# Memorial Contribution Tracker
Version 2.0

Summary:

The Memorial Database is designed to track larger memorial contributions made to the parish. There can be multiple funds tracked, both short term and long term. For example, your parish may have a *general fund* to accept donations as a memorial for a deceased loved one. This would be an ongoing long-term fund. Your parish may also have a short term need such as a collection for a current natural disaster. This would be for short term tracking but still needs to be acknowledged.

This system will track the contributions over time; provide thank you letters, and year-end tax letters. This is an add-on program and is linked to the main census program.

Main Screen:

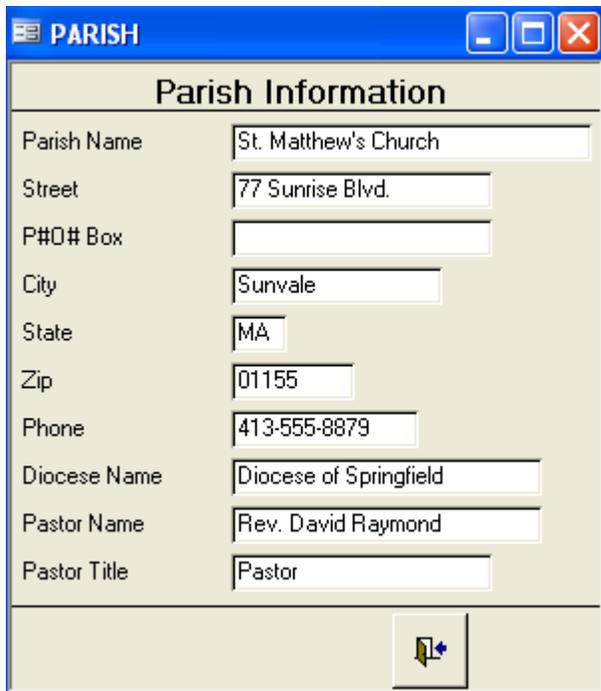From the main screen, you can choose the options you need.
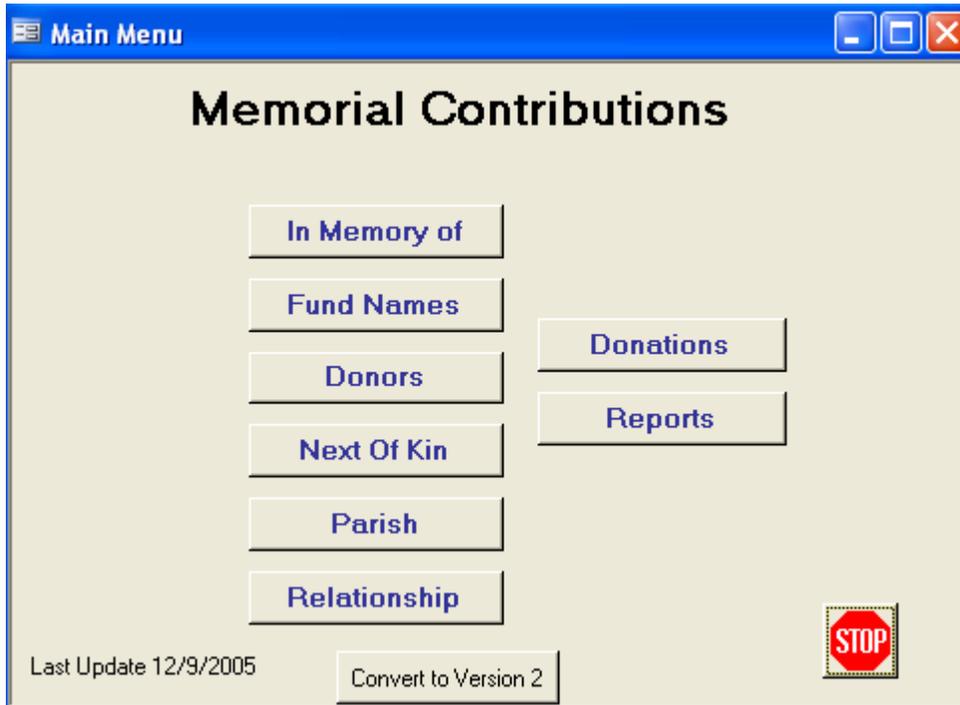
We will discuss each selection in the following sections.

Setup:

Parish:

This is a one-time setup, and can be edited if the need arises. Enter your parish name, address and telephone number, as well as the pastor's name. This information will appear on reports and letterheads.

Fund Names

Use this screen only when entering a *new* fund name. Initially you would enter the fund(s) that are currently available for receiving donations.

At any time in the future, you can return here and add new funds. Simply click in the last empty selection box and begin typing. A new empty box will appear at the bottom of the list, ready to accept your next entry. Click on the door icon to close the screen.

NOTE: Once you begin entering contributions, do not change or delete a fund name unless you are certain it is empty. This will cause the data to be misplaced or even lost.

Relationship

This is also a one-time set up. It is used to identify the relationship of the "Next of Kin" to the person the donation is made "In Memory of".

We use standard relationship codes so that the donation letters can look uniform.

In the event you need to add a new Relationship, simply scroll to the bottom of the list. Enter a one- or two-character code not already in use, press TAB, and enter the new relationship to the list.

A word of caution: once you begin using the database, do NOT change or delete any of the codes. You risk losing the connection between your information fields as described above.
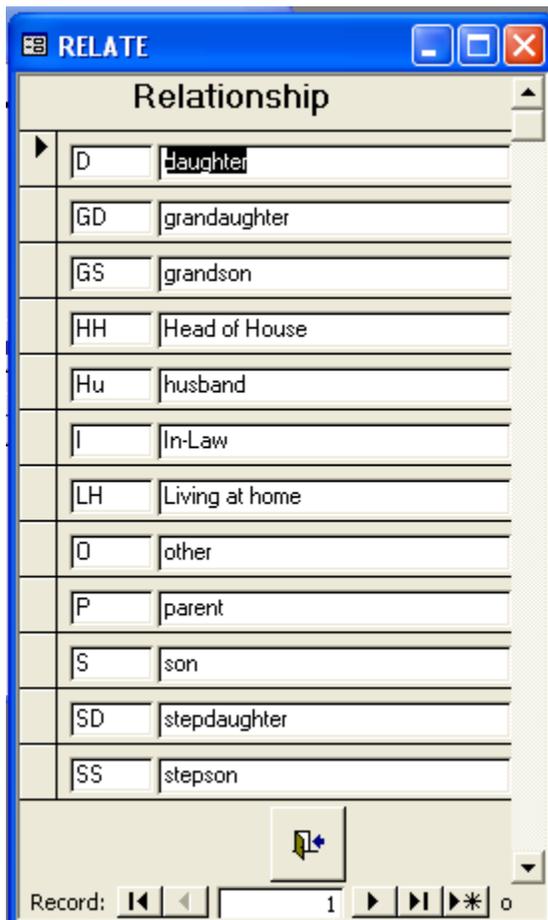
Code	Relationship
D	Daughter
GD	grandaughter
GS	grandson
HH	Head of House
Hu	husband
I	In-Law
LH	Living at home
O	other
P	parent
S	son
SD	stepdaughter
SS	stepson

Function Buttons

The next three buttons described can be used from either the *main screen* or the *donations screen,* and using the corresponding "add" function.

You are required to enter information for each "Donor", "In Memory of" and "Next of Kin". The purpose is for standardization, allowing a letter to go out to the "Donor" listing all donations they have made in a given period regardless of who they are for, or the "Next of Kin" regardless of who made the donation.

In Memory of
This simply requires a name, so that spelling is the same on all communications.

Donor

This is the person making the donation. If the donor is a parishioner, you can locate them using the Census Lookup drop-down list. Be sure to add any missing information. The complete address is required so that a *thank you* and *tax letter* can be sent.

Please note: if an address has been changed, you must change it in the main Census program. Making a change here will NOT be recorded in the census program.

Next of Kin

These are the persons related to the deceased. The next of kin listed here will be notified regarding all donations.

It is possible to have more than one "Next of Kin" for the same "In Memory of".
For example,

a friend of the **son** of the deceased makes a contribution and wants the son to be notified.

In addition, a friend of the **daughter** makes a donation and wants the daughter to be notified. In each case, the *In Memory of* and *Next of Kin* are matched up for each individual donation.

Donations

As each donation is recorded, at minimum you must enter a Donation Date, Fund Name, Donor and Amount or it will never show on a report. If it is truly a memorial contribution then the "In Memory of" must be entered along with the "Next of Kin" or no one will be notified concerning the donation.

The Donation ID is generated automatically by the computer. This is used to control the number of records you may want to print. Leaving the default numbers, you will get all records.

If you do not find the name you need in the drop down list, you can add the information by using the appropriate "Add" button. After adding, you may need to press "Refresh" for the name to appear in the drop down. These lists are built when you first enter the screen and will not show new names added without being refreshed.

You can return to this screen to indicate that a *Thank You to Donor* and/or *Family Letter* has been sent, and indicate the week the acknowledgement appeared in the bulletin.

A comment field is available if you need to add an explanation or clarify something related to the donation. This comment will appear on appropriate reports.

YTD Letter

This will bring up an Access report for all donations made by the donor on the current screen for the year listed on the donation date. It is not just for this donation but all donations during the year.

Word

This will export the YTD letter to Microsoft Word, if you have Word on the machine. Open Word so that you can edit the letter.

Sample letter:

January 12, 2006

Mr. & Mrs. Donald August
51 Sunrise Dr.
MyTown, MA 11025

Dear Mr. & Mrs. August:
   The community of St. Matthew's Church acknowledges your tax-deductible contribution(s) to the following funds for the year of 2006.

Donation date:	Fund Name:	Amount:
1/12/2006	Restoration Fund	$5,000.00
Total for Period:		$5,000.00

No goods or services were provided, in whole or in part, for this contribution.

Sincerely yours in Christ,

Rev. David Raymond
Pastor

Utility button

Convert to new version

This button will help you keep your data current when we update the program. Simply press the button and fill in the requested information. If the data has been converted, the screen will give you the date and initials of the person who performed the conversion.

Reports

There are a variety of reports and formats all of which you can access from the "Report" menu:

Report by Donor / Date / Fund – All

This requires you to enter a date span and choose a fund name. I.D Span will give you the option to control the number of entries you print. If you leave the default numbers, you will get all records. It will then produce a report based on that criteria and show:
- Date Span requested
- Fund Name
- Date Received
- In Memory of Name
- Next of Kin Name and Address
- Donor Name and Address
- Amount received and total for period
- Thanks you sent to donor
- Family letter sent
- Week appeared in bulletin

This will appear in print preview for viewing before you send it to the printer.

Report by Donor > $250

This report requires a date range and shows all funds for that range sorted in date order. The intention of this report is to show Donors who have contributed more than $250 in a single donation. It will show:
- Date Span requested
- Fund Name
- Date Received
- Donor Name and address
- Amount received and total for period
- Thanks you sent to donor

This will appear in print preview for viewing before you send it to the printer.

Report by Donor All

This requires you to enter a date span. It will then produce a report based on that date span and show all funds sorted in date order with this data:
- Date Span requested
- Fund Name
- Date Received
- In Memory of Name
- Next of Kin Name and Address
- Donor Name and address
- Amount received and total for period
- Thanks you sent to donor
- Family letter sent
- Week appeared in bulletin

This will appear in print preview for viewing before you send it to the printer..

Donation Summary

This requires you to enter a date span. It will then produce a report based on that date span showing all funds sorted and totaled by donor. It is in date order within donor with this data:

- Date Span requested
- Fund Name
- Date Received
- In Memory of Name
- Next of Kin Name and Address
- Donor Name and address
- Amount received and total for period
- Donation Comment
- Thanks you sent to donor
- Family letter sent
- Week appeared in bulletin

This will appear in print preview for viewing before you send it to the printer.

Family Letter

This letter is produced in two formats. The first is an Access report, which cannot be modified, and the second format is the Access report exported to Microsoft Word. If you have Word on your computer, you can modify the letters in this format prior to printing.

This letter requires a data span. It is addressed to the next of kin showing all the donations made in memory of their relative during that date span. It will show the donor's name and address but not the amount of contribution.

Tax Letter

This letter, like the family letter, can be produced in two formats. The first format is an Access report, which cannot be modified; and the second format is the Access report exported to Microsoft Word. If you have Word on your computer, you can modify the letters in this format prior to printing.

This letter requires a data span. It is addressed to Donor and shows all the donations made by that donor during that date span. It will show the date, the fund name and the amount as well as a total for that period.

Family Letter (Col)

This is the same as the Family Letter, but the donors appear in two columns, which is useful when there are a large number of donors.

Export to Excel

All of the Excel exports are here for more advanced users. This will allow you to export certain data to an Excel spreadsheet. This spreadsheet can then be used to merge into a custom work document that you create. This gives you complete flexibility in the format of your letters.

Export by date

This will export the data to the spreadsheet:
c:\census\FamilyLetter.xls
If the sheet already exists you may receive a message to overwrite it. As long as you are done with the previous merge just answer yes.

This export requires a date span or there will be no data in the spreadsheet. The fields exported are (in this order):

- Donation id (system generated number of the donation)
- Donation date
- Fund Name
- In Memory Of (name)
- Next Of Kin (Number only, name will also be exported)
- Relationship
- Donor (Number only, name will also be exported)
- Amount
- Thank you to Donor (yes or No)
- Family Letter (yes or no)
- Week In Bulletin
- Donation Comment
- NOK Salutation (NOK = Next of Kin)
- Next of Kin Name (formatted salutation, first and last name)
- NOK Last name
- Donor Salutation
- Donor first name
- Donor Last name
- Donor Name (formatted salutation, first and last name)
- Donor Street
- Donor PO Box
- Donor City (formatted city, state and zip)

- NOK (next of kin) first name
- NOK Street
- NOK PO Box
- NOK City (formatted city, state and zip)
- Parish Name
- Pastor Name
- Pastor Title
- Donation date

Export Fund

This will export the data to the spreadsheet:
c:\census\FamilyFund.xls
If the sheet already exists you may receive a message to overwrite it. As long as you are done with the previous merge just answer yes.

This export requires a date span and a fund name or there will be no data in the spreadsheet. The fields exported are the same as the Export by Date.

Export IMO (In Memory Of)

This will export the data to the spreadsheet:
c:\census\FamilyLetterIMO.xls
If the sheet already exists you may receive a message to overwrite it. As long as you are done with the previous merge just answer yes.

This export requires a date span and In Memory Of selection or there will be no data in the spreadsheet. The fields exported are the same as the Export by Date.