the right program.
6. Click the magnifying glass next to **Pledge**
7. Find and click on this person's pledge.
8. Click **Save**.

Picked CSA when it should have been a different fund

1. Click **Contributions** and then **Donation Distributions**.
2. Find the donation with the incorrect fund and click to open it.
3. Click the **Edit** button
4. Click the magnifying glass next to **Program** and choose the right program.
5. Click the small "X" next to the **Pledge** to clear that field.
6. Click **Save**.

The overnight process would have created a pledge or changed the **Total Pledge** because of this incorrect donation. You will have to either delete the pledge or fix the Total Pledge amount.

7. Click **CSA Campaigns** and click the current campaign to open it
8. Click the **Pledges** tab.
9. Search for the pledge that was created in error or that has the wrong total pledge.
10. Click the blue chain link for that pledge.
11. Follow instructions in the column matching the issue which needs to be fixed.

The Pledge shouldn't have been created	The Total Pledge is bigger than it should be
Click the Donations tab to make sure there are no more donations that need to be fixed. If there are, you should fix those too.	Click the Edit button.
Click the General tab.	Fix the Total Pledge .
Click the Tools button and choose Delete	Click Save .