AOC01x -ADMIN:Acknowledgement Letters Report MINI Page format (Half page landscape)

AOC01x-ADMIN:Acknowledgement Letters
MINI HALF-PAGE FORMAT - Using the ADMIN Parish Staff family member 'Acknowledgement', define letters for sending thank you letters for donations. (bmaly 2022.04.07)
https://finance.catholicaoc.org/DOC/AOC01x.pdf

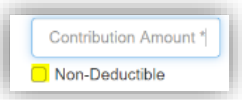
Description – For a given date range, identifies all gifts over the given threshold and prepares a letter to be send to the donor.

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
- Display Social Media

Purpose – Prepares acknowledgement letter for large donations.

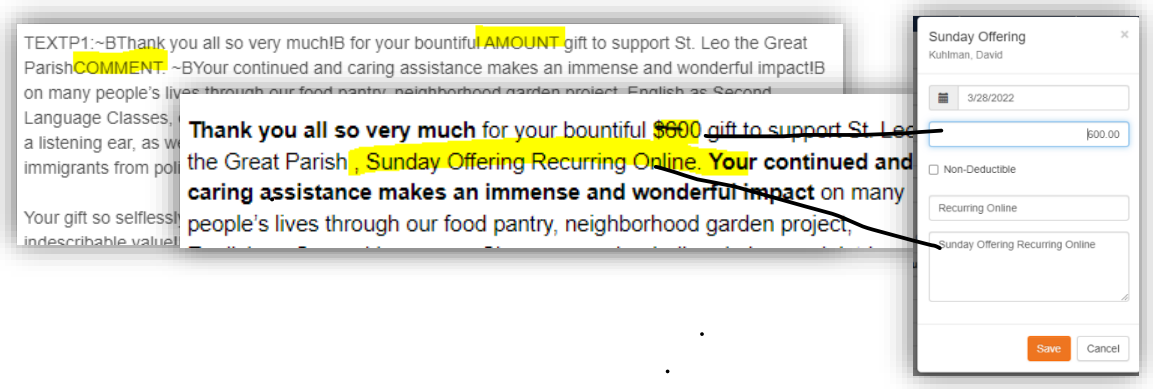
Directions: This report does not distinguish between contributions entered with the non-deductible flag. Use the full-page report.



This report prints on a half-page / landscape orientation so it can be printed on note cards. Also, the details of the contribution are 'merged' into the text of the TEXTP1 note where:

For IN KIND zero amounts (goods or services) the text imputed in the ‘Reference’ field replaces any occurrence of AMOUNT in the TEXTP1 string.

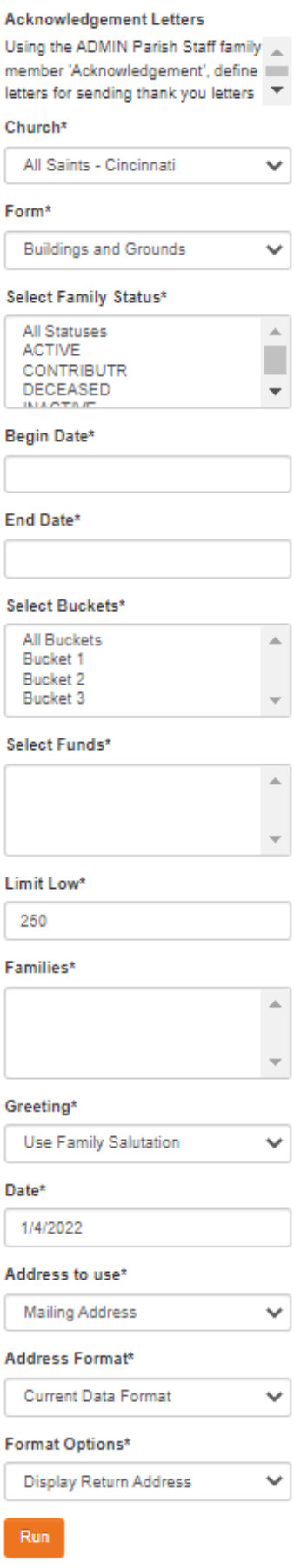
For both monetary and IN KIND donations, the information in the ‘Comment’ field replaces any occurrence of COMMENT in the TEXTP1 string.



Social Media Information:

Will display Parish Web Site, FaceBook and YouTube information on the bottom of the page. Detail of the Social Media information is configured in the Family PRM Notes as follows.

Contacted On	Contacted Via	Member Name	Notes
4/6/2022	Other	(Family Note)	YOUTUBE:StLeotheGreatParish
4/6/2022	Other	(Family Note)	WWW:YES
4/6/2022	Other	(Family Note)	FACEBOOK:St. Leo the Great Catholic Church



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.

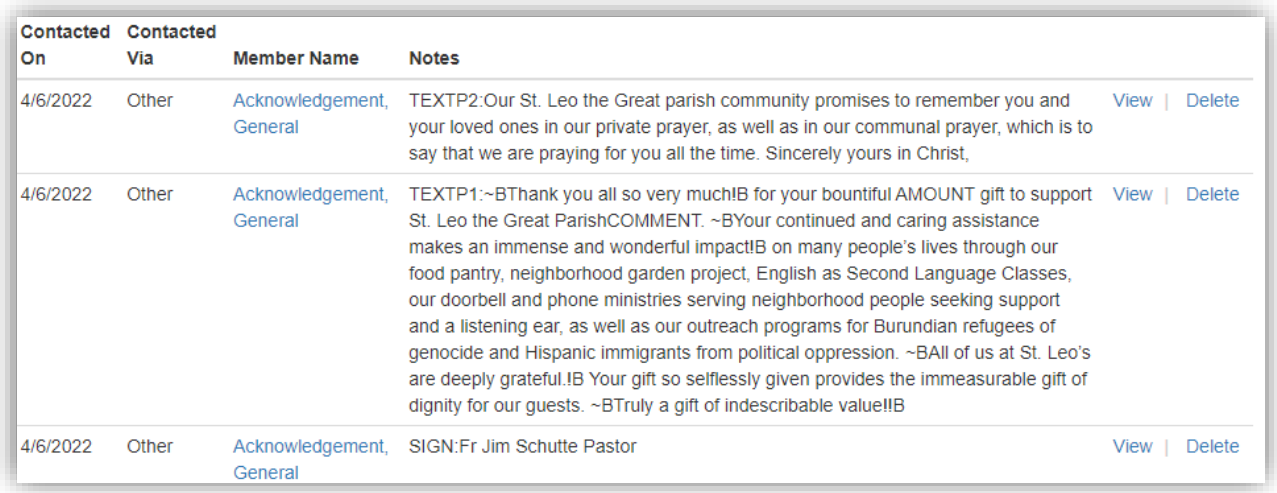
The date field can be changed from the default of 'today's date' if you're are back or forward dating the letters.

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	
4/6/2022	Other	Acknowledgement, General	TEXTP2:Our St. Leo the Great parish community promises to remember you and your loved ones in our private prayer, as well as in our communal prayer, which is to say that we are praying for you all the time. Sincerely yours in Christ,	View | Delete
4/6/2022	Other	Acknowledgement, General	TEXTP1:~BThank you all so very much!B for your bountiful AMOUNT gift to support St. Leo the Great ParishCOMMENT. ~BYour continued and caring assistance makes an immense and wonderful impact!B on many people's lives through our food pantry, neighborhood garden project, English as Second Language Classes, our doorbell and phone ministries serving neighborhood people seeking support and a listening ear, as well as our outreach programs for Burundian refugees of genocide and Hispanic immigrants from political oppression. ~BAll of us at St. Leo's are deeply grateful.!B Your gift so selflessly given provides the immeasurable gift of dignity for our guests. ~BTruly a gift of indescribable value!!B	View | Delete
4/6/2022	Other	Acknowledgement, General	SIGN:Fr Jim Schutte 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

Output…

