Pledge Tracker

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System Overview

This system is designed to track long-term pledges.
It can be used for multiple drives simultaneously.

For each drive it will:

- keep track of the Start and End date and
- Total Contributions to date.

Within the drive it will:

- record pledges for each family and
- the frequency they are to make payments.
- Post payments to that pledge.
- Display a status screen with the current state of each pledge.
- Produce printed statements.

Setting up a drive

From the main Drive Management screen select Drive Input and you will get this screen:

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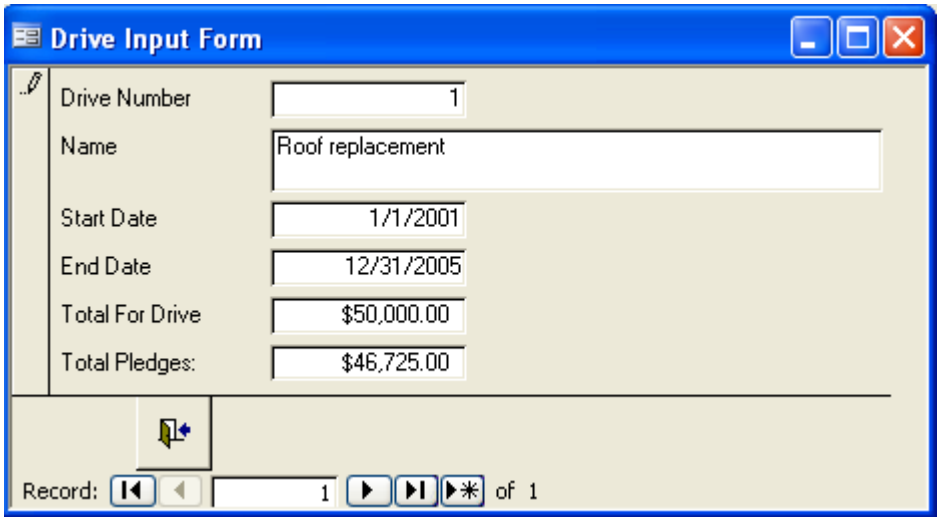

To add (create) a new drive use the new VCR button (>*) and a blank screen will appear. The drive number is automatically generated. You need to enter the Name of the drive and the Start and End dates.

The Total for Drive is updated by the system. It is NOT used to record the goal of the drive.

Updating drive information

Selecting the **Update Drive** button tells the system to update the duration of the drive, and the total payments to date. The duration is used to calculate the required payment amount for pledges so this button *must* be pressed *after setting up a new drive* or *changing the start and end dates.*

Update will:

1. Calculate the duration in months to be used later with the frequency and total pledge to calculate payment amount.
2. Total all *payments* for each drive and place in "Total for Drive" box.
3. Total all *pledges* for each drive and place in Total Pledge box.

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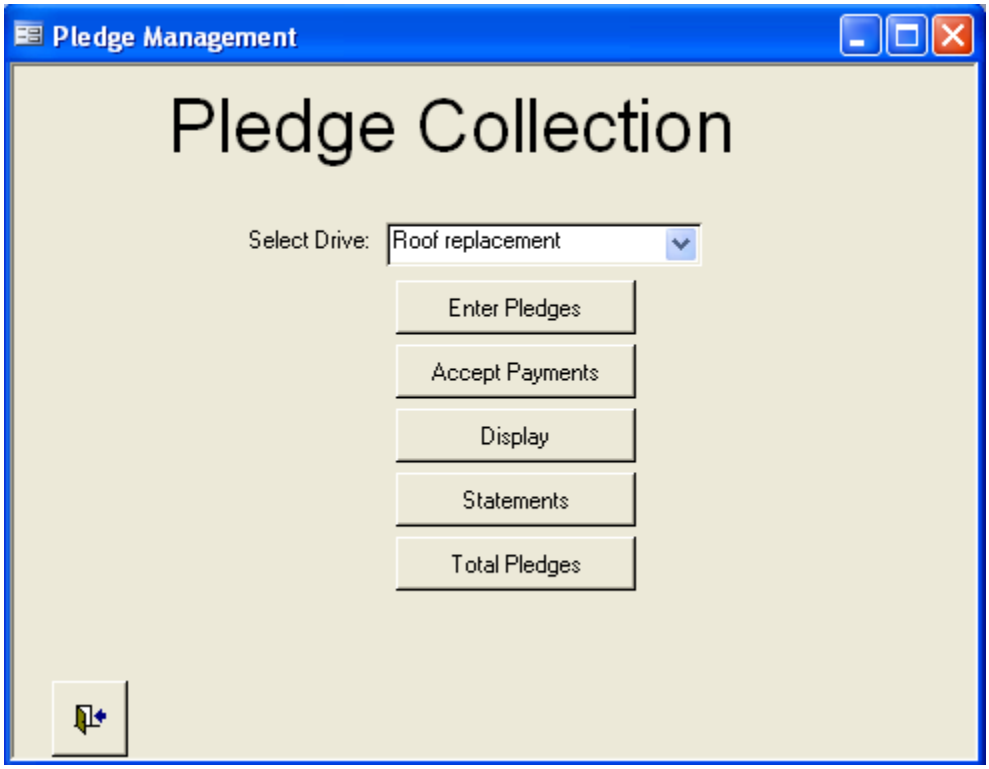
Pledge Collection

Select Pledge Collection from the Drive Management screen and this screen appears.

Select the drive to work on, then choose one of the options shown.



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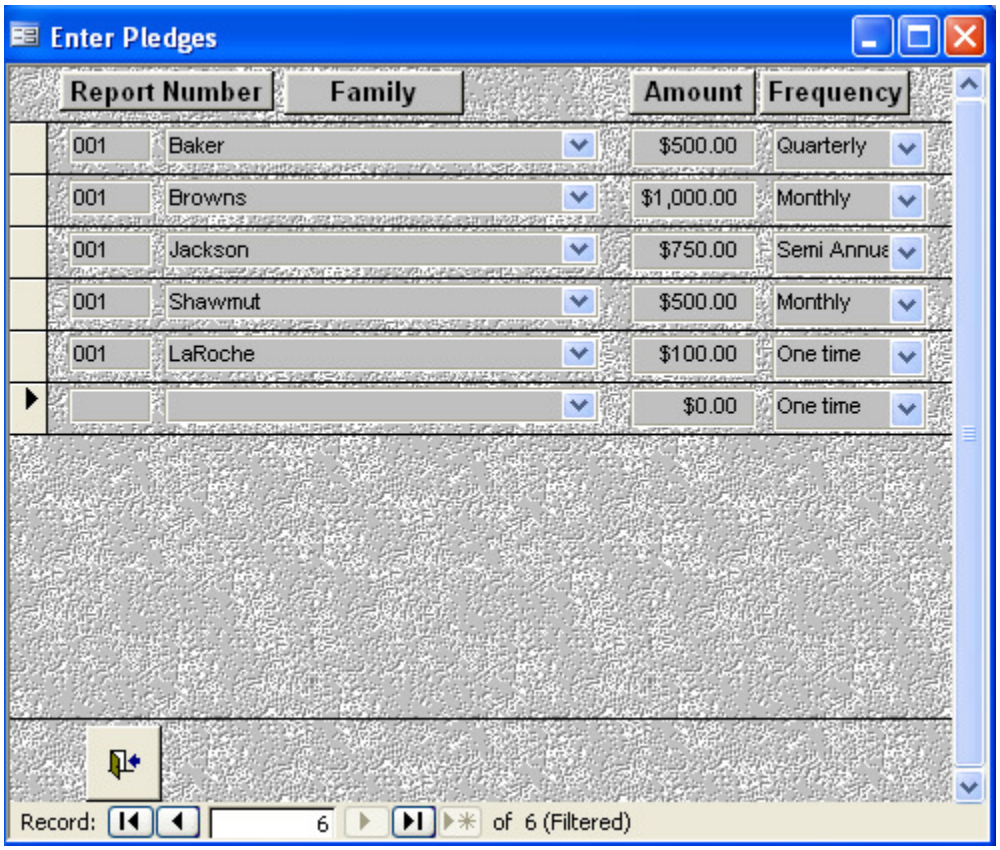
Enter Pledges

Choosing this option gives you the following screen.



Entering Pledges

Enter the Report Number.

Report Number identifies each Collection or Report period.

The numbers you use are of your choosing.

Select the Family Name from the drop-down list.

Enter the Amount of the pledge, and select the Frequency from the list.

Each time you add a pledge a new blank line will appear at the bottom to enter another one.

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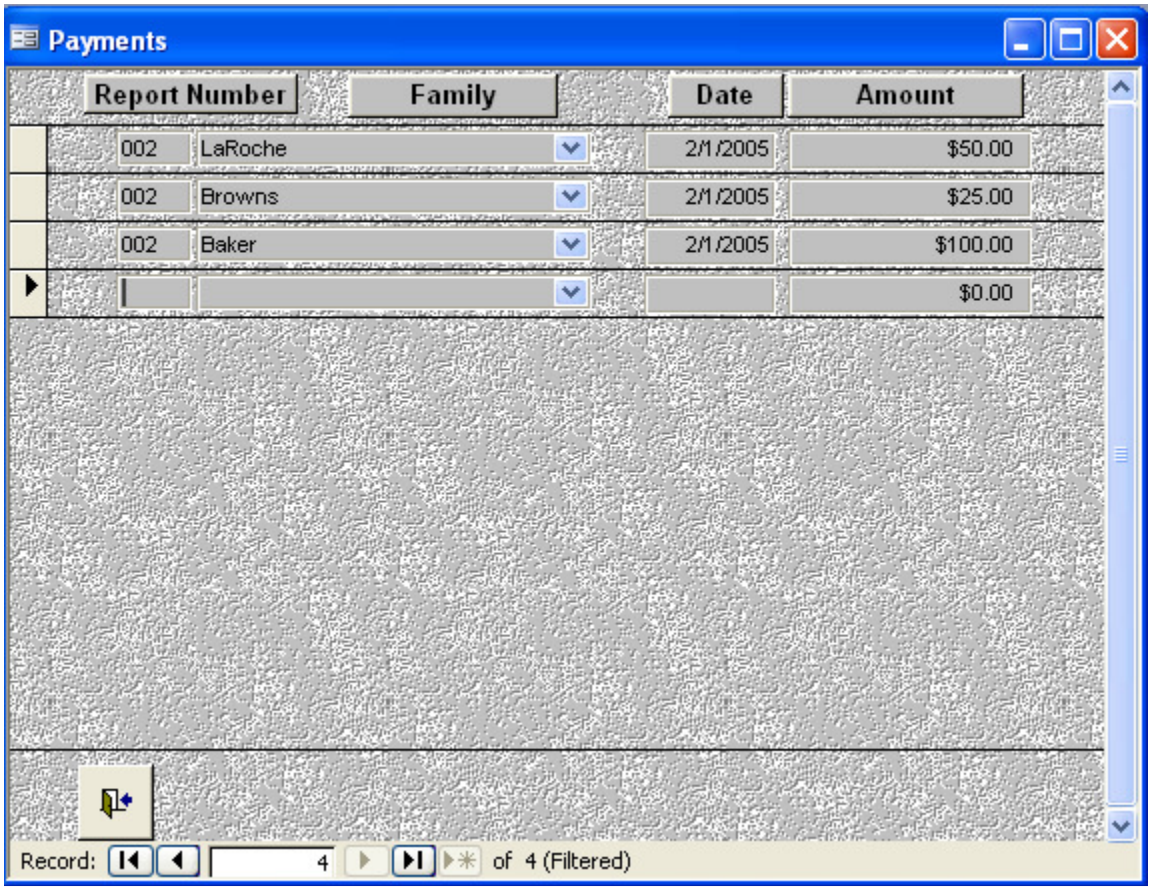
Accept Payments

Choosing this option gives you the following screen.



Enter the Report Number.
Select the Family Name from the drop-down list.
Enter the date of entry.
Enter the amount of payment received.
Each time you add a payment a new blank line will appear at the bottom to enter another one.

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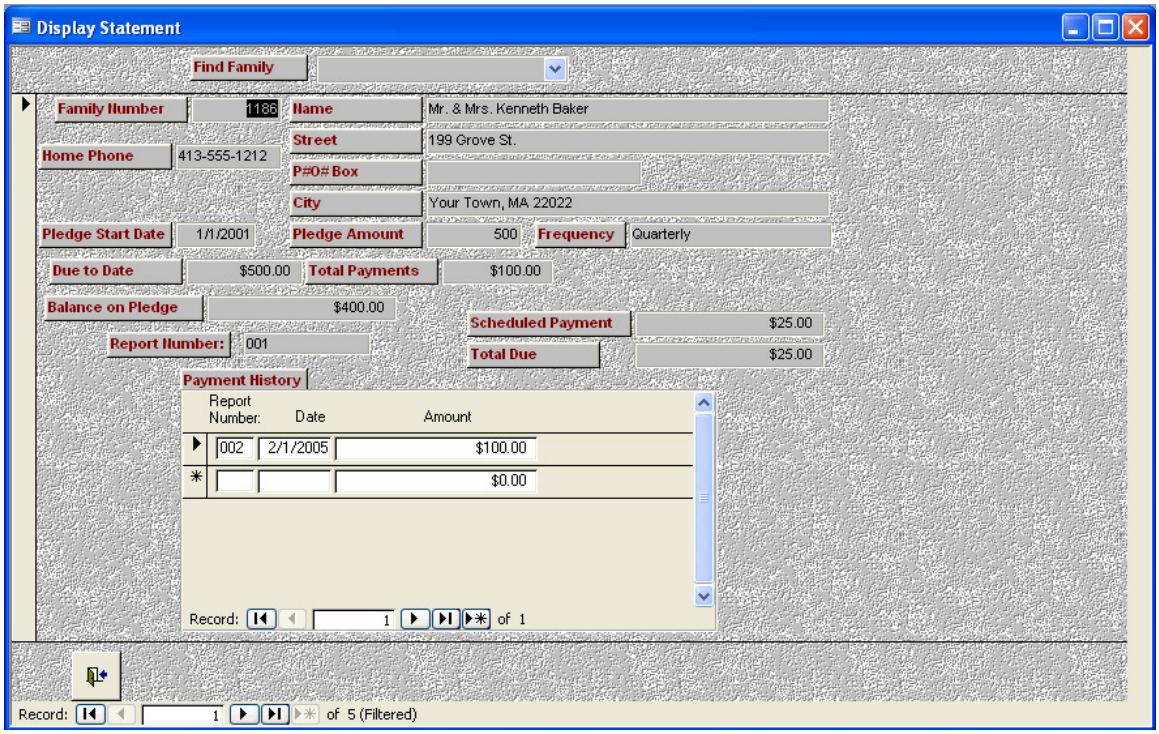
Display

Choosing this option gives you the following screen.



Displaying the Status of a Pledge

This will bring up all pledges that have been made for this drive. To move between families use the Find Family drop down box. The screen will recap the pledge and show all payments made.

Payments may also be recorded on this screen.

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Explanation of Calculations

The calculations used for both the Status and Statement are as follows:

Pledge Start date: This is the date from the drive screen

Pledge Amount: This is the amount entered for this family on the pledge screen

Frequency: This is entered for this family on the pledge screen. (1 – monthly, 3 – quarterly, 6 semi-annual, 12 – annual)

Due to date: (Number of months since the start of drive –1) divided by the frequency times (pledge amount divided by the duration of the drive in months)

Total Payments: Total of payments made to date

Amount in Arrears: [Due to Date]-[Total Payments]

Balance on Pledge: Pledge amount – Total payments

Scheduled Payment: Pledge amount/ (Pledge Duration/frequency)

Total Due: Amount in Arrears + Scheduled payment

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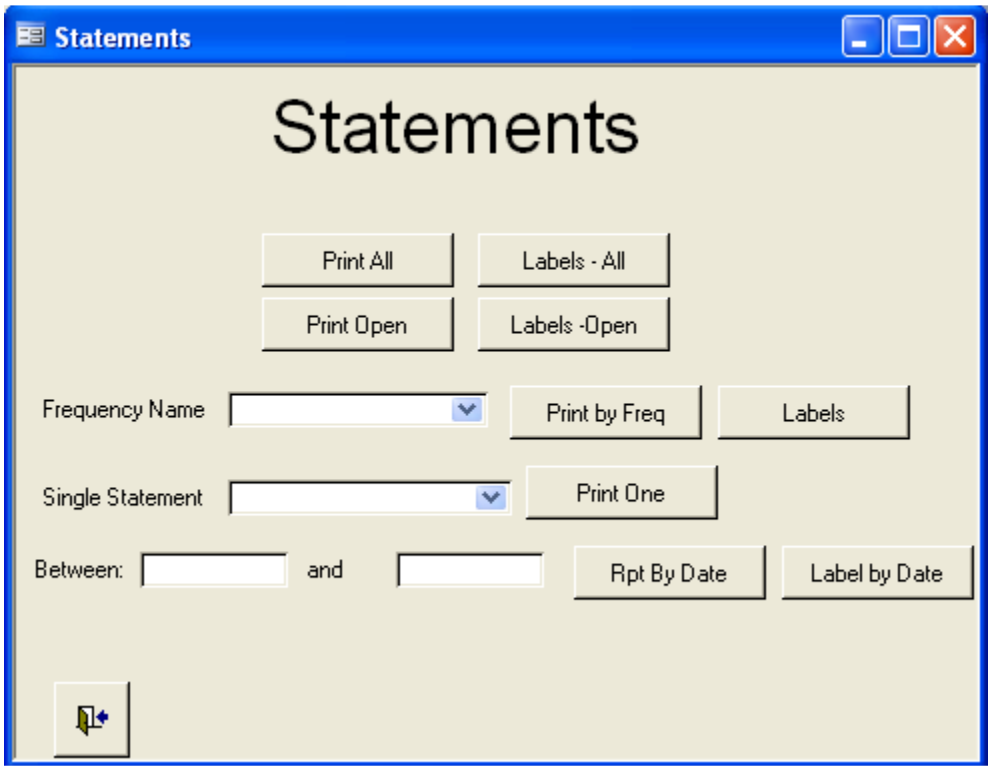
Statements

The statement is the printed version of the display screen. It will show the payment history as well as the current amount due and total due on the pledge.



From the Statement screen you have the following options:

Print All

Prints statements for all contributors of the selected drive even if their pledge is complete. (shown)

Labels – All

Prints the labels for all contributors of the selected drive even if their pledge is complete.

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St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Total Pledges

Family Name	Amount Pledged	Total Payments	Pledge Balance	Frequency	Report Numbers
Kenneth Baker 199 Grove St. Your Town, MA 22022	$500.00	$100.00	$400.00	Quarterly	001,002
Terrence Browns 38 Second St. MyTown, MA 11025	$1,000.00	$25.00	$975.00	Monthly	001,002
Joan Jackson 138 Laser Lane MyTown, MA 11025	$750.00	$0.00	$750.00	Semi Annual	001
Denis LaRoche 28 Bunny Dr. MyTown, MA 11025	$100.00	$50.00	$50.00	One time	001,002
Kevin Shawmut 17 Sweeter St. Leeville, MA 03313	$500.00	$0.00	$500.00	Monthly	001
Totals	$2,850.00	$175.00	$2,675.00		

Print Open

Prints statements for all open (unfinished) pledges only.

Labels – Open

Prints the labels for all contributors with open (unfinished) pledges of the selected drive.

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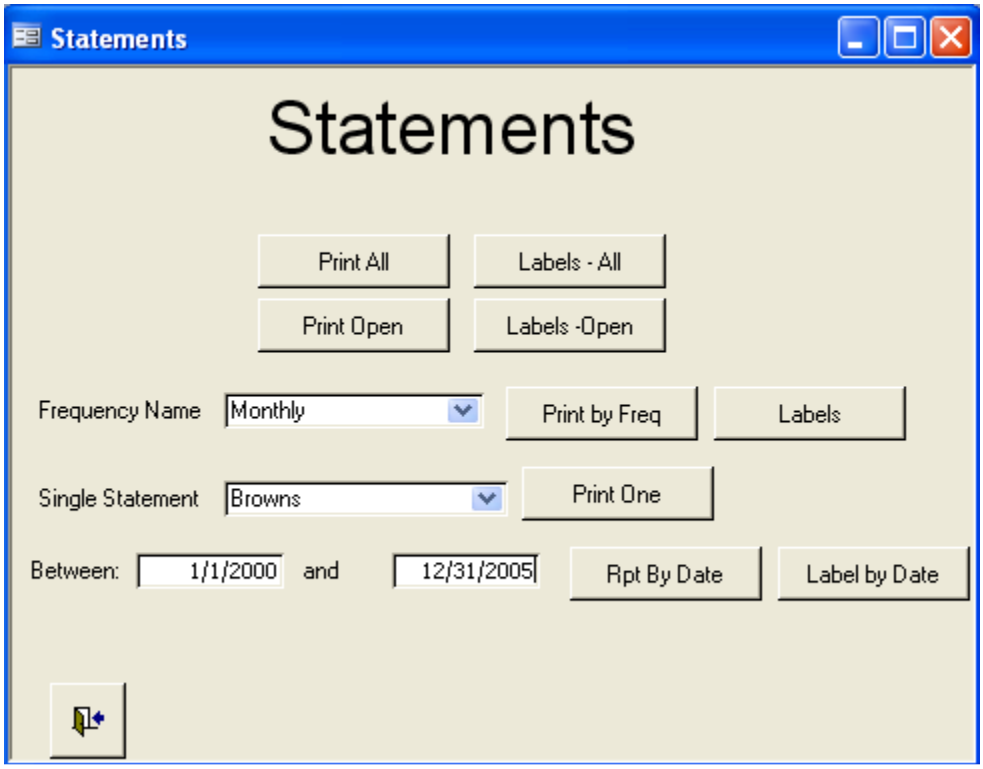
Frequency Name (Select)



Select one of 5 payment frequencies, then select

Print by Freq, or
Labels

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St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Statement

Drive : Roof replacement

5027

Mr & Mrs Terrence Browns
38 Second St.
MyTown, MA 11025

Payment Frequency	Monthly
Pledge Amount:	$1,000.00
Total Payments to date:	$25.00
Balance on Pledge:	$975.00

Date	*Payment Amount*
2/1/2005	$25.00

Total Due to Date:	$1,033.90
Total Payments to date:	$25.00
Scheduled Payment:	$16.95
Total Due:	$16.95

This will print the appropriate statements, and labels to accompany them.

Mr. & Mrs. Kenneth Baker
199 Grove St.
Your Town, MA 22022

Mr & Mrs Terrence Browns
38 Second St.
MyTown, MA 11025

Mrs. Joan Jackson
138 Laser Lane
MyTown, MA 11025

Mr & Mrs Denis LaRoche Sr.
28 Bunny Dr.
MyTown, MA 11025

Mr. & Mrs. Kevin Shawmut
17 Sweeter St.
Leeville, MA 03313

Single statement

Select the family name from the drop-down list.
Click on Print One to print the family's statement.

Date Range

Set range by entering dates Between (start date) and (end date).
Select Rpt by Date for the statements, and
Label by Date for the labels to accompany the statements.

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Support

A yearly support contract may be purchased, you will be notified of the cost each December. The contract allows for:

- Updates – requests for changes may be submitted at any time, changes will be incorporated into a future release if appropriate for the system.
- Free phone support (Customer pays toll charges)
- Free e-mail Support
- Discounted rate for custom changes
- Discounted on-site training (Springfield area only)

We also have a free knowledge base in the church section of www.RaicheConsultants.com.

Telephone support hours are between 9 AM and 5 PM Monday through Friday (free for maintenance contract holders – Toll charges apply)

e-mail Support Dave@RaicheConsultants.com is also free for support contract holders.

On site support: Available in the Greater Springfield MA. area at the current hourly rate plus travel time

This service and support are only for systems written by Raiche Consultants Inc. Support for other products is indicated with each product.

Support hours and cost are subject to change without notice.

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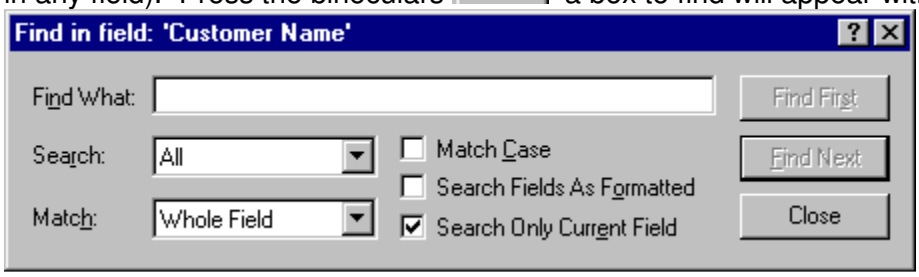
Appendix A - Access Shortcut Keys

Key Combination	Function
CTRL ;	Insert Current Date
CTRL +	Add New Record
CTRL -	Delete Record
ESC	Undo Changes to current field
CTRL X	Cut
CTRL C	Copy
CTRL V	Paste
CTRL F4	Close current Window
ALT F4	Close Access
F7	Find Box
SHIFT F4	Find Next

To move between records use the VCR buttons at the bottom:

The Single arrows move one record forward or back. The arrow with a line goes to first record and last record. The arrow with a star goes to a new record. You can also type a record number in the middle. The last number in gray show how many records on file.

To Find a record go to the field you want to search on (such as name, but can be done in any field). Press the binoculars a box to find will appear with some options:



Fill in the name, or any part of the name, and choose Whole field or any part of field and press Find First. If that is not the customer you wanted press Find Next until you find them.

To add a new record, you can use the VCR Buttons or the plus sign A blank record will appear.

To **exit,** press the close door button.