



## PDS Bannon Offertory



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# **Bannon Offertory for Church Office**


The letters and listings in this program are based on an Offertory Program developed by ©Bannon Associates, Inc. Prior to printing the letters, Bannon Associates recommends an in-pew appeal where parishioners are encouraged to fill out commitment forms. The offertory letters are recommended as a response to those who have or have not completed the forms.

Before sending some of the letters, you need to enter the weekly offertory commitment amounts to the Family Fund windows using the Quick Posting of Terms and Rates Entry.

# Installation

Follow the installation instructions if you're installing on a new computer, if the reports have been damaged or modified, or if the installation process didn't work the first time.

1. Insert the Bannon Offertory CD into the appropriate drive.

 A window disclosing the contents of the CD may open. If so, close it.

2. In your PDS Church Office program, click **Reports > Contribution Reports > Financial Easy Reports**.

3. Click **Add > Custom Report**. The Add Custom Report Files dialog box displays.

4. From the **Look In** drop-down list, select the drive displaying the Bannon Offertory CD.

5. There are 14 reports included on the Bannon Offertory Reports CD. There are several files associated with each report that are copied onto your computer when you add a report.

6. To add a report, select the report and click **Open**.

The following reports are included on the installation CD:

File Name	Report	Description
Dates	Statistics Based on Dates	Two-year weekly comparison of contributions
First	First Monthly Reminder Letter	First reminder letter sent to families
Follow	Follow-up Letter	Follow-up letter
Gift	Gift Confirmation Letter	Gift confirmation letter
Qtrly	Quarterly Reminder Letter	Quarterly reminder letter
Same	"Stay the Same" Letter	Letters to families who have not pledged, assuming they will give the same as last year
Second	Second Monthly Reminder Letter	Second reminder letter sent to families
SPFirst	Primer Recordatorio Mensual	Spanish first reminder letter
SPFollow	Carta de Seguimiento	Spanish follow-up letter
SPGift	Carta de Confirmación	Spanish gift confirmation letter
SPQtrly	Formato del Rec. Trimestral	Spanish quarterly reminder letter
SPSame	Carta de "Permanecen Igual"	Spanish "stay the same" letter
SPSecond	Segundo Recordatorio Mensual	Spanish second reminder letter
WeekAve	Weekly Average List	Weekly average contribution of each family

# Bannon Offertory Predefined Letters

Although there are six predefined letters developed for this campaign, churches can modify them and add others as the campaign progresses.

## Modifying the Letters

To modify the wording of the letter, navigate to the Letter Layout window of the report and click **Modify the Text of the Letter**. The letter can be modified without changing the actual financial information. Financial information is inserted into the statement where the fields are displayed in the window between the < > brackets. For example, **<Fund Totals Grand Total Due>** prints the total pledged. Click **Insert Field** to select a particular field, or enter the new fields available for these reports.

There are two fields available to insert into these letters that aren't available in the regular Church Office Financial Easy Letters:


- **<New Field Week Ave>** adds the donations for the **Date Range** and **Funds** on the Funds To Print window and divide by the number of weeks.
- **<New Field Wks>** calculates the weeks that the family has pledged towards for the **Date Range** requested on the Funds To Print window. For example, if a family started pledging after the start of a quarter, it only prints the number of weeks that the family has pledged towards.



These fields are not listed under the **Insert Fields** options in the Modify the Text of the Letter window.


# The Follow-Up Letter

The Follow-Up letter is sent to those who did not complete an in-pew commitment form. Run this letter after you enter your pledge drive information from the commitment forms. You can use selections to print only those families who haven't made a commitment.

1. Click **Reports > Financial Easy Reports**, and select a listed report.
2. Click **Next** until you reach the Set the Letter Layout window.
3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range of the current offertory campaign. Click **Next**.
6. In the Select the Families window, click the **Additional Selections** tab. Add the following condition:  
**CalcFund.TotalPledged is equal to 0.**
  -  This prints only those who have not made an offertory commitment as entered on the Terms and Rates tab in the Families tab group.
7. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
8. Click **Preview** to run the report.

# The Gift Confirmation Letter

The Gift Confirmation letter is sent to those who completed an in-pew commitment form. Run this letter after you enter your pledge drive information from the commitment forms. You can use selections to print only those families who have made a commitment.

1. Click **Reports > Financial Easy Reports**, and select a listed report.
2. Click **Next** until you reach the Set the Letter Layout window.
3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range from the beginning of the current year's offertory fund to today's date. Click **Next**.
6. In the Select the Families window, click the **Additional Selections** tab. Add the following condition:  
**CalcRate.StartDate is greater than or equal to MM/DD/YYYY**
  -  This prints only those people who have started the offertory pledge after the date as entered on the Terms and Rates tab in the Families tab group. Use a cutoff date after the last time you ran the report so the program will exclude those families that have already received this letter.
7. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
8. Click **Preview** to run the report.

# The "Stay the Same" Letter

The "Stay the Same" letter is sent to those who did not complete an in-pew commitment form after they received a follow-up letter. Use selections to print only those families who haven't made a commitment.

**i** The average amount printed in this letter is calculated using the **<New Field Week Ave>** command in the body of the letter. This amount is not automatically posted to the family's fund window, so you must enter it. Run the Offertory Weekly Average List to use as a reference during the Terms and Rates Entry quick posting.

1. Click **Reports > Financial Easy Reports**, and select a listed report.
2. Click **Next** until you come to the Set the Letter Layout window.
3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range from the beginning of last year's offertory fund to today's date. Click **Next**.
6. In the Select the Families window, click the **Additional Selections** tab. Go to the next page to view the recommended selections.
7. For this selection, click **All** and change it to **None**. Add the following condition: **CalcRate.StartDate is greater than or equal to MM/DD/YYYY**, where MM/DD/YYYY is the first day of the current offertory fund. Add another condition: **CalcFundMonth.Paid is equal to 0**. This prints only those people who started the offertory pledge after that date as entered on the Terms and Rates tab in the Families tab group or who haven't given any contributions.

**i** You can select a higher cutoff than people who gave more than \$0. For example, if you don't want to print families who gave less than \$5.00 per week, you can change the second condition. The annualized amount for \$5.00 per week is \$260.00 (52 weeks X \$5 = \$260), so you change the entry on condition 2 to **CalcFundMonth.Paid is less than 260**.
8. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
9. Click **Preview** to run the report.



# The First Monthly Reminder Letter

The First Monthly Reminder letter is sent to those who haven't been keeping up with the offertory commitment as entered on the family fund window. You can use selections to print only those families.

**i** In this letter, MM/DD/YY is the date that the family started the individual commitment as entered on the fund window. The dollar amounts and weeks are also inserted into the letter based on the information you entered in the family fund window.

1. Click **Reports > Financial Easy Reports**, and select a listed report.
2. Click **Next** until you come to the Set the Letter Layout window.
3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range from the beginning of the current year's offertory fund to today's date. Click **Next**.
6. In the Select the Families window, click the **Additional Selections** tab. Add the following condition:  
**FundTotals.GrandTotalBalance is greater than 0.**


**i** This prints only those who have pledged towards offertory as entered on the Terms and Rates tab in the Families tab group and haven't paid off the pledge through this point in time (they have a balance).

The cutoff amount for **FundTotals.GrandTotalBalance** can be set higher if you want to leave out people who have nominal balances. If a family committed to giving \$5 per week (\$20), but gave \$17, do you want to send a letter? This varies from church to church, but if you want to exclude those who were only off by \$5 or less, enter the condition **FundTotals.GrandTotalBalance is greater than 5.**


7. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
8. Click **Preview** to run the report.

# The Second Monthly Reminder Letter

The Second Monthly Reminder letter is sent to those who haven't been keeping up with the offertory commitment as entered on the family fund window. You can use selections to print only those families.

 In this letter, MM/DD/YY is the date that the family started the individual commitment as entered on the fund window. The dollar amounts and weeks are also inserted into the letter based on the information you entered in the family fund window.


1. Click **Reports > Financial Easy Reports**, and select a listed report.
2. Click **Next** until you come to the Set the Letter Layout window.
3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range from the beginning of the current year's offertory fund to today's date. Click **Next**.
6. In the Select the Families window, use selections similar to the one you used for the First Monthly Reminder Letter. Click the **Additional Selections** tab, and add the following condition:  
**FundTotals.GrandTotalBalance is greater than 0.**


 Since you are looking at two months, you can adjust the cutoff amount used for the balance, depending on your church's preference.

7. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
8. Click **Preview** to run the report.

# The Offertory Quarterly Reminder Letter


The Offertory Quarterly Reminder letter is sent to those who have had the offertory commitment entered on the family fund window. You can use selections to print only those families.

 In this letter, MM/DD/YY is the date that the family started the individual commitment as entered on the fund window. The dollar amounts and weeks are also inserted into the letter based on the information you entered in the family fund window.

1. Click **Reports > Financial Easy Reports**, and select a listed report.
  2. Click **Next** until you come to the Set the Letter Layout window.
  3. If you want to make changes to the letter, click **Modify the Text of the Letter**. Make your changes, then click **OK** to return to the window.
  4. Make sure you have selected the proper options for letterhead, closing, margins, and so on. Then click **Next**.
  5. In the Funds to Print window, enter your offertory fund (usually fund 1) and the date range from the beginning of the current year's offertory fund to today's date. Click **Next**.
  6. In the Select the Families window, use selections similar to the one you used for the First Monthly Reminder Letter. Click the **Additional Selections** tab, and add the following condition:  
**FundTotals.GrandTotalBalance is greater than 0.**
-  Since you are looking at three months (one quarter), you can adjust the cutoff amount used for the balance, depending on your church's preference.
7. To save this selection, click the **Selection Information** tab, then click **Add**. A new item titled **New Selection** is created under the List of Selections. You can rename this selection in the Name field under Select Information.
  8. Click **Preview** to run the report.

# Spanish Offertory Letters

The Church Office version of the Bannon Offertory Reports provides six recommended letters translated into Spanish. The Archdiocese of Portland kindly provided the translations of the letters, and we have inserted the financial information.

 Since PDS is not staffed to provide services in Spanish, we cannot offer translated instructions or support for these letters. For a listing of the Spanish reports and the English equivalent, see [Installation](#).

## Producing Bilingual Letters

There are several ways to produce bilingual letters in the PDS Church Office program.

### Option 1

Some churches preferred to double-side the letters: one side English, one side Spanish. If you do this, use the exact same selections for the English and Spanish versions so that the same family is on the front and back of each page.

### Option 2

Use selections for each group to print separate runs for English and Spanish letters.

If you use a family keyword or the member language keyword to designate Spanish-speaking members, you can add another selection criteria when you run the letters. You can use the following conditions to print the Gift Confirmation Letter in Spanish (Carta de Confirmación) for families that have at least one member who speaks Spanish: **CalcFund.Total Pledged is equal to 0** and **Mem.Language is equal to Spanish**.

If you use **Keywords.Description=Send Spanish Letters**, it prints a letter for families with that keyword, assuming that you entered this information in family windows.

### Option 3


Modify the text of the letter to print different sections based on member language. Under **Modify the Text of the Letter**, you can enter commands to tell the program which text to print based on the language entered on the member windows. Be sure to create Spanish versions of the inside address and closing, then select them in the Set the Listing Layout window.

The advantage of this process is that you don't have to run two separate reports, since the same letter prints both versions.

# Other Offertory Reports

## Offertory Statistics Based on Dates

This report generates offertory comparisons for semiannual date range(s) between two years. This prints specific monthly cutoff and submission dates recommended by Bannon Associates, Inc. This report compares the current year's weekend (Sunday Offertory) donations to last year's weekend donations, to confirm an expected increase in revenue due to the Parish Offertory Program.

1. From the main menu, select **Reports > Financial Easy Reports > Offertory Statistics Based on Dates**.
2. Click **Next** until you come to the Options window.
3. Select whether to include gift or credits with the payments. Select when you want to start the second year for comparisons. Click **Next**.
4. In the Funds To Print window, select a date range that begins with the previous year that you want to compare.
  -  For example, if you want to compare the year starting with 07/01/2021 to the year starting with 07/01/2020, your starting date is 07/01/2020. The ending date is determined by how many months you want to compare. In the same example, if you want to print six months, the ending date is 12/31/2021.
- If you've used the Census 17.4 version of these reports, you are no longer restricted by preset dates.
5. Click **Next** to go to the Select the Families window. This report requires no special selections.
6. Click **Preview** to run the report.

## Offertory Weekly Average List

The Weekly Average List prints a list of the average weekly contribution for the fund and date range requested. It's an easy reference for entering the weekly commitment for those families that haven't submitted a commitment card.



1. From the main menu, select **Reports > Financial Easy Reports > Offertory Weekly Average List**.
2. Click **Next** until you come to the Funds To Print window. Select the fund and date range of last year's offertory through to today's date.
3. Click **Next** to go to the Select the Families window. Use the same selections you used for The "Stay the Same" Letter.
4. Click **Preview** to run the report.

# Fund Tips and Troubleshooting

This section is an overview of fund setup and fund entry. For those who entered pledge drive information, much of this information is a review since some of the same processes apply.

## Setting Up a Charge

The data entry for the Offertory Program is done in your Sunday Offertory Fund (fund 1). People commonly feel that, because they've never used the Offertory Fund for "pledging", that the Offertory Program should be done separately. For the purposes of these reports, record all offertory information in fund 1. However, if you never used fund 1 for pledging, you can add a charge to your fund 1. The program cannot post "pledges" unless at least one charge activity is available. After you have checked for this, you can then start entering the weekly commitments.

1. From the main menu, click **Fund Setup** to view fund 1.
2. In the list of fund activities, look for an entry marked **Charge**. If there is a charge, you can skip this procedure. Otherwise, go to the next step.
3. At the top of the grid, click the add icon . When prompted to insert a predefined group, click **No**.
4. Under Activity Name, enter "Offertory Pledge" (or another name you want). Under Function of Activity, select **Charge** from the drop-down menu, and click **Save**.
5. Optionally, to create a balance activity, repeat Step 4 and enter "Offertory Pledge" for the Activity Name and **Balance** for the Function of Activity
6. Click the reorder icon . Click your new activity and move it just above your offertory payment activity.
7. Click **Save/OK**.

## Quick Posting

Once you have a charge set up, you can post the amounts from commitment cards and the Offertory Weekly Average List. The program has a quick posting for Terms and Rates Entry that will make this task easier. The steps below are summarized to fit the Offertory Program.

1. On the Contributions window, click **Quick Postings > Terms and Rates Entry**.
2. Select **Use the Individual Entry method to select one family at a time**, and click **Next**.
3. Enter the offertory fund number and billing range, then enter the family name or ID.



- Although you can enter other information as well, you only need to fill out the Recurring Charge, Terms, and Rate.
- The recurring charge can be any charge used in the offertory fund. If none is available through the drop-down list, please refer to the previous procedure to add a charge to the fund.
- The terms should be **Weekly on Sunday** to fit the pattern of offertory giving.
- The rate will come from either pledge cards returned by parishioners or from the Offertory Weekly Average List for those who did not pledge.

4. When you complete the financial information for a family, click **Add Family to List** to enter the next one.
5. When you're finished adding names, click **Next**.



At this point, no pledges have been entered into the data. If you click **Cancel**, the entries are not posted. You can recheck your entry and edit if necessary.

6. After you verify the entry, click **Next** and then **Finish** to post the entries.

## Troubleshooting

If the program shows that a family owes an extra week's worth of offertory on the letter, go to that family's Contribution window and look up the offertory fund for the current year. Click **Terms & Rates** and make sure that Terms is set to **Weekly on Sunday**, not just weekly. Before you change it, make note of the original rate. You will have to correct the rate because the program will recalculate the rate based on the old (incorrect) total.