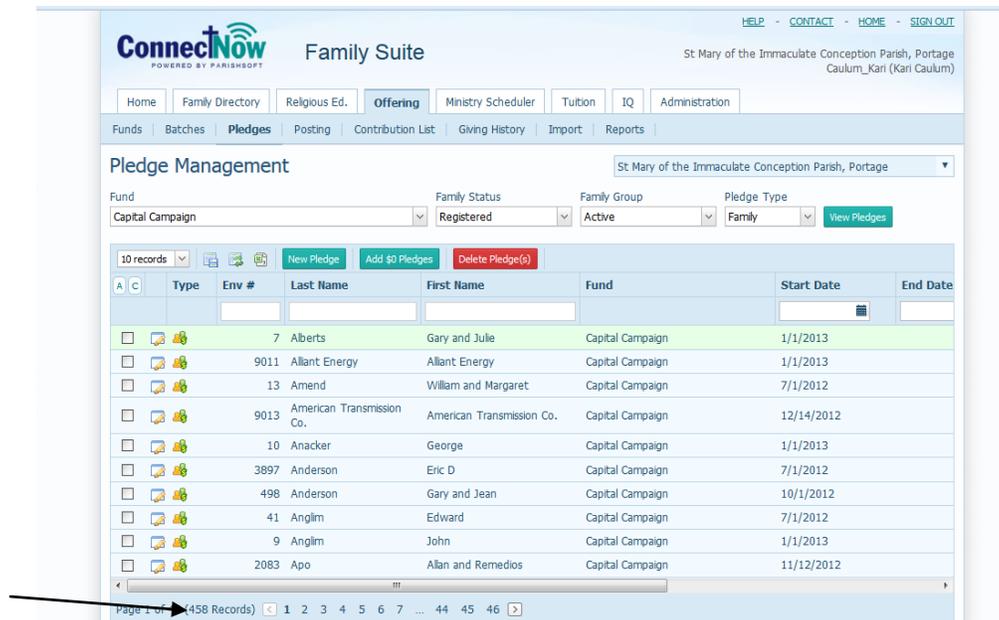


## Viewing pledges and printing reports on pledges in Connect Now

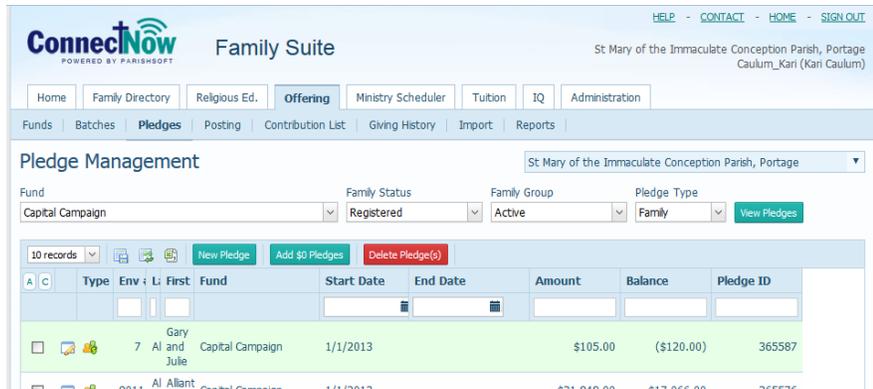
- 1) First, log into **Connect Now** and you will be at your typical homescreen:



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



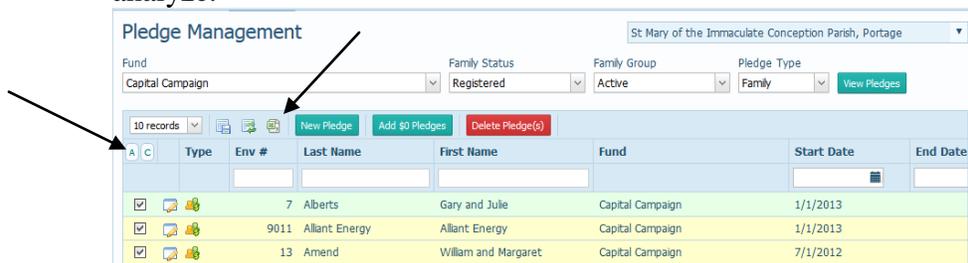
- 3) Under the **Pledge Management** header, you will want to select the fund which has your pledges. In the example above, we're looking at the **Capital Campaign**. Select also the **Family Status**, **Family Group** and **Pledge Type** if applicable. Please note that in the bottom page number you can see how many pledge records exist. (indicated above)
- 4) To view specific family's pledges, you can either click on the edit sheet,  or scroll over to the right side of the screen to see more details about the family's overall pledge and amount.



- 5) You can also choose to “drag & drop” columns in this screen, if you wish to see the pledge amount, balance, then family name. When you like the overall layout, click on the “Save Layout” icon so that the program will save your preference.



- 6) To print off an overall listing of all families, you’ll want to click on the **A** button in the upper header to select all families with a check mark (indicated below), then **click** the Export to .csv icon  to send the information into Excel to review and analyze.



- 7) The following Excel type of document will open with all the information on the pledging families:

Type	Env #	Last Name	First Name	Fund	Start Date	End Date	Amount	Balance	Pledge ID	Email	Address
Family	7	Alberts	Gary and Julie	Capital Camp	1/1/2013		\$105.00	(\$120.00)	365587		19 Por WI 53901
Family	9011	Alliant Energy	Alliant Energy	Capital Camp	1/1/2013		\$31,848.00	\$17,066.00	365576		19 Por WI 53901
Family	13	Amend	William and	Capital Camp	7/1/2012		\$1,000.00	(\$95.00)	365593		19 Por WI 53901

- 8) If you have a “family” where you wish to print off an overall status on their pledge, back in the **Pledge Management** screen in Connect Now, you can click the “edit” icon next to the family’s pledge information to view the pledge details, as seen below:

ConnectNow Family Suite  
St Mary of the Immaculate Conception Parish, Portage  
Caulum\_Kari (Kari Caulum)

Home Family Directory Religious Ed. **Offering** Ministry Scheduler Tuition IQ Administration

Funds Batches **Pledges** Posting Contribution List Giving History Import Reports

Pledge Management St Mary of the Immaculate Conception Parish, Portage

Fund: Capital Campaign Family Status: Registered Family Group: Active Pledge Type: Family View Pledges

10 records New Pledge Add \$0 Pledges Delete Pledge(s)

Type	Env #	Last Name	First Name	Fund	Start Date	End Date
	7	Alberts	Gary and Julie	Capital Campaign	1/1/2013	
	9011	Alliant Energy	Alliant Energy	Capital Campaign	1/1/2013	

- 9) A new screen will appear similar to below.

Edit Pledge (365584) Quick Reports

Pledge List Filters  
Organization: St Mary of the Immaculate Conception Parish, Portage Fund: Capital Campaign Family Status: Registered Family Group: Active

- Donor Record  
First/Last Name: American Transmission Co. American Transmission Co. Env #: 9013 Pledge ID: 365584 Phone #: Address 1: PO Box 408 Address 2: City/State/Postal: Unknown UNK 00000

Pledge Record  
Pledge Date: 12/14/2012 First Payment Date: 12/14/2012

Down Payment: \$ 0.00 Payment Type: 0 Check #: Post to: Entire Family Batch: None

Pledge Amount: \$ 250.00 Adjustments: \$ 0.00 Adjusted Balance: \$ 250.00 Total Paid: \$ 250.00 Balance: \$ 0.00

Frequency: One Time # of Months: 31 Payment Amount: \$ 250.00 Statement Months: Select All - Clear All  
Select each month a statement should be sent  
January April July October  
February May August November  
March June September December

Pledge Notes (3000 characters left) Reason (200 characters left)

Save Close

- 10) Next, in the upper right corner of the screen, click on the **Quick Reports** button and select **Pledge Details**. It will open a printable report of the overall status for this specific “family” which includes the pledge listed and any contributions made to the pledge.

ParishSOFT LLC (US) | https://connectnow.parishsoft.com/madison/ViewOfferingReport.aspx

Page 1 of 1

PDF

**St Mary of the Immaculate Conception Parish**  
 305 W Cook St  
 Portage, WI 53901

**Pledge for American Transmission Co. American Transmission Co.** Envelope Number : 9013

Pledged	Adjustments	Total Paid	Balance	Start Date	End Date	Batch	Fund
\$250.00	\$0.00	\$0.00	\$250.00	2012-12-14			Capital Campaign

**Contributions (1)**

Date	Amount	Check #	Contribution Type
2012-12-14	\$250.00		Cash

**Summary**

	Contributions	Transactions
Pledged	\$250.00	3
Posted	\$0.00	2
Balance	\$250.00	1

11) If you wish to see the same detail reports for a number of different pledging families, it is best to go back to our **Offering** tab and instead go to the **Reports** area.

ConnectNow  
 POWERED BY PARISHSOFT

Family Suite

HELP - CONTACT - HOME - SIGN OUT

St Mary of the Immaculate Conception Parish, Portage  
 Caulum\_Kari (Kari Caulum)

Home | Family Directory | Religious Ed. | **Offering** | Ministry Scheduler | Tuition | IQ | Administration

Funds | Batches | Pledges | Posting | Contribution List | Giving History | Import | **Reports**

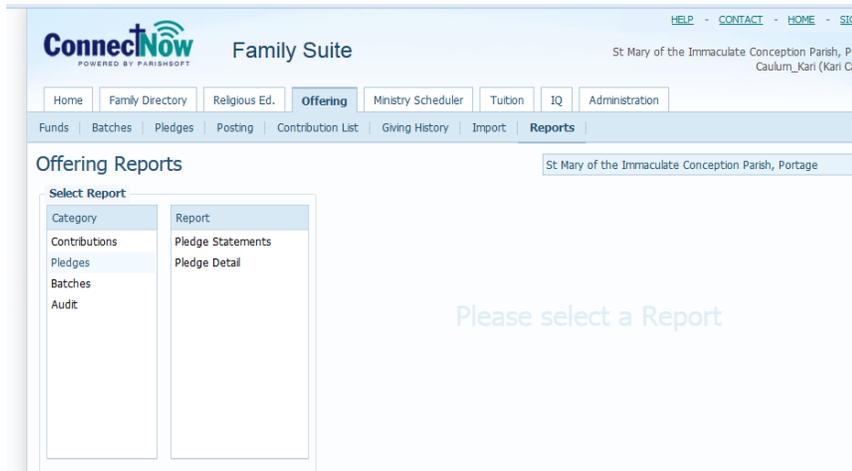
Offering Reports

Select Report

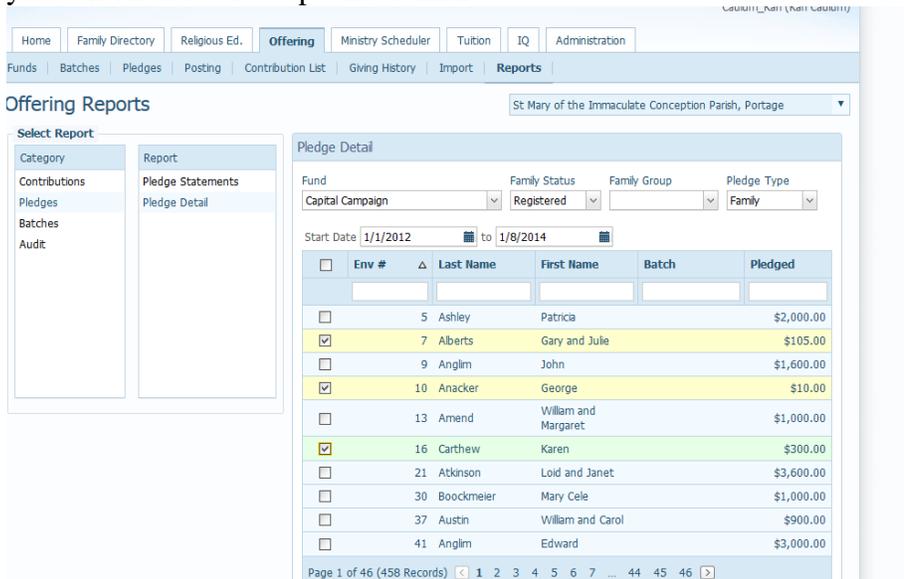
Category	Report
Contributions	
Pledges	
Batches	
Audit	

Please select a Category

12) In this reporting area, on the left side under the **Offering Reports** listing, you will click in the **Category** area and select **Pledges**



- 13) You will next click under the **Report** area and select **Pledge Detail**, then your fund, the date range. It will automatically select the number of pledges that fall into that date range. You can now either select “all” the families on the screen, or you can click to view specific families:



- 14) After you click the **View Report** button at the bottom on the right side, you will see the different families reports and have options to print all the families selected all at once.