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

AOC03-ADMIN:Pledge Letters
Using the ADMIN Parish Staff family member 'Pledge', define letters for presenting status of promises to pay Tuition and Campaign Pledges. (bmaly 2022.03.11)
https://finance.catholicaoc.org/DOC/AOC03.pdf

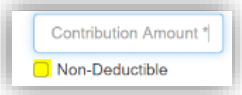
Description – For preparing Campaign Pledge or Tuition Due statements for mailing to parishioners.

Parameters:

- Church
- Form (multiple forms can be defined)
- Family Statuses
- Family Tags
- Fund
- Pledge Periods
- Donors
- Include Fully Paid?
- Suppress Details Page?
- Include Comments with details?
- Date
- Address to use
- Address format
- Format Options

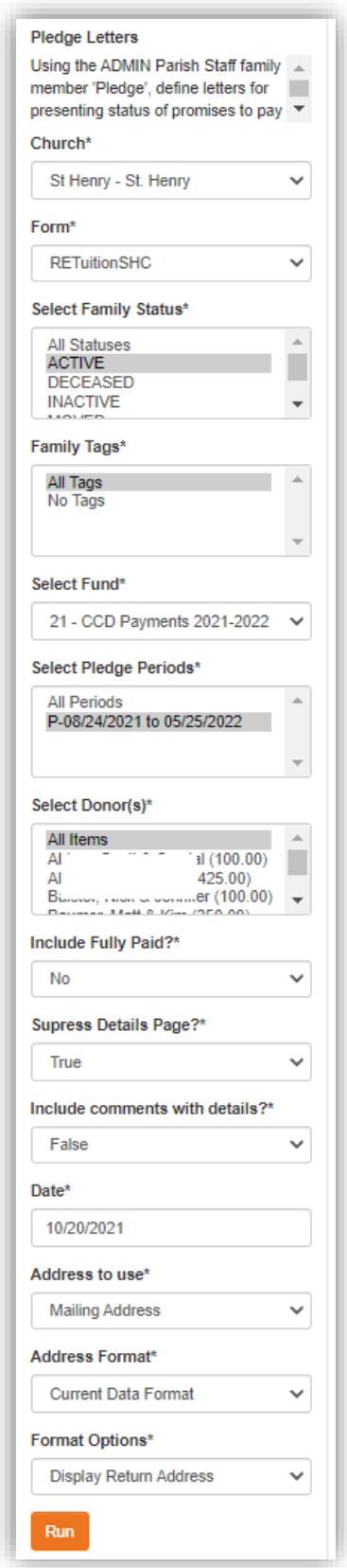
Purpose – Prepares statements for mailing to parishioners

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 - Diocese funds

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. Using this letter requires specific configuration of Funds and Pledges. For assistance with configuring funds with this report, contact Bill Maly 513.263.3354.



The letter prepares statements on status of pledge commitments. You can define multiple 'forms' using the ADMIN/PRM note process found below. Your parish ADMIN family has been preloaded with Tuition and Campaign Drive templates.

After selecting the Family Statuses and Tag Groups, any Fund which have been configured with pledge commitments will be presented. Selecting the fund will then identify all the commitment 'periods'. 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.

Each family letter includes a summary of the pledge, payments and remaining balance, and a tear off portion to be included with payment.

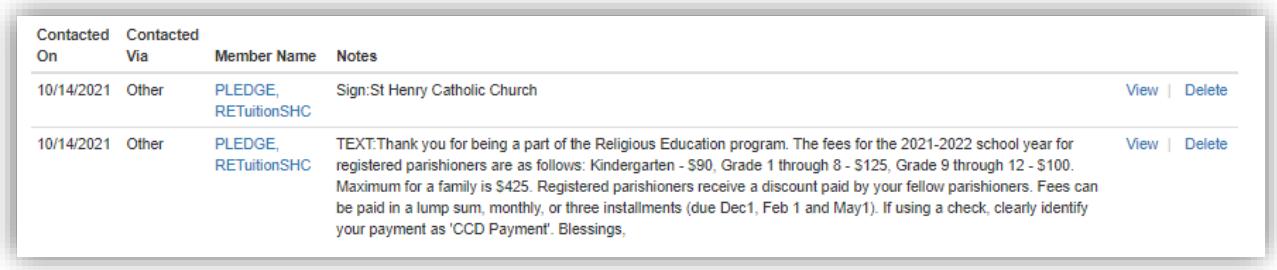
The date field can be changed from the default of 'today's date' if you're are back or forward dating the letters.

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.

THIS 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.



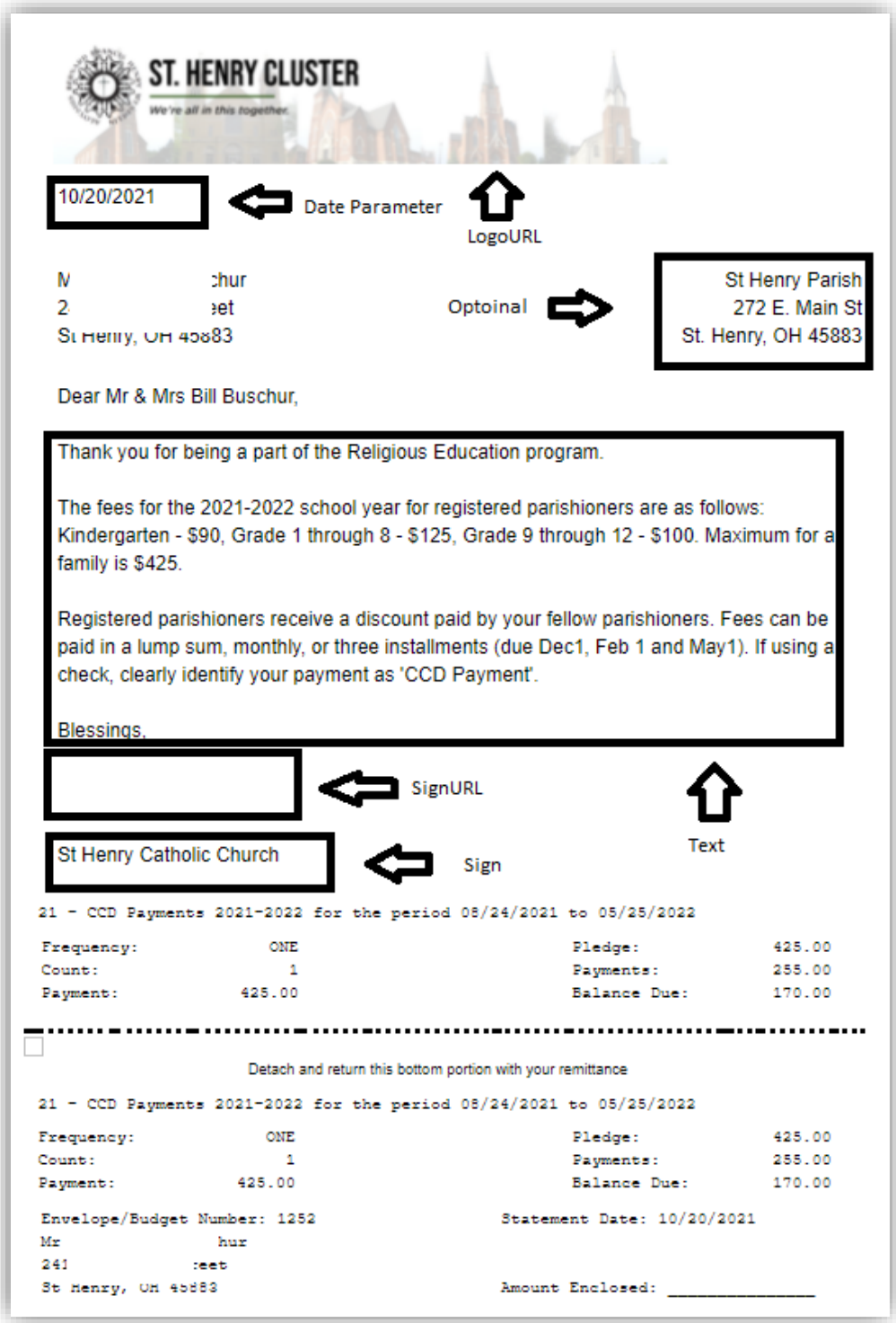
Contacted On	Contacted Via	Member Name	Notes	
10/14/2021	Other	PLEDGE, RETuitionSHC	Sign:St Henry Catholic Church	View | Delete
10/14/2021	Other	PLEDGE, RETuitionSHC	TEXT:Thank you for being a part of the Religious Education program. The fees for the 2021-2022 school year for registered parishioners are as follows: Kindergarten - $90, Grade 1 through 8 - $125, Grade 9 through 12 - $100. Maximum for a family is $425. Registered parishioners receive a discount paid by your fellow parishioners. Fees can be paid in a lump sum, monthly, or three installments (due Dec1, Feb 1 and May1). If using a check, clearly identify your payment as 'CCD Payment'. Blessings,	View | Delete

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

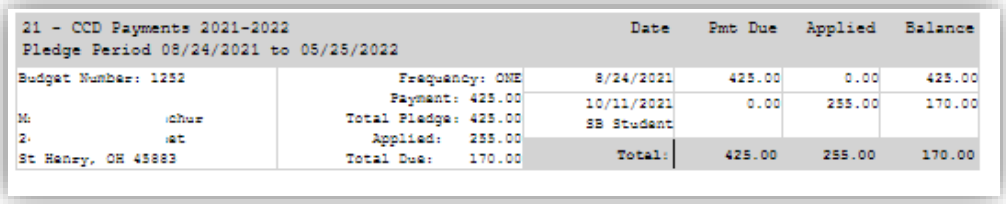
- A PRM note type of 'Other' with the first characters being 'TEXT:' is the content of the letter before the table showing giving summarized by fund.
  NOTES: for Text data
  For italic font use a 'tilde' +'I' before and an 'exclamation point' +'I' at end. sample
  For bold font use a 'tilde' +'B' before 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.



Optional payment details with running balance will print on page 2.



21 - CCD Payments 2021-2022
Pledge Period 08/24/2021 to 05/25/2022

Budget Number: 1252

M: chur
2 et
St Henry, OH 45883

Frequency: ONE
Payment: 425.00
Total Pledge: 425.00
Applied: 255.00
Total Due: 170.00

Date	Pmt Due	Applied	Balance
8/24/2021	425.00	0.00	425.00
10/11/2021 SB Student	0.00	255.00	170.00
Total:	425.00	255.00	170.00