Annual Giving letters using the 'ADMIN:Acknowledgement Letters' Report

AOC01-ADMIN:Acknowledgement Letters
Using the ADMIN Parish Staff family member 'Acknowledgement', define letters for sending thank you letters for donations. (bmaly 2022.03.11)
https://finance.catholicaoc.org/DOC/AOC01.pdf

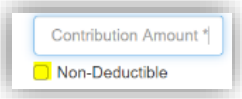
Description – For a given date range, identifies all gifts over the given threshold and prepares a letter to be send to the donor.

Parameters:

- Church
- Form (multiple forms can be defined)
- Family Statuses
- Begin Date
- End Date
- Fund Buckets (suggest 'All' given proper configuration)
- Funds (Suggest 'All' given proper configuration)
- Limit Low (Family picklist lower giving level)
- Families (amount)
- Greeting
- Date
- Address to use
- Address format
- Format Options

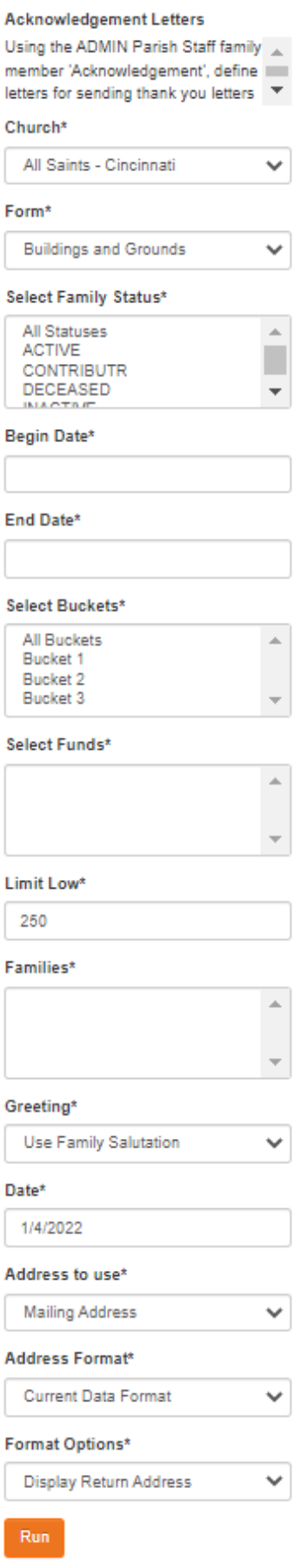
Purpose – Prepares acknowledgement letter for large donations.

Directions: If you use the Funds to log any fees which do not qualify as deductible, or contributions from pre-tax sources like IRA's or stock, these funds need to be identified as 'non-deductible' in Gabriel. (other items non-deductible include registration fees, room rental fees, class fees, wedding fees) Gabriel can identify, at the time of entry, if an item is non-deductible. Your parish may have a separate fund for these items. This report will use either the 'non-deductible' checkbox, or the designation of a fund as a 'Bucket-2' fund, to segregate these items in the letters. Also, you may take this opportunity to designate a bucket for all your funds. This report and future reports will use this designation to distinguish 'Parish', 'Non-Deductible' or 'Diocese'.



- Bucket 1 - Parish funds
- Bucket 2 - Non-deductible
- Bucket 3 – Fees/charges

Note: The non-deductible indicator can be used for any of the single contribution entries. In addition, if you have a 'Contributions' and a 'Contributions Non-Deductible', and you would like to simplify your funds list and use the non-deductible indicator, the historical data can be merged with the non-deductible fund historical data indicator set to TRUE.



For assistance with configuring funds with this report, contact Bill Maly 513.263.3354.

The letter is intended to provide a 'thank you' and documentation for families making large donations. Many parishes use this as an opportunity to show gratitude and reach out to their families.

The parameters for the report allow you to select a subset of families and funds to be reported. If you use the above process to designate your funds into buckets, the bucket and fund selections can be set to 'All'.

Limit Low parameter is set to 250. All donations over this amount for the selected date range will display in the Families parameter. (An optional method to flag donations is to enter '{ACK}' in the comments field of the contribution entry.)

Once you select the funds, there will be a 'pause' while the system retrieves a list of families matching the criteria entered to this point. You can select all families in the group, a single family, or select multiple families, by holding down the 'cntl' key and clicking on multiple family names.

The default first page summarization is by fund. You can override this using manually entered fund attributes. See below **Fund Attributes** for this advanced configuration.

Each family letter included a summary of the contribution. Non-deductible contributions are identified.

Greeting select the formal Salutation or casual First Name.

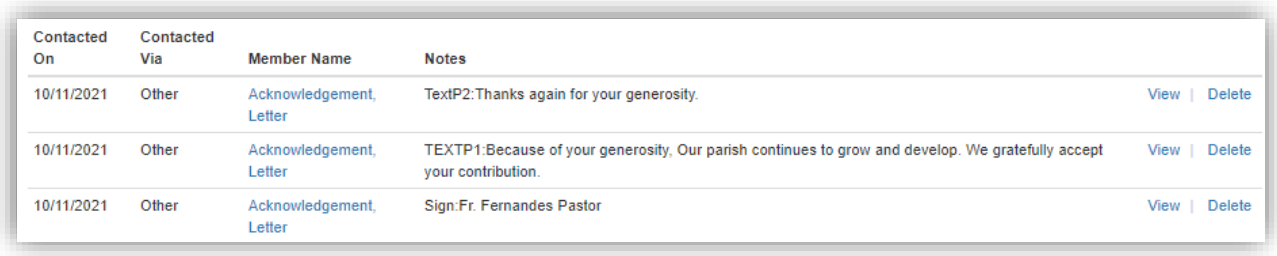
The date field can be changed from the default of 'today's date' if you're are back or forward dating the letters.

Each family can have a Street Address found on the main family page as well as a mailing address and an alternate address. The default 'Address to use' is set to Mailing Address, which considers date specific alternates and mailing addresses. You can switch this to Street Address if desired.

The 'Address Format' will give the choice for the address to Mixed Case, Upper Case (as desired by USPS) and left to the format found in your data (the default).

By default, your return address is printed. You can suppress this with the 'Format Options' parameter.

HIS REPORT USES THE PRM NOTE MERGE FEATURE. Every parish has been loaded with a Parish Staff family named ADMIN. In this family you will find a member named 'Acknowledgement, Letter'' and 'Acknowledgement, Memorial'. The text for the letter is defined in PRM notes. A parish can add multiple letter formats by adding a new member in the ADMIN family. The member's last name should be changed to 'Acknowledgement' with the first name being a description of the letter. This new 'letter' will appear in the 'Form' drop down parameter.



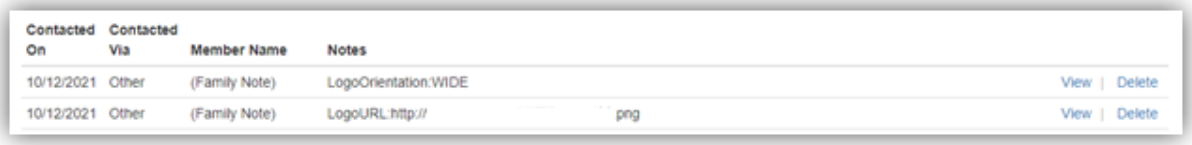
Contacted On	Contacted Via	Member Name	Notes	
10/11/2021	Other	Acknowledgement, Letter	TextP2:Thanks again for your generosity.	View | Delete
10/11/2021	Other	Acknowledgement, Letter	TEXTP1:Because of your generosity, Our parish continues to grow and develop. We gratefully accept your contribution.	View | Delete
10/11/2021	Other	Acknowledgement, Letter	Sign:Fr. Fernandes Pastor	View | Delete

Using these PRM notes, you can define multiple letters, each containing the text for your parish needs.

- A PRM note type of 'Other' with the first characters being 'TEXT:' is the content of the letter before the table showing giving summarized by fund.
  NOTES: for Text data
  For italic font use a 'tilde' +'I' before and an 'exclamation point' +'I' at end. sample
  For bold font use a 'tilde' +'B' before and an 'exclamation point' +'B' at end. sample
  For underline font use a 'tilde' +'U' before and an 'exclamation point' +'U' at end. sample
  Optionally, a 'forward slash' can be used as a carriage return. or simply use a carriage return in the note field.
- A PRM note type of 'Other' with the first characters being 'SIGN:' is the content of the person signing the letter.
- A PRM note type of 'Other' with the first characters being 'SIGNURL:' is the location of a png or jpg of the signer's signature.

Logo and return addresses: Family Level PRM notes can be used to define how your logo displays. This is an optional feature. You can also define these notes at the Member PRM level if you use a different logo for each letter type. Defining a member level PRM LogoURL and LogoOrientation will override the Family PRM definitions for LogoURL and LogoOrientation.

- A PRM note type of 'Other' with the first characters being 'LogoURL:' is the location of a png or jpg of the parish logo.
- A PRM note type of 'Other' with the first characters being 'LogoOrientation:' provides the report information about the physical dimensions of the logo file: Entering 'WIDE' will place the logo on the top of the page and the return address on the right. Entering 'Square' will place the logo on the top right of the page with the return address above the recipient's address.



Contacted On	Contacted Via	Member Name	Notes		
10/12/2021	Other	(Family Note)	LogoOrientation:WIDE		View | Delete
10/12/2021	Other	(Family Note)	LogoURL:http://	png	View | Delete

St. Ignatius of Loyola Church

5222 North Bend Road, Cincinnati, Ohio 45247 • (513) 661-6565

10/20/2021 ⇐ Date parameter

⇧ LogoURL

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Cincinnati, OH 45247

St Ignatius Parish
5222 North Bend Rd
Cincinnati, OH 45247

TextP1 ⇩

Dear Mr. & Mrs. Belanger,

Because of your generosity, Our parish continues to grow and develop. We gratefully accept your contribution.

Fund	Check #	Amount	Date	Comment
1 - Contributions		$300.00	10/10/2021	

Thanks again for your generosity. ⇐ TextP2

⇐ SignURL (optional)

Fr. Fernandes
Pastor

⇐ Sign

St Ignatius Parish has not provided, in whole or in part, any goods or services to the above named donor in exchange for this gift. This statement is provided by St Ignatius Parish in order to comply with the Internal Revenue Code. Retain this with your tax records.