Creating and Posting Offertory Batches – Detailed Method

Entering contributions by batches in Connect Now requires that you organize your contributions by fund prior to entering them in. It also requires you to have an overall “total” amount which you are expecting to enter into the system. You will enter this into the batch information when you set up the batch.

1) First, log into Connect Now and you will be at your typical homescreen:

![Connect Now homescreen](image1)

2) Next, click on Offering and then on Batches in the upper tabs. Your screen will be similar to below:

![Batches screen](image2)

3) Next click the Add Batch area listed below the Batch Management title seen in the screen shot below:

![Add Batch](image3)

4) The Create New Batch screen will appear similar to the screen below:
In the screen above you will enter in the details of your batch. Required fields are indicated by the red asterisk.

5) In the **Batch Description** field enter a name that will help you and others easily identify these contributions. We suggest using a date in this field to convey when the contributions were collected. Ex: 2014-08-15 Offering

6) In the **Fund** field, select the fund used by the majority of the contributions for this batch. (you can change the fund for individual contributions later during the entry process)

7) The date opened field is the date you created the batch.

8) In the **Cash Total** field enter in the total dollar amount of the contributions you added up earlier. (As you enter in each contribution later in the process, the Cash Balance amount will increase to indicate the total contributions entered into the batch.)

9) In the **Batch Type**, select the **Detailed Posting** option under the dropdown. Similar to the screen seen below:

10) Click **Add Batch** when finished entering in the essential information for your batch. The screen success message will display, as seen below. Click **Close** to close the window and move to the next step in the contribution posting process. *(Note: Do not click Close Batch, as that button is for after all your postings)*

11) You will be back at the **Batch Management** screen and will see your newly entered batch in the list of batches:
12) To post contributions to this batch, click on the Posting area below the Offertory tab, then select the Detailed Posting which we will be using for this batch.

13) The Contribution Posting area will show former data used in your previous posting sessions, so the data will need to be changed first thing in the Default Posting Data area seen below. Click on the arrow to the right of the batch description to select the batch you created.

14) The screen should refresh with your batch information now filled into the Batch Information area listed above the batch name. The Fund field to the right of the batch name will also auto fill with the default fund you selected for your batch.
15) Next, under the **Posting Filters** area, in the upper right section, select the family status & family group status for most of the parishioners of whom you will be entering in their donations. (Typically **Registered, All Groups**)

*(Please note that a family must already exist in the **Family Directory** in order to post contributions to that family. You cannot add new families or individuals within the contribution posting screen.)*

16) Go to the **Posting Options** area to define how you will post in this screen, typically you will Input for: **Family** and then select how you will be searching for the families, either by **Envelope number** or **Name**:
17) Now we are ready to enter in contributions. Under the **Posting** area seen below, highlight and change the date to the correct date for the postings in this batch. (typically the same date as in the batch name)
18) In the example below, we will use the envelope number to enter in the family’s contribution. Enter the number into the field called **Env#** and hit your **Enter** (or **Tab** depending on your internet browser) to advance to the next field. Make sure to look to the right to double check that the family’s information is filled in, as seen below:

Please note: if a family has a corresponding pledge for this fund, the information will appear in the circled area below.
19) Next, enter the amount of the donation, hit Enter (or Tab)
20) Enter the check number if applicable, hit Enter (or Tab)
21) Enter any Memo information if applicable, hit Enter (or Tab)
22) Your cursor will be on the Save area, hit Enter again and the contribution will post. Your screen will refresh and you will see the Last Contribution Posted will show the family you just entered in, as seen below:
23) Note, in the above posting, we just posted $30 to the family and now our **Batch Information** area correctly reflects that the **Balance** for the batch, which is the overall total of the batch, minus the donations you’ve posted to.

24) Continue with this entry process, adjusting the **Fund area** as needed if you need to apply the postings to a different fund than the original on the batch.

25) When all the contributions have been entered, the Batch information area should show a **Balance** of zero, as seen below:

26) If you have finished entering in donations and the balance is not zero then we will first go verify what was entered into the batch then correct and/or delete contributions.

1. To find out what was entered into the batch, under the **Offering** tab, select **Batches**.
2. Click on the box in front of your batch to select it from the list, then go to the **Quick Reports** area and then select **View Batch Detail Report** as seen below:
3. A popup screen should open which will show you details about what you entered into the batch.

4. To print this sheet, click the printer icon in the upper left corner. Or review it online, and click to the “next” pages by selecting the right arrow on the upper section. Close the window when finished by clicking the upper right X on the window. Next, check the contributions against this report, as this report shows the contributions from the most current recently entered to the last one. Highlight and make notations for all changes needed.

5. If you have a contribution you wish to edit, click on Offering tab then Contribution List you will see a screen similar to below:
6. Enter in the correct date range for the contributions entered in your batch, then click View Contributions.

7. Click on the “name” area of the contribution you wish to edit and you will see a screen similar to below:

8. You can change the batch this contribution is in, it’s fund, date, and/or amount. Enter in a Reason for the change and then click Save.

9. If you wish to delete a contribution, back on the Contribution List screen, click on the box in front of the contribution, then click the trash can icon as seen below:
10. When you get the **Delete Selected Contributions** warning screen, click Delete.

27) After correcting your batch so that the batch total balances, go to **Offering** then **Contribution List** where we will print off a date range contribution report that should match your deposit slip.

28) Enter in the date range for your batch, then click on **View Contributions**. Next, under the section on the right, click on **Quick Reports** then **View Date Range Postings** as seen below:

29) You will have a new popup window with the report showing what was entered on that date, which should correspond to what was entered into your batch. It will group all the contributions per fund, then alphabetically per the family name. This way, it will be easier to “find” information if you need to look at with the hard copy report. (if you need to come back to the report later)
30) Close the print preview window by clicking the red X in the upper right corner.

31) Next, click on the **Batches** area under the **Offering** tab. Your screen will be similar to the one below

32) To “close” your batch and make all your entries permanent. (You may wish to leave a couple batches open in the beginning when first learning the system.) Click on the box to the left of your batch description (seen below) to select your batch.
33) Next, click **Close Batch** button indicated above. You will get a message asking if you want to close the batch, as seen below:

34) Click **OK** to confirm the close, a status window will confirm that the batch was closed. If for any reason you feel you would wish to adjust either the batch information, dates or posted amounts, wait to close the batch.