

WE ARE
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LIVING THE GOSPEL MESSAGE

PSA 2019 Batch Entry Training

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Agenda

- ▶ Introductions
- ▶ Raisers Edge Basics - In the Cloud
- ▶ Your PC and the Raisers Edge (The Citrix Download)
- ▶ Parish PSA Dashboards and Reports
- ▶ Parish PSA Batch Entry
- ▶ Mailing Validation Report & Pledges
- ▶ Acknowledgement Letters (optional)
- ▶ Q & A



Introductions



THE ORANGE
CATHOLIC
FOUNDATION

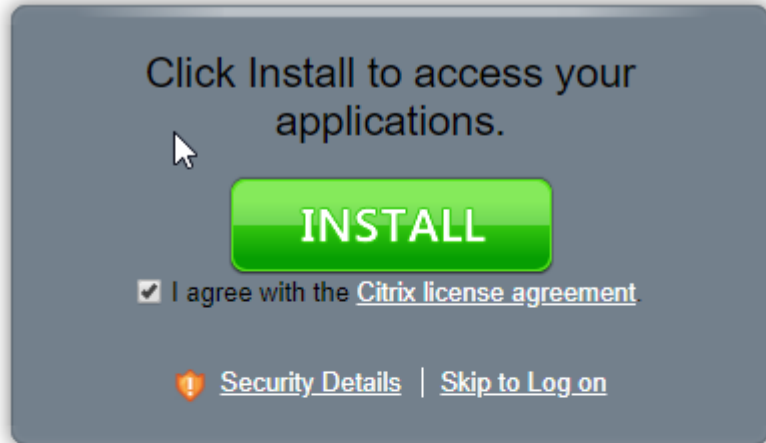
- 1) Rest Rooms
- 2) OCF Team
- 3) Share Best Practices
- 4) Have Fun

Raisers Edge Basics - In the Cloud

- ❖ Blackbaud's Raisers Edge and NXT(OCF Website)
- ❖ Hosted at the Boston Data Center
 - ❑ Internet connection speed most important
 - ❑ Your browser attaches to a PC in the data center
 - ❑ Severe weather may impact speed
- ❖ Secure, Backed Up, Monitored 24x7, Support 24x7
- ❖ Security by Constituency and Fund Code
 - ❑ Constituency is your specific Parish database (Duplicates ?)
 - ❑ Parish's only have access to gifts with PSA funds

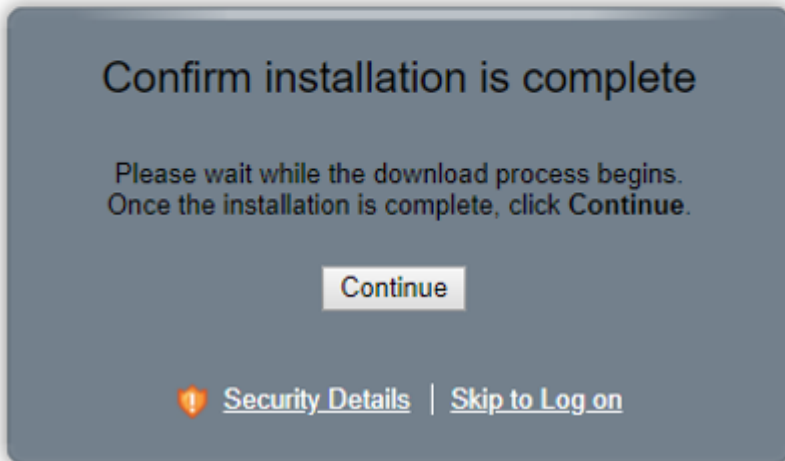
Your PC and the Raisers Edge

(The Citrix Download)



From any Browser
(Explorer, Chrome, Firefox,)

<https://login2.blackbaudhosting.com>



Bookmark or save as Favorite

Notes:

Make sure the printer you want to print to is the default before signing in

Parish PSA Dashboards and Reports

The screenshot shows the 'The Raiser's Edge' software interface. The main window displays a dashboard for 'ZZZ Train 1' with the following components:

- Navigation Menu (Left):** Home, Records, Query, Export, Reports, Batch, Dashbo..., Web Services, Plug-Ins, Help.
- Header:** Welcome ZZZ Train 1, Resource Center, (Build 5782) Diocese of Orange, Refresh, Cancel.
- Favorites:** # Latest News and Campaign Updates #, Latest PSA News and Information, Open Individual Parishioner Records, Open Individual Parishioner Record, Batch Entry Screen, PSA Batch Processing.
- PSA Parish Reports:** Pledge Status Report, ZZZ Train YTD Donor Report, ZZZ Train YTD LYBUNT Report, ZZZ Train YTD Trend Report.
- Parish Goal 2011:** As of 1/12/2011 3:41:17 PM. A bar chart showing 'Total Given' (blue bar) and 'Goal' (purple bar) for 'ZZZ Train Fund 2011'. The Y-axis ranges from \$0 to \$6,000.
- Parish Summary:** As of 1/12/2011 3:41:19 PM. A table with columns: Row, Fund ID, Fund Overall Goal, Total Given - Payments, Total Pledged, Number of Donors, Average Pledge Amount, Average Payment, Largest Pledge, Largest Payment.

Row	Fund ID	Fund Overall Goal	Total Given - Payments	Total Pledged	Number of Donors	Average Pledge Amount	Average Payment	Largest Pledge	Largest Payment
1	ZZZ Train 2011	\$5,555.00	\$140.00	\$6,120.00	5	\$1,020.00	\$35.00	\$5,000.00	\$100.00
2	ZZZ Train 2010	\$4,444.00	\$25.00	\$275.00	2	\$137.50	\$25.00	\$250.00	\$25.00
- OCF Processed Gifts:** As of 1/12/2011 3:41:20 PM. A table with columns: Row, Constituent ID, Name, Date Committed, Gift Type, Gift Amount, Gift Pledge Balance, Gift Payment Type, Gift Batch Number, WEB Gift, Gift Is Anonymous, Gift Installment Frequency, Reference/Notes.

- ▶ Home Screen
- ▶ Favorites
- ▶ Batch Processing
- ▶ PSA Reports
 - ▶ Donor
 - ▶ LYBUNT
 - ▶ Trend
- ▶ Dashboards
 - ▶ Funds
 - ▶ OCF Gifts
 - ▶ Gift Details

Parish PSA Batch Entry

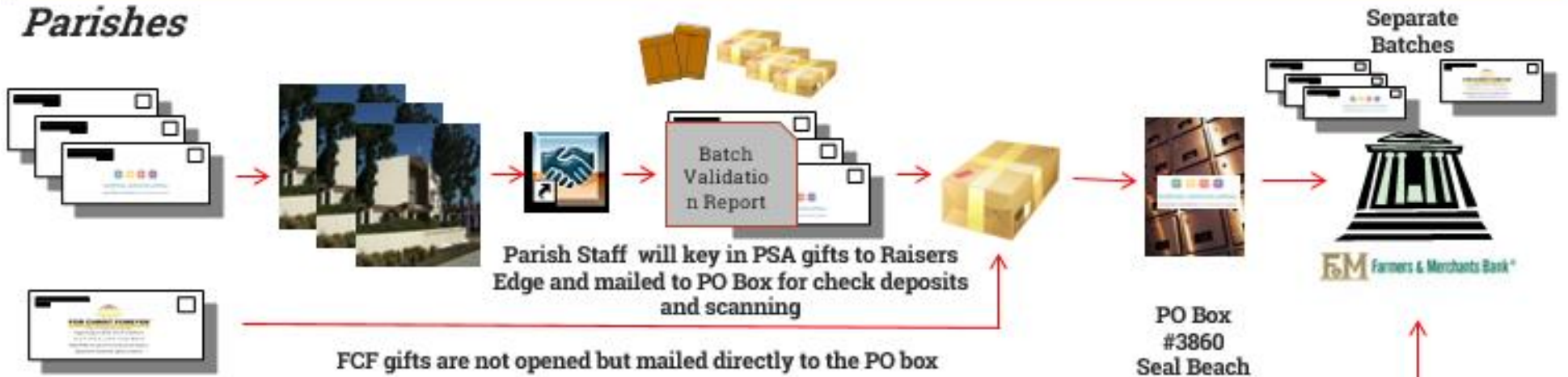
The screenshot shows the 'Batch' entry screen in 'The Raiser's Edge' software. The interface includes a navigation menu on the left with options like Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, Dashbo..., Data Health Center, Online Express, Web Services, Plug-Ins, and Help. The main content area displays a tree view of categories, with 'PSA 2019' selected. Below the tree view is a table with columns: Batch number, Description, Created By, Created On, Batch Type, and Times Committed. The table is currently empty. At the bottom, there are checkboxes for 'Only show my batches' and 'Only show batches not committed', a 'Recently Accessed Batches' section listing 'Batch CP320190201-ODM', 'Batch CP320190201-CCM', and 'Batch CAP20190201-ODM', and a 'Quick Find' search bar containing 'OLLV20190201-CCD'.

- ▶ PSA 2019 Category
- ✓ My Batches Only
- ▶ Name Your Batches
 - ▶ Parish #
 - ▶ Sequence
 - ▶ “Bills”
- ▶ Tracking
- ▶ New Entries:
 - ▶ Credit Card #s
 - ▶ Direct Debits
- ▶ Validation Report
- ▶ Mail to Lock Box - Seal Beach

Mailing Validation Report & Pledges

Supplies from OCF

Parishes



Donors



Pledges
or
Payments

PO Box
#3860
Seal Beach

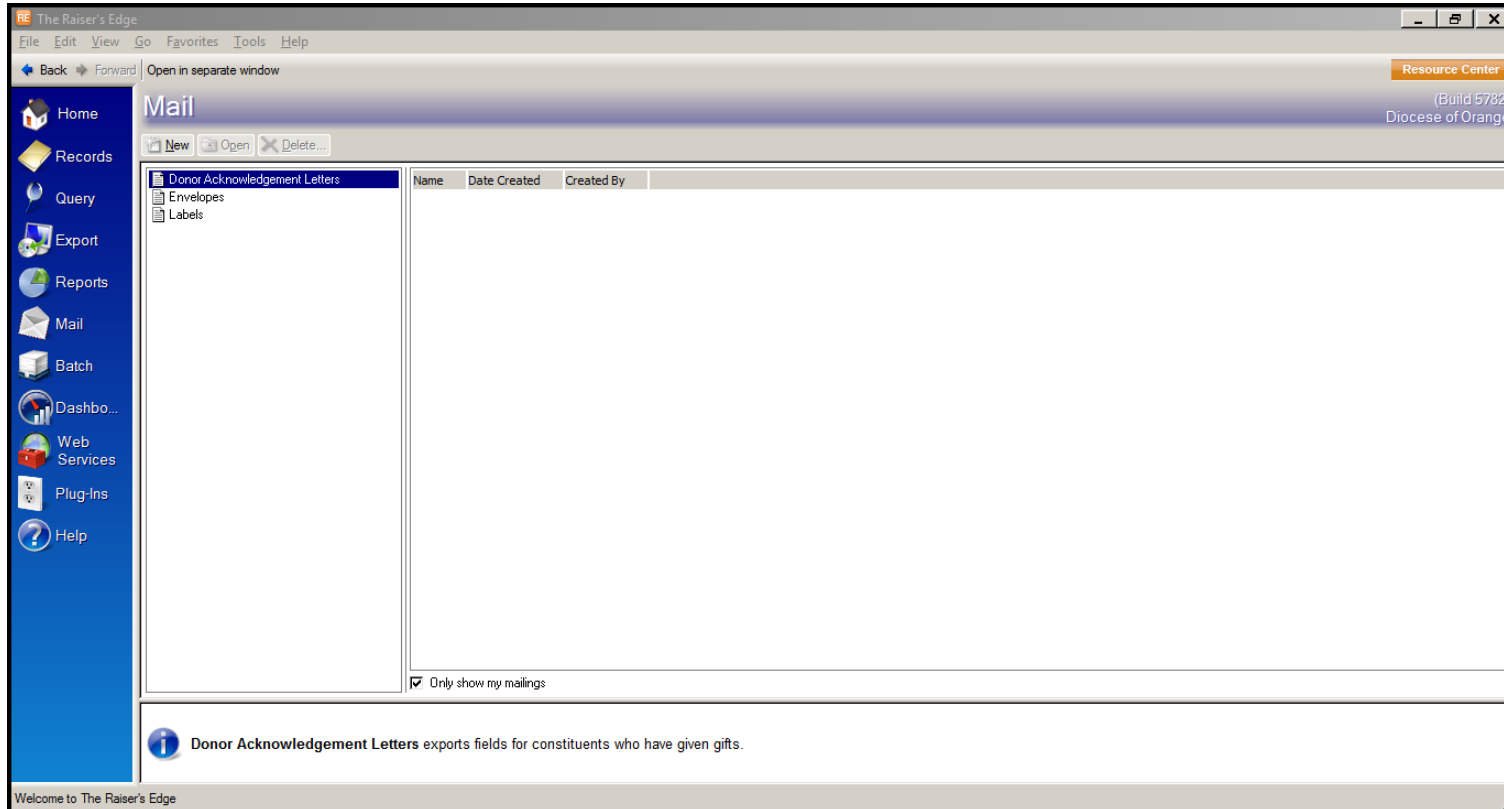
PO Box
#4903
Garden
Grove



To F&M Lock
Box for
Deposits and
Scanning



Acknowledgement Letters (optional)



▶ Optional

- ▶ Need Your Parish Letter
- ▶ OCF to Configure for each Parish
- ▶ Identifies Acknowledged
- ▶ Set your Printer before running
- ▶ Envelopes and Labels

Q & A

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