

Recorder Level

Complete Planned Giving Online Recording System Manual

Version 2.1



generous
living

Australia Southern Territory
Mission Resources Department

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FORENOTE

The Planned Giving Online Recording System has been created by The Salvation Army Australia Southern Territory, for use by Corps, Division and Territories to record weekly giving and report on personal and corporate Giving to God.

The Recording System is a simple web browser that can be used by anyone with access to the world-wide-web and an allocated User ID. Users with basic computer skills will find the program easy to use.

We believe the outcome of using this product will be:

- Accountable, confidential and secure management
- Confident corps recorders
- Informed Corps Officers
- Encouraged personal givers

This Recording System will assist your Corps in the management of congregational giving. This system will be used in conjunction with the processes and policies for managing Corps Finances, as stated in the ***Orders and Regulations for Corps Secretaries and Treasurers***, which includes the requirement that at least two unrelated signatures are included on record sheets, records are kept on The Salvation Army premises and stored for 7 years.

Territorial Planned Giving Team

Australia Southern Territory

April 2014

CONTROL FEATURES OF THE ONLINE RECORDING SYSTEM USER INTERFACE

The Online Recording System, although it has the look and feel of many Web page Applications, has some icons and User interface facilities that may require explanation.

CHANGE DETAILS ICON



The general use of this icon throughout the Online Recording System, is to take you to the Change Details screen of whatever item you are looking at.

In a Family Unit Management screen, this means editing the name and address details of the Family Unit.

In a Weekly Giving screen, it means editing the Giving for the Corps for that week (*this is helpful for EFT/Direct Debit givers when the data comes in later due to waiting for bank statements*).

INACTIVATE/REMOVE ICON



This icon is used to make the item that you are viewing on the screen, that it is associated with, inactive. In some instances it will actually remove the item (*delete it*).

REACTIVATE ICON



This icon is used to make the item that you are viewing on the screen, which it is associated with, reactivate. This icon will only be visible for something that is inactive.

SHOW PARTICIPATION ICON



This icon only appears on the Family Unit Management Screen and it is used to view the Family Units participation details. This is a sub menu that behaves in the same way as the other menus in the Online Recording System.

SHOW REDUCTION ICON



Identical to the Show Participation Icon, except that it takes you into the reduction details screen for the Family Unit. This icon only becomes active for a Family Unit that has participation.

DELETE ICON



Be careful with this icon! It appears on the User menu and it allows you to delete the User from the Online Recording System (*there is no "Are you sure you want to delete" prompt – once clicked, they are gone!*) It also appears on the Program menu so that a completely empty program can be removed.

BLUE TEXT

Whenever blue text appears in the Online Recording System (*for example, "Add Family Unit"*) clicking on the text will do what it says. When your mouse cursor is over this, it will change to indicate that the text is active like any hyperlink in normal Web browsing.

BOLD & UNDERLINED NUMBERS IN THE DARK BLUE BOTTOM RIBBON

When there are more items than can be displayed on the screen, bold (*white*) numbers will appear in the bottom (*dark blue*) ribbon. The underlined number indicates the number of the current screen you are on and any others are active "clickable" links to take you to the next screen as numbered. The text behaves as described above for "Blue Text" of the indicated numbers. Because the underlined one is the current screen number that you are looking at, this text is not active and does not do anything. As below...

126, 300 Elgar Road	Box Hill South - Victoria			
Victoria Street	Box Hill - Victoria			
Estella Street	Glen Iris - Victoria			
<u>1</u> 2 3 4 5 6 7 8 9 10 ...				

USING THE ONLINE RECORDING SYSTEM

ALL ACCESS LEVELS

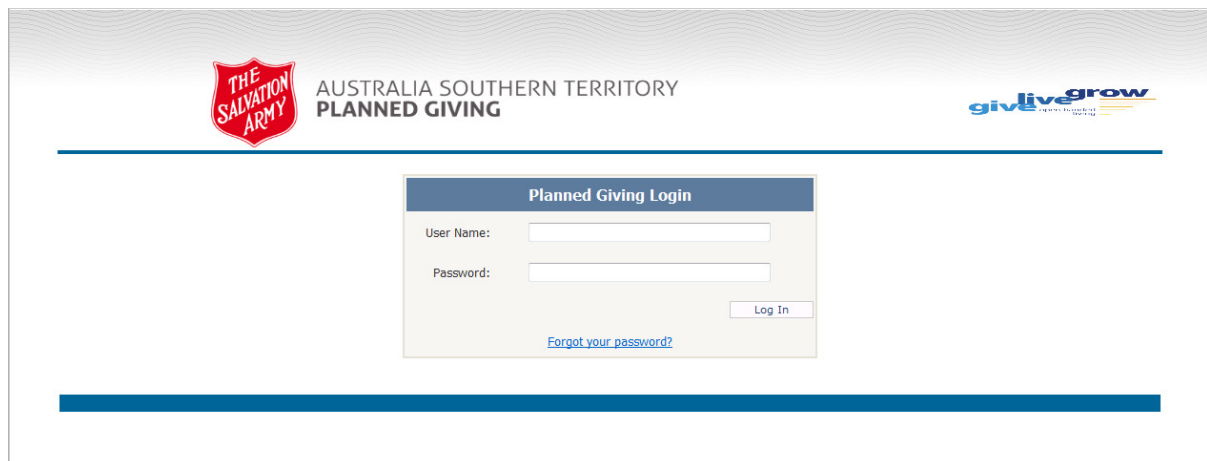
LOGGING IN

To log into the Online Recording System you will need to have a User Name allocated to you. A form will need to be submitted through your Territorial Administrator (*of the Online Recording System*). This form contains personal details and relevant details to ensure that the Recording System is synched to you as the User and at the right level as a User.

Once this has been processed, you will be sent an automatic email confirming this. The email will include the URL to get to the login page, your Username and your Password. Also included in the email will be your unique Security Question and matching Answer, which you will need to provide, should you forget your Password and need to reset your User Account. When your User Account is reset again, an email will be sent to you with your existing Username and New Password. For this reason, it is important to keep your email address up to date with the THQ Online Recording System Administrator, should you change your email address. (*Remember some Online Recording System Users do not use Lotus Notes, but things like hotmail, gmail etc.*)

Using the URL that is included in the email, go to it through an internet browser.

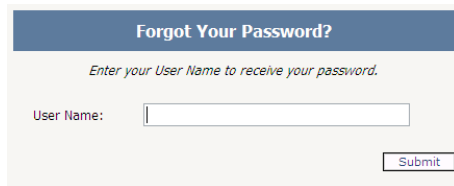
The following screen will display, where you can enter your Username and Password:



The screenshot shows a web page for 'Planned Giving Login'. At the top left is the Salvation Army logo. To its right, the text reads 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING'. On the top right is the 'give live grow' logo. The main content area is a light-colored box with a dark blue header that says 'Planned Giving Login'. Inside this box, there are two input fields: 'User Name:' and 'Password:'. To the right of the 'Password:' field is a 'Log In' button. Below the input fields is a blue link that says 'Forgot your password?'. The page is framed by a blue border at the top and bottom.

FORGOTTEN PASSWORD

If you forget your Password then at the login screen click on the “Forgot your Password?” link, which will display the following window:

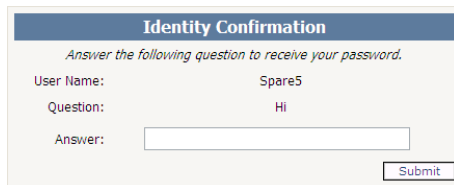


Forgot Your Password?

Enter your User Name to receive your password.

User Name:

When you enter your User Name, the next window will display, prompting you to correctly enter the answer to your Security Question:



Identity Confirmation

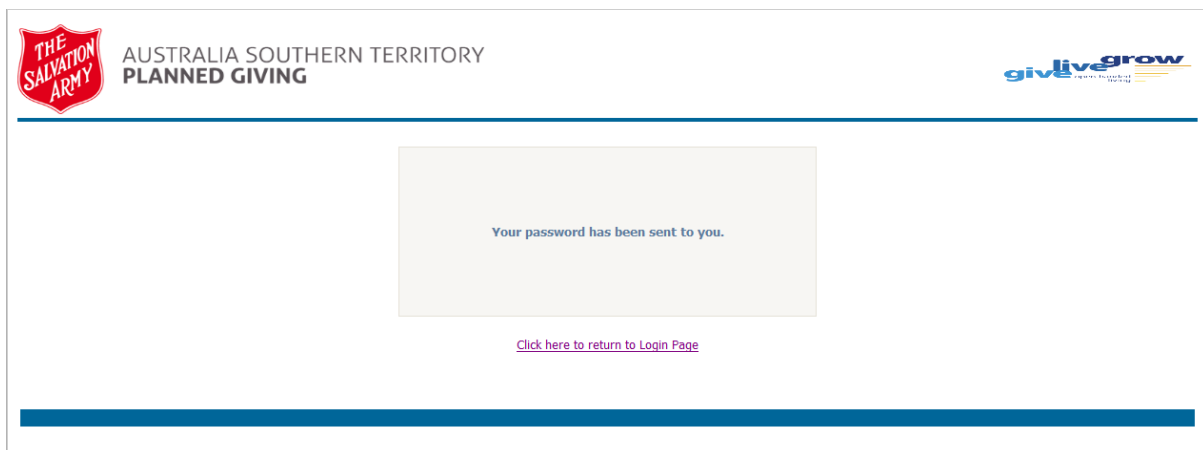
Answer the following question to receive your password.

User Name: Spare5

Question: Hi

Answer:

If you are able to correctly answer the question, the following message will display, to confirm that the login account has been reset and that you will receive via email your New Password:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY
PLANNED GIVING

give live grow

Your password has been sent to you.

[Click here to return to Login Page](#)

If you are not able to correctly answer your security question, or your email address details have changed and so you are not able to receive the email, then you will need to contact the Online Recording System Administrator, to have your account corrected at an administrative level.

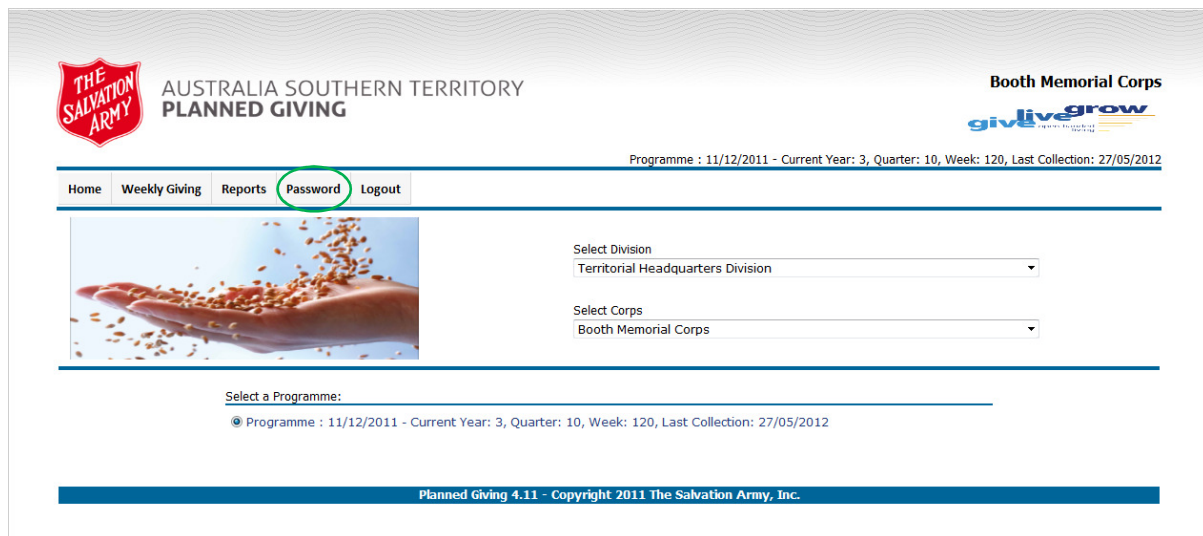
CHANGING YOUR PASSWORD

It is strongly recommended that after a Password has been assigned to a new User Account, or it has been reset, then it is changed to something that is easy for you to remember. The Password must comply with the following rules:

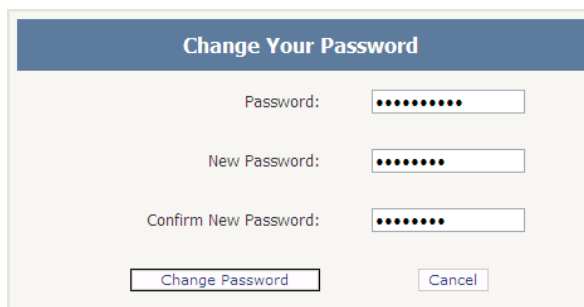
- Minimum length 7 characters;
- 1 Character, at least, must be a non-alphanumeric (eg. !, @, #, \$, %, ?).

It is also recommended, for the purpose of maintaining a secure system, that Passwords are not something that can be guessed by people who know you. Also, do not allow Internet Explorer to remember the Password for you, since that will mean that any person who has access to your computer, will also have access to your Online Recording System User Account.

To change your Password, click on the Password menu:

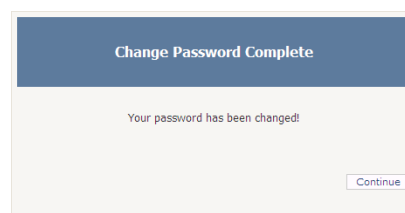


The following window will appear, where you will be required to enter your current Password and your New Password twice. Then click Change Password:



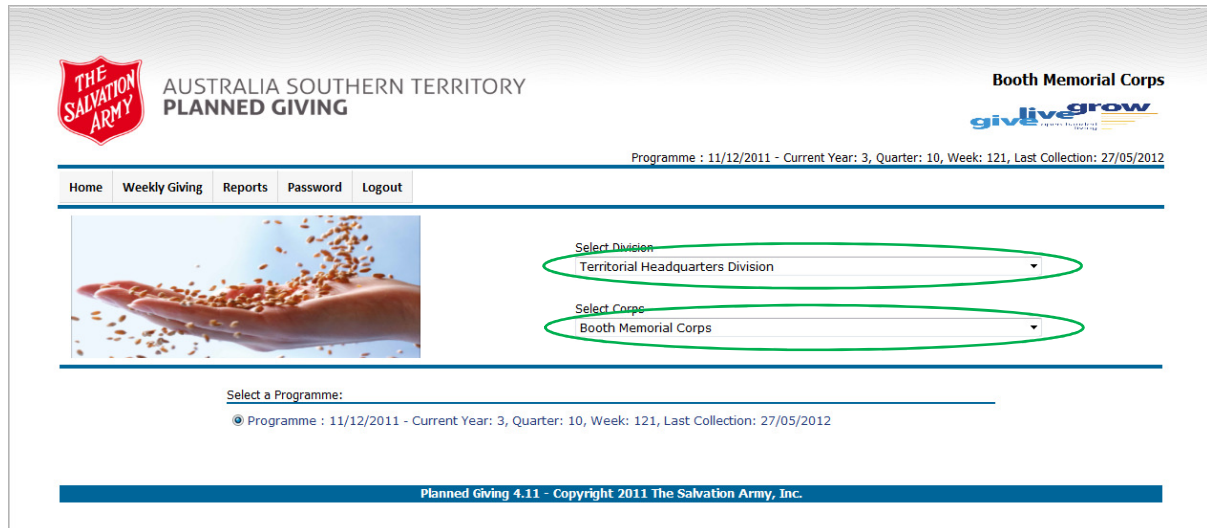
Provided your Password complies with the rules, the following window will appear to confirm your Password has been changed:

Click Continue to return to the home screen.



HOME

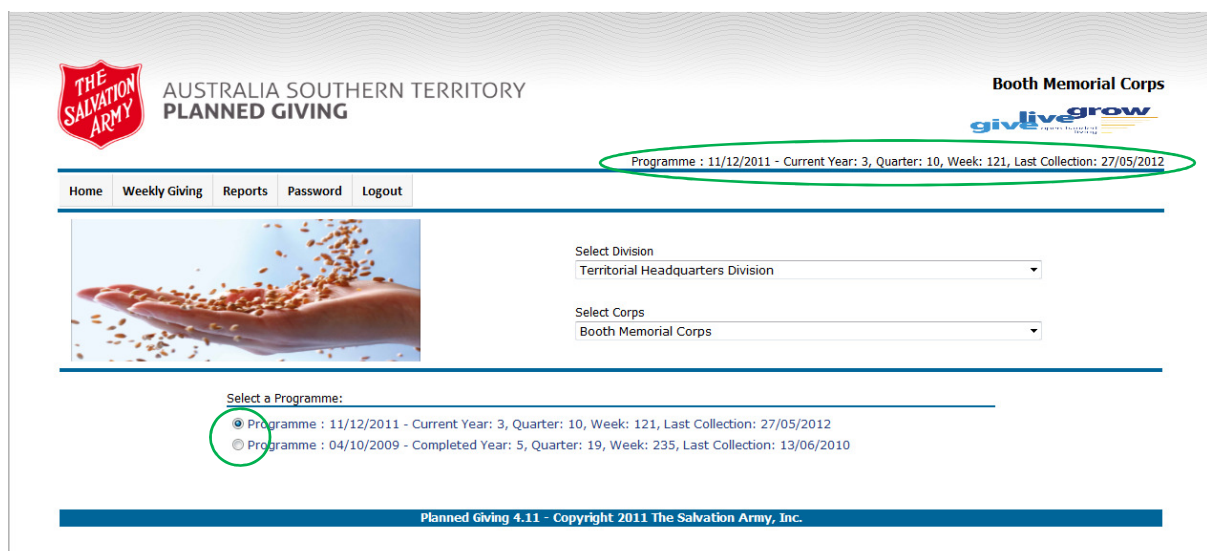
When you log in, the screen that you see displayed is the “Home” screen. Clicking on the [Home](#) menu, returns you to this screen. For Users that are allocated to more than one Corps, this screen enables you to select the different Corps (*and Divisions*) that you may have access to:



The screenshot shows the 'Home' screen for the Australia Southern Territory Planned Giving system. The page header includes the Salvation Army logo, 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING', and 'Booth Memorial Corps'. A navigation menu contains 'Home', 'Weekly Giving', 'Reports', 'Password', and 'Logout'. The main content area features a large image of a hand holding coins, a 'Select a Programme:' section with a radio button selected for 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012', and two dropdown menus: 'Select Division' (Territorial Headquarters Division) and 'Select Corps' (Booth Memorial Corps), both highlighted with green ovals. The footer reads 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

Prior to the commencement of a New Program, a Pending Program will appear as a separate selection option on the [Home](#) screen under the title “Select a Programme:” Once a Program begins, the Pending Program status will be set to “Current”, so there will be two Current Programs. Care must be taken to differentiate between the two and ensure that the correct data is placed with the correct Program. *(You can have two “Current” Programs for a 13 week period, while one Program is completing and one is beginning. This allows for any “late” giving to one Program, and might happen where Direct Debit needs to be added from the corps bank statement, or where a Monthly or Yearly gift is made and it falls into the ‘Old’ Current Program. It allows for a period of grace).*

The [Home](#) screen allows you to see which Program is currently selected, displays data about the selected Program and enables you to choose between which Program you are actively working on:

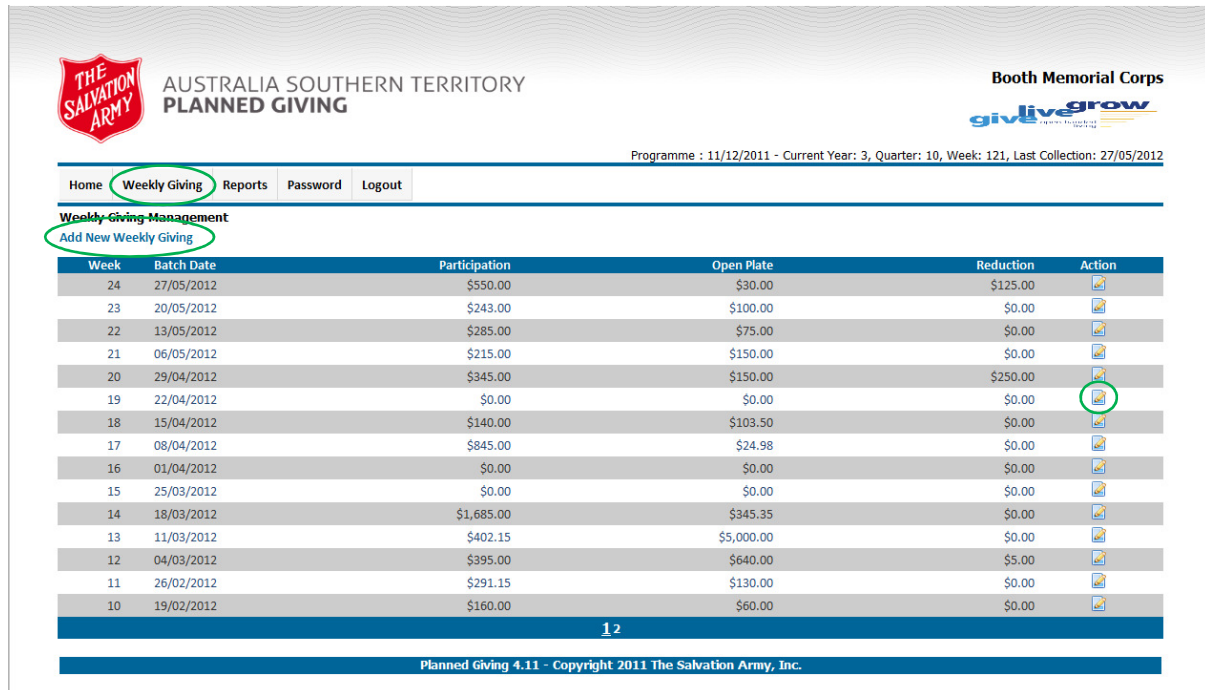


This screenshot is similar to the previous one but highlights the 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012' text in the 'Select a Programme:' section with a green oval. Below it, a second option is visible: 'Programme : 04/10/2009 - Completed Year: 5, Quarter: 19, Week: 235, Last Collection: 13/06/2010'. The footer remains 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

At 13 weeks into a New Program, the previous ‘Old’ Program will be marked as completed and hidden away from the Home screen, so that it can no longer be selected (*or changed*).

WEEKLY GIVING

To enter the Weekly Giving, click on the Weekly Giving menu (*the most common action*).



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY **PLANNED GIVING** **Booth Memorial Corps**
 givivegrow
 Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home **Weekly Giving** Reports Password Logout

Weekly Giving Management
 Add New Weekly Giving

Week	Batch Date	Participation	Open Plate	Reduction	Action
24	27/05/2012	\$550.00	\$30.00	\$125.00	
23	20/05/2012	\$243.00	\$100.00	\$0.00	
22	13/05/2012	\$285.00	\$75.00	\$0.00	
21	06/05/2012	\$215.00	\$150.00	\$0.00	
20	29/04/2012	\$345.00	\$150.00	\$250.00	
19	22/04/2012	\$0.00	\$0.00	\$0.00	
18	15/04/2012	\$140.00	\$103.50	\$0.00	
17	08/04/2012	\$845.00	\$24.98	\$0.00	
16	01/04/2012	\$0.00	\$0.00	\$0.00	
15	25/03/2012	\$0.00	\$0.00	\$0.00	
14	18/03/2012	\$1,685.00	\$345.35	\$0.00	
13	11/03/2012	\$402.15	\$5,000.00	\$0.00	
12	04/03/2012	\$395.00	\$640.00	\$5.00	
11	26/02/2012	\$291.15	\$130.00	\$0.00	
10	19/02/2012	\$160.00	\$60.00	\$0.00	

1 2

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

From the commencement of a Program, the first Sunday after Pledge Sunday will be the first one to be available for Weekly Giving entry. Click the blue text, "Add New Weekly Giving", to add the next weekly Giving. The Online Recording System does not allow for weeks to be skipped, since chronologically, they always exist. When there is a week where no offering is received (*eg. Commissioning*), a week should be added and no data recorded against it. This results in a zero offering week, where the week exists but there is no Giving data recorded against it.

If a Weekly Giving entry needs to have additional Giving recorded against it (eg. EFT), or a correction needs to be made, then clicking on the "Change Weekly Giving Details" icon, in the Action column, will open the Weekly Giving entry for editing.


Weekly Giving Management
[Recalculate Totals](#)

Weekly Giving Details

Giving Week:

1 5.00	2 5.00	3 10.00	4 25.00
5 30.00	6 35.00	7	8
9	10 40.00	11 45.00	12
13 50.00	14	15	16
17 0.00	18	19	20
21	22	23	Envelope Subtotal: 245.00
25	26 0.00	27	24 0.00
29	30	31	28
33	34	35	32
37	38 0.00	39 100.00	36
			40 0.00
			Envelope Subtotal: 100.00
			Envelope Total: 345.00
			Prayer Meeting: 0.00
			Open Plate Total: 150.00
			Weekly Giving Total: 495.00

Family Worship: 150.00
other: 0.00

Prayer Meeting: 0.00

Open Plate Total: 150.00

Weekly Giving Total: 495.00

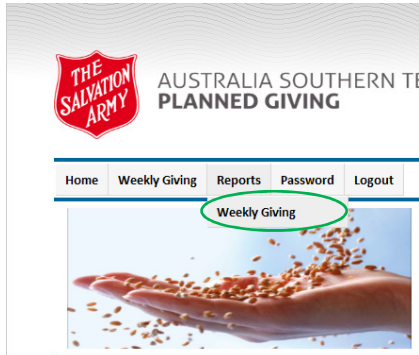
The Weekly Giving Data entry screen allows you to fill in the pledge amounts against the envelope numbers. At anytime, the "Recalculate totals" button will update the totals at the bottom of the screen – This does not save the data!

The Open Plate amounts for the designated meetings are entered at the bottom of the Giving screen. Clicking "OK" saves the Weekly Giving entry and "Cancel" returns to the Weekly Giving Management Screen without saving.

REPORTS

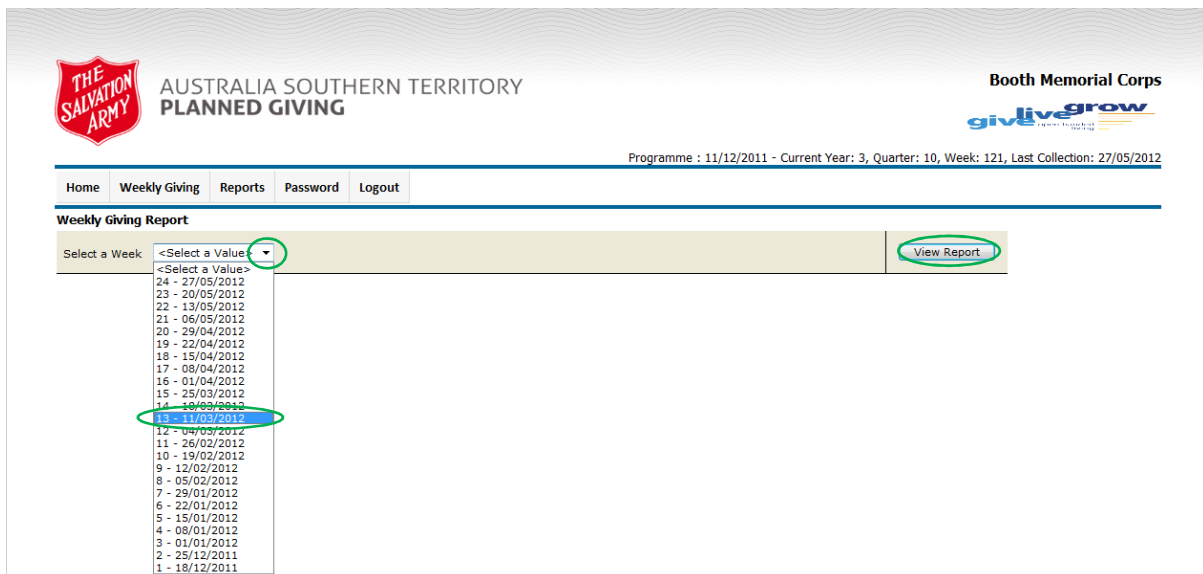
WEEKLY GIVING

For Data Entry Users, the only report that is available is the Weekly Giving Report. This report displays and provides the facility to printout any entered Weekly Giving entry.

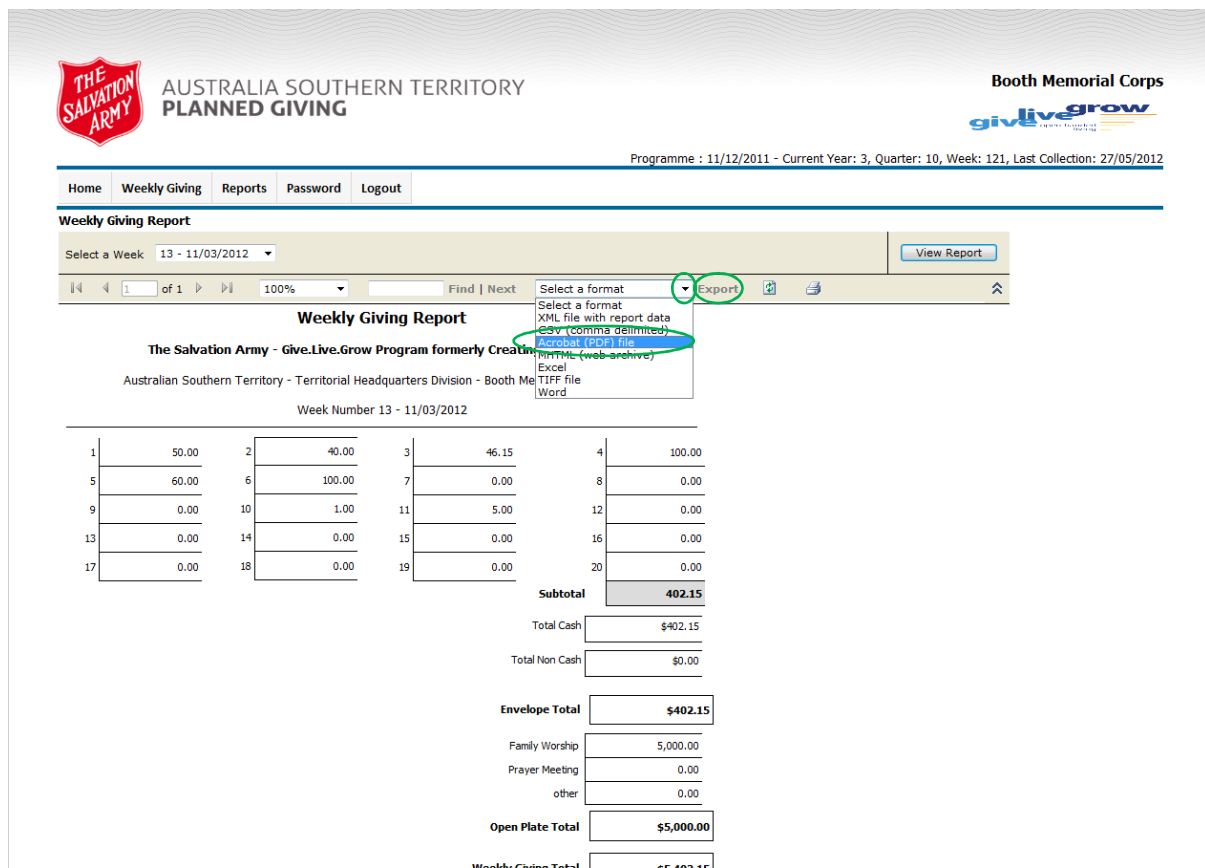


Once you have clicked the Weekly Giving menu, under the Reports menu, the following screen will display:

Select the week that you wish to display/print and then click the "View Report" button.



The report will view as shown below:



Weekly Giving Report

Select a Week: 13 - 11/03/2012 View Report

Export

- Select a format
- Select a format
- XML file with report data
- CSV (comma delimited)
- Acrobat (PDF) file**
- PrintMark (web archive)
- Excel
- TIFF file
- Word

Weekly Giving Report

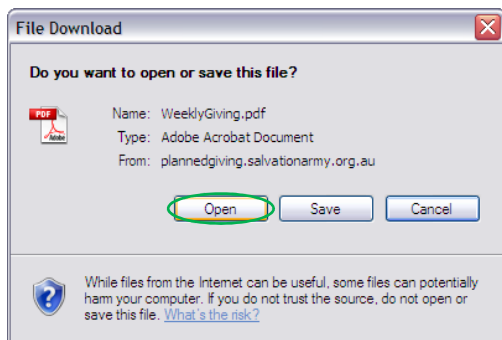
The Salvation Army - Give.Live.Grow Program formerly Creative

Australian Southern Territory - Territorial Headquarters Division - Booth Memorial Corps

Week Number 13 - 11/03/2012

1	50.00	2	40.00	3	46.15	4	100.00
5	60.00	6	100.00	7	0.00	8	0.00
9	0.00	10	1.00	11	5.00	12	0.00
13	0.00	14	0.00	15	0.00	16	0.00
17	0.00	18	0.00	19	0.00	20	0.00
Subtotal							402.15
Total Cash							\$402.15
Total Non Cash							\$0.00
Envelope Total							\$402.15
Family Worship							5,000.00
Prayer Meeting							0.00
other							0.00
Open Plate Total							\$5,000.00

To print the report, select "Acrobat (PDF) file" as the export format and click the "Export" text. You will then be asked what you want to do with the file that is being exported.



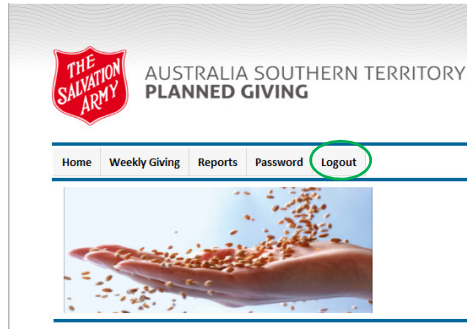
Click "Open" button, which will open the file on Acrobat Reader, where you will be able to print it from.

Acrobat (PDF) is a document type, which presents the best, as far as overall formatting is concerned and it is easier to send via email, if required.

LOGOUT

After any work is completed, the User should always logout from the Online Recording System. As a security measure, this will time out the Internet Explorer for the Online Recording System internet pages. If you wish to logback in and do further work you will need to close the Internet Explorer browser completely before being able to logback in.

Click on the logout menu to logout.



CORPS RECORDER ACCESS LEVEL

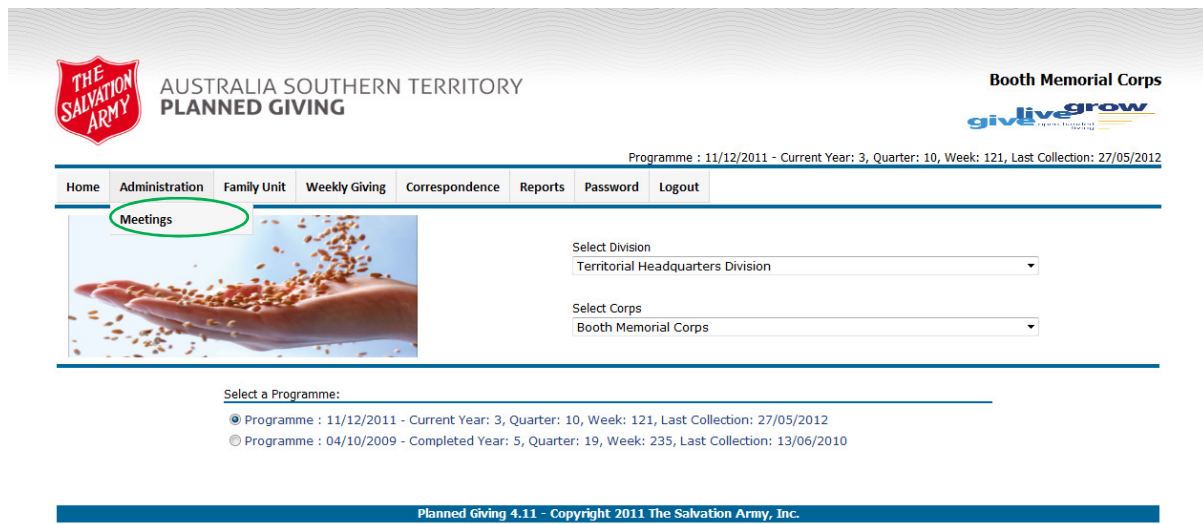
The Corps Recorder Access Level, has management access to all data at the Corps level at their Corps. For this reason, the Corps Recorder Access Level must be considered a position of trust, which requires sensitive handling of privileged information.

ADMINISTRATION

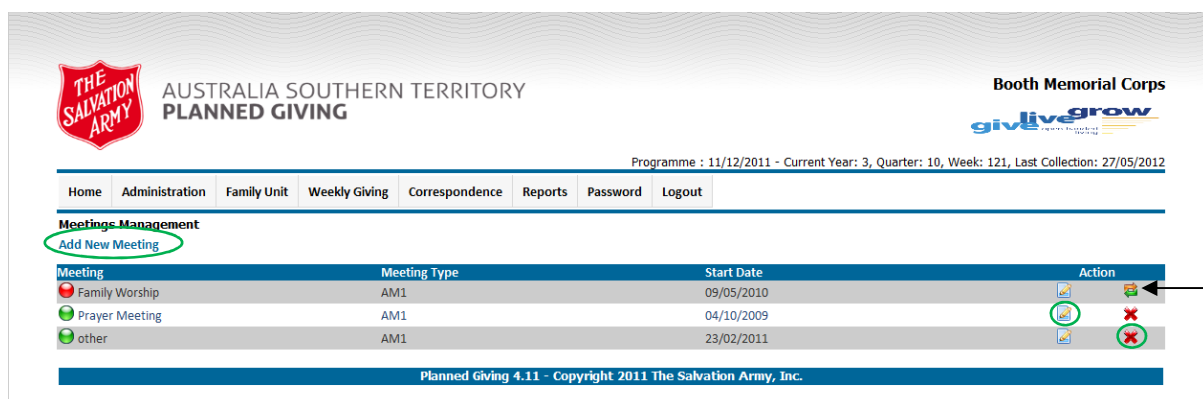
Corps Recorders are able to enter (*or alter*) the names of the meetings that have an offering where open plate Giving will be received. This name then appears on the Weekly Giving page, so that the open plate offering amount can be recorded for the specific meeting (*by name*) for that week. This assists Corps who have multiple meetings.




MEETINGS

Click on the Administration, Meetings menu to access the Meetings management screen:



From this screen, new meetings can be added, Meetings activated or deactivated:



Meeting	Meeting Type	Start Date	Action
Family Worship	AM1	09/05/2010	
Prayer Meeting	AM1	04/10/2009	
other	AM1	23/02/2011	

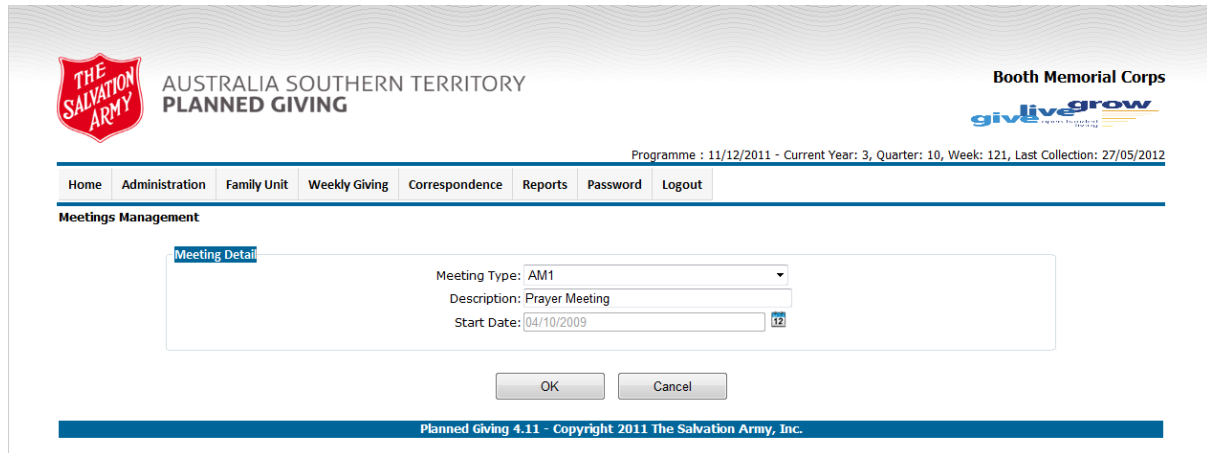
From the above screen it can be seen that there will be two Meetings active on the weekly Giving entry sheet, for recording open plate Giving. These are: Prayer Meeting and Other.

The meeting, Family Worship, has been made inactive, which means it will not appear on the weekly Giving data entry. It could, at anytime, be reactivated by clicking on the Reactivate Meeting icon.

In the same way, the active Meetings could be taken off the Weekly Giving data entry, by clicking on the Inactivate Meetings icon (the red X). If you wish to change the details of a meeting, clicking on the Change

Meetings Details icon, will provide the Meetings Detail window, that will allow you to edit the fields for that meeting.

To add a new meeting, click on the text "Add New Meeting":



The screenshot shows the 'Planned Giving 4.11' interface for the 'Booth Memorial Corps'. The top navigation bar includes 'Home', 'Administration', 'Family Unit', 'Weekly Giving', 'Correspondence', 'Reports', 'Password', and 'Logout'. The 'Meetings Management' section is active, displaying a 'Meeting Detail' window. This window contains the following fields:

- Meeting Type: AM1 (dropdown menu)
- Description: Prayer Meeting (text input)
- Start Date: 04/10/2009 (text input with a calendar icon)

At the bottom of the window are 'OK' and 'Cancel' buttons. The footer of the interface reads 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

The Meetings type can be set to the following values:

- AM1;
- AM2;
- PM1;
- PM2;
- OTHER.

The description can be whatever the name of the Meeting is (*this is what will appear on the Weekly Giving data entry*).

The Start Date can be set by clicking on the calendar icon and choosing the date you require. This does not effect when the date appears on the Weekly Giving data entry.

Click "OK" button to save the new meeting, or "Cancel" to return to the Meetings Management screen without saving.

FAMILY UNIT

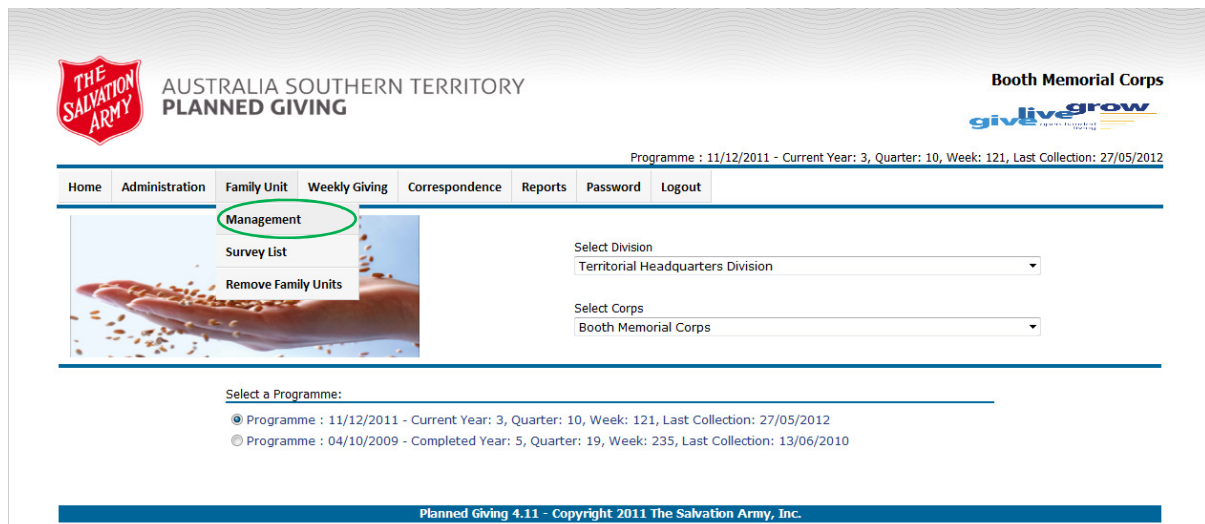
The Family Unit menu, is where all data is accessed that has anything to do with the Family Units activities in your Corps' Program. The data includes: name and address details, pledge participation and envelope numbers. Every Program has its own Family Unit data and changes to Family Unit data in one Program, will not affect another.

MANAGEMENT

The Family Unit Management, provides the facility to Manage the "directory" of your Corps' membership. All details that are necessary to maintain the data that is relevant for Planned Giving recording, monitoring and pledge participation, is contained within the Family Unit Management menu of the Online Recording System.

The data from this Management menu is exportable through the Survey List menu. The purpose of this is detailed later in this manual.

To Manage Family Units, click on Family Unit Management to access the Family Unit Management screen:



The screenshot shows the 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING' interface for 'Booth Memorial Corps'. The navigation menu includes 'Home', 'Administration', 'Family Unit', 'Weekly Giving', 'Correspondence', 'Reports', 'Password', and 'Logout'. The 'Family Unit' menu is expanded, showing 'Management' (highlighted with a green circle), 'Survey List', and 'Remove Family Units'. Below the menu, there are dropdown menus for 'Select Division' (Territorial Headquarters Division) and 'Select Corps' (Booth Memorial Corps). A 'Select a Programme:' section shows two options: 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012' (selected) and 'Programme : 04/10/2009 - Completed Year: 5, Quarter: 19, Week: 235, Last Collection: 13/06/2010'. The footer reads 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

From this screen you can Manage the Family Units of the Corps' current Program, by adding new family units, making family units inactive, reactivating inactive family units, altering details, adding or altering participation and adding or altering reductions to participations:


Family Unit Management
[Add New Family Unit](#)
[Search Family Unit](#)

Family Unit	Address	Suburb	Action
Brigadier Elroy Alpaca	39 Costa Rica Close	Pookie - Queensland	
Fanny Arbusckle	7 Wandering Walk	Pookie - Queensland	
Mrs Sandra Beachly	78 Pork Product Lane	Pookie - Queensland	
Mrs Gladys Boom Boom	c/o Humffray Street Post Office	Sebastopol - Victoria	
Envoy Karen Carpenter	99 Chip Road	Pookie - Queensland	
Major Sandra Clayton	C/o Post Office	Nhill - Victoria	
Allan Frederick	1 Worry Way	Pookie - Queensland	
Mr Al Grasby	33 Jonny Walker Rise	Pookie - Queensland	
Demonstration Helper	1 Useful Street	Pookie - Queensland	
Jim Johnson	1 Example Way	Red Cliffe - Queensland	
Hobson Kobertson	777 Sunshine Street	Pookie - Queensland	
Katrina Kosta	44 Fountain Freeway	Pookie - Queensland	
Colonel Highen Mighty	1 The Penthouse	Oz - Queensland	
Major Ernie Plecebo	12 Cattalonia Crescent	Pookie - Queensland	
Miss Gregory Pope	33 Carp Street	Pookie - Queensland	

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At some point in time (*after Pledge Sunday*) you may wish to flag a Family Unit as Inactive. This may mean that while a Family Unit may be happy to receive the teaching material on Giving, they are not willing to participate through envelope giving in the Program. To make them Inactive, click on the Inactivate Family Unit icon (*the red X*) and the Family Unit will be marked with a red dot to indicate that they are Inactive. To Reactivate a Family Unit that is marked as Inactive, click on the Reactivate Family Unit icon (*orange and green arrows*).

To edit the details of a Family Unit, click on the Change Family Details icon.


To add a new Family Unit to the data, click on the text, "Add New Family Unit":


Family Unit Management
Family Unit Detail

Salutation (Mr, Mrs, Rank):	Major
Forename:	Ernie
Surname:	Plecebo
CorrespondenceName:	Ernie
Address Line 1:	12 Cattalonia Crescent
Address Line 2:	
Suburb:	Pookie
State:	Queensland
Post Code:	7000
Mail:	Yes

Fill in the details and click the "OK" button. Clicking the "Cancel" button will return to the Family Unit Management screen without making any changes.

PARTICIPATION

Clicking on the Show Participation icon  in the Family Unit Management screen, takes you to the Participation management for a Family Unit:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps
givlivegrow
Australia Southern Territory
Mission Response Department

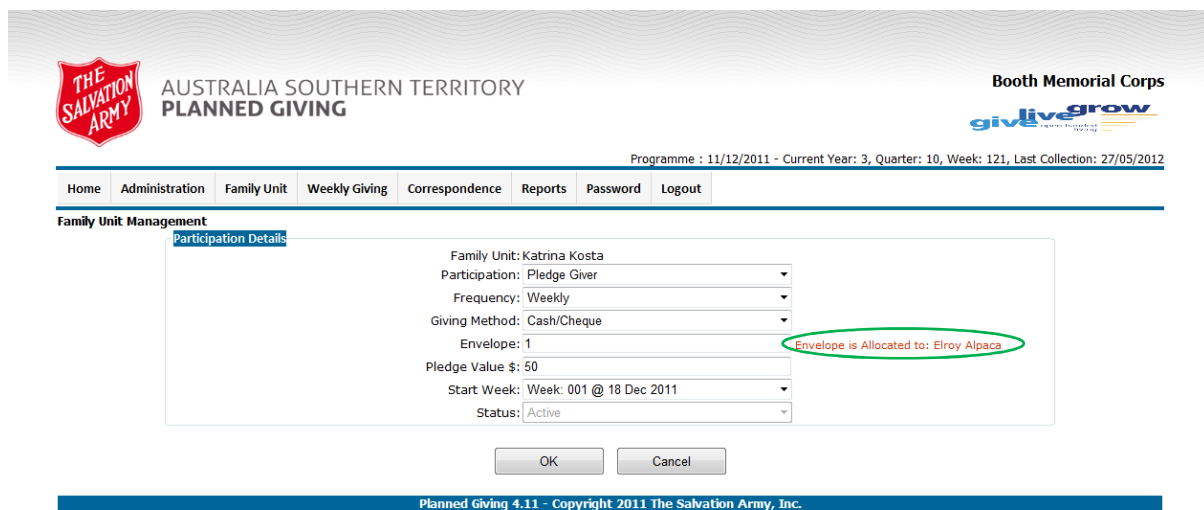
Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
[Add new participation for Katrina](#) Return to Family Unit

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

The above screen will appear for a Family Unit which has not yet had any Participation allocated to it. Click on the text, "Add new Participation for [name]", to add pledge information for this Family Unit.



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps
givlivegrow
Australia Southern Territory
Mission Response Department

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
Participation Details

Family Unit: Katrina Kosta
 Participation: Pledge Giver
 Frequency: Weekly
 Giving Method: Cash/Cheque
 Envelope: 1 Envelope is Allocated to: Elroy Alpaca
 Pledge Value \$: 50
 Start Week: Week: 001 @ 18 Dec 2011
 Status: Active

OK Cancel

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

When you are adding or editing Participation, the above window will display. Fill in the fields as are required.

Note: If, after entering an envelope number, the red text appears (*as circled above*) warning you that the number is currently in use by someone else, you must change the envelope number to another unallocated number, before you click OK. The Online Recording System ***will let you*** have multiple Family Units allocated to the same number, ***but this should never be done.***

Even if a Participation is by Envelope Only, an amount must be placed in the "Pledge Value \$" field, otherwise it is not saved. The amount should either be 0, or an estimate of what is anticipated from this Envelope Only participant. (*Currently \$5 per single, and \$10 per couple, unless otherwise known.*)

It is important that the Start Week is set correctly, especially if a Participation is being added later in the Program. Start Weeks that are set beyond the date they are intended to begin, require administrative intervention to rectify.

Once you have the details correct, click OK, which will save the Participation and return you to the Participation Management screen:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps
givelivegrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
Add new participation for Katrina Return to Family Unit

Period	Envelope	Participation	Frequency	Giving Method	Weekly Giving	Action
Since Week 1	16	Pledge Giver	Weekly	Cash/Cheque	\$50.00	 

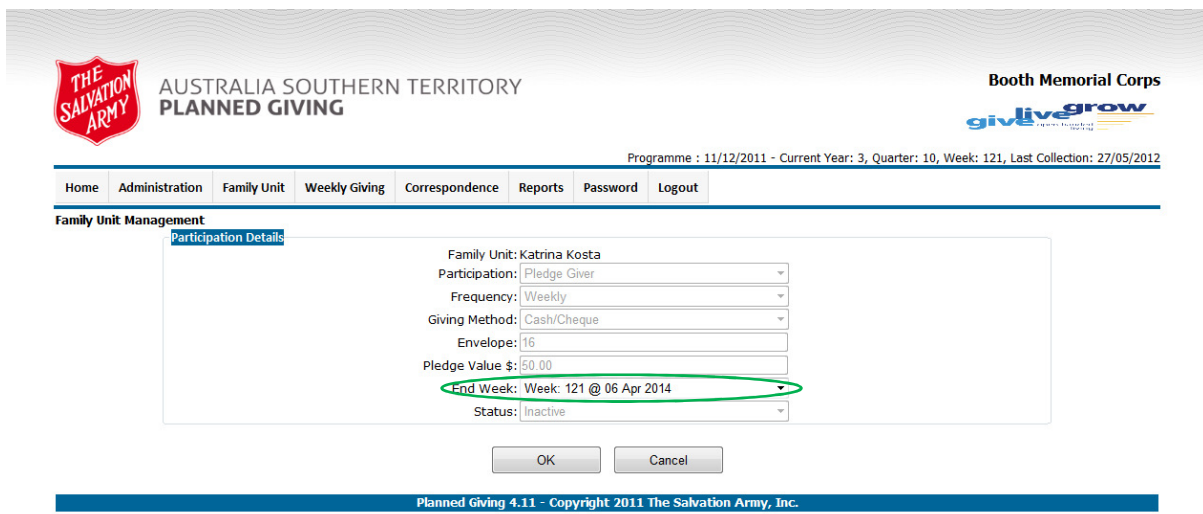
Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

The data displayed, now shows that for the specific Family Unit, their Participation begins from Week 1. They have been allocated cartridge envelope number 3, Participating as a pledge giver, on a weekly basis by cash or cheque in the offering, for an amount of \$50.00/wk. The Weekly Giving value is always shown here as being calculated per week, *(so fortnightly, monthly or any other frequency of Giving will show the calculated per week figure in this place)*.

If any details of this Participation need to change, then click on the Change Participation Details icon.

Change the details and click OK.

If at any time the Participation was to cease, then click on the Inactivate Participation Icon:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps
givelivegrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
Participation Details

Family Unit: Katrina Kosta

Participation: Pledge Giver

Frequency: Weekly

Giving Method: Cash/Cheque

Envelope: 16

Pledge Value \$: 50.00

End Week: Week: 121 @ 06 Apr 2014

Status: Inactive

OK Cancel

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Ensure that the End Week is set to the last week that the Family Unit Participated and click OK:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY **PLANNED GIVING** Booth Memorial Corps
 givegrow
 Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
 Add new participation for Katrina Return to Family Unit

Period	Envelope	Participation	Frequency	Giving Method	Weekly Giving	Action
001 - 010	16	Pledge Giver	Weekly	Cash/Cheque	\$50.00	 

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

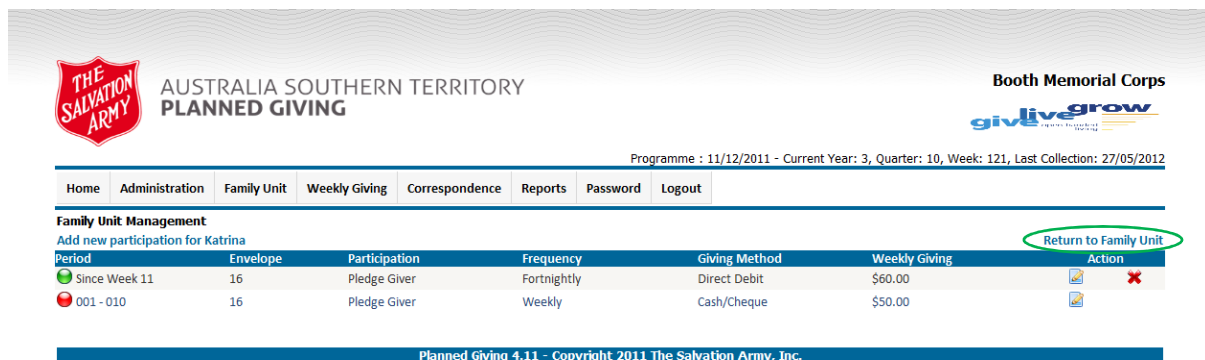
The Participation Management screen now shows that the Participation for this Family Unit was active from weeks 1 to 10, but is now marked as inactive (Red dot), meaning that no further weeks beyond week 10 will be able to be entered against this envelope number. While this is the only Participation for this Family Unit, this Participation can be reactivated by clicking on the Reactivate Participation icon and clicking OK. The Participation will now be shown with a Green dot and indicates the week from which this Participation commenced.

When a Family Unit requests a “change” to their Participation, this actually means, in general, that they are adding a new Participation. (They are Participating at a new level – thus, New Participation.) Click on “Add new Participation for [name of person]” in the Participation Management screen.

As before, the Participation details window will come up, where you will complete all of the required fields and click OK.

Note: A Participation Start Date can only be set to a date later than any previously existing Participation Start dates.







Once the details are correct, click OK:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY **PLANNED GIVING** Booth Memorial Corps
 givegrow
 Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
 Add new participation for Katrina Return to Family Unit

Period	Envelope	Participation	Frequency	Giving Method	Weekly Giving	Action
 Since Week 11	16	Pledge Giver	Fortnightly	Direct Debit	\$60.00	 
 001 - 010	16	Pledge Giver	Weekly	Cash/Cheque	\$50.00	 

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The Participation Management screen now shows that the Family Unit’s participation from week 1 through to week 10 was \$50.00/wk as shown in the previous example, and now from week 11, it is fortnightly, direct debit Giving of \$120.00, which equates to \$60.00/wk.


Essentially, this page is saying that an original participation, starting at week 1, of \$50.00 per week, has now “changed” to \$120.00 per fortnight, as from week 11.

Clicking on the text, “Return to Family Unit”, will take you back to the Family Unit Management screen.

REDUCTIONS

A Reduction provides the means to reduce the overall value of a Pledge. This is helpful when a Family Unit gets behind in their Giving and wishes to reduce their overall pledge value, so as to continue in their commitment without having to catch up the amount with which they are behind.

Clicking on the Show Reduction icon in the Family Unit Management screen, takes you to the Reduction management for a Family Unit:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps **give live grow**

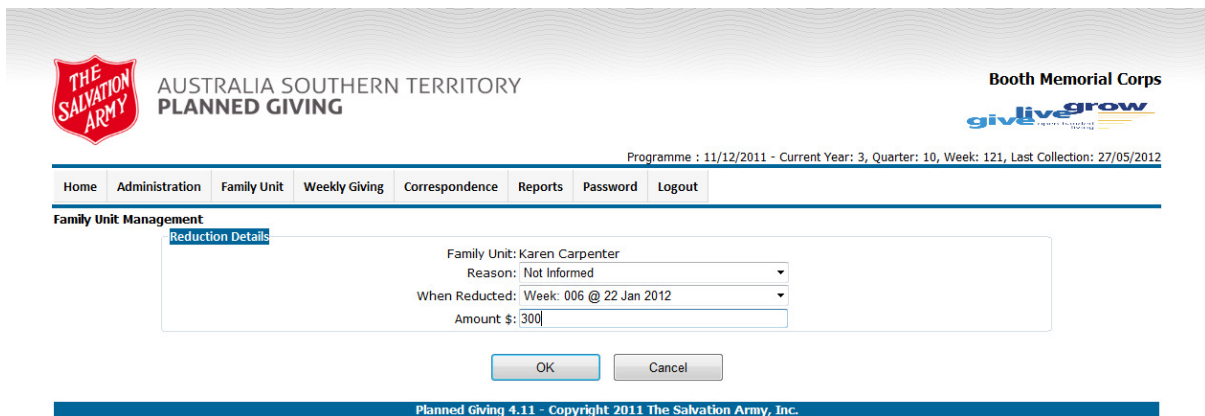
Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
[Add new reduction for Karen](#) Return to Family Unit

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

To add a Reduction, click on the text, "Add new reduction for ..." and this will bring up the screen for entering the Reduction information as shown below:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps **give live grow**

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
[Reduction Details](#)

Family Unit: Karen Carpenter
Reason: Not Informed
When Reduced: Week: 006 @ 22 Jan 2012
Amount \$: 300

OK Cancel

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Select a pre-determined reason from the Reason list, choose the week from when the Reduction needed to be applied and then enter the amount of the reduction. Clicking the "OK" button will save the Reduction. Clicking the "Cancel" button will exit without any Reduction being saved.



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps **give live grow**

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Management
[Add new reduction for Karen](#) Return to Family Unit

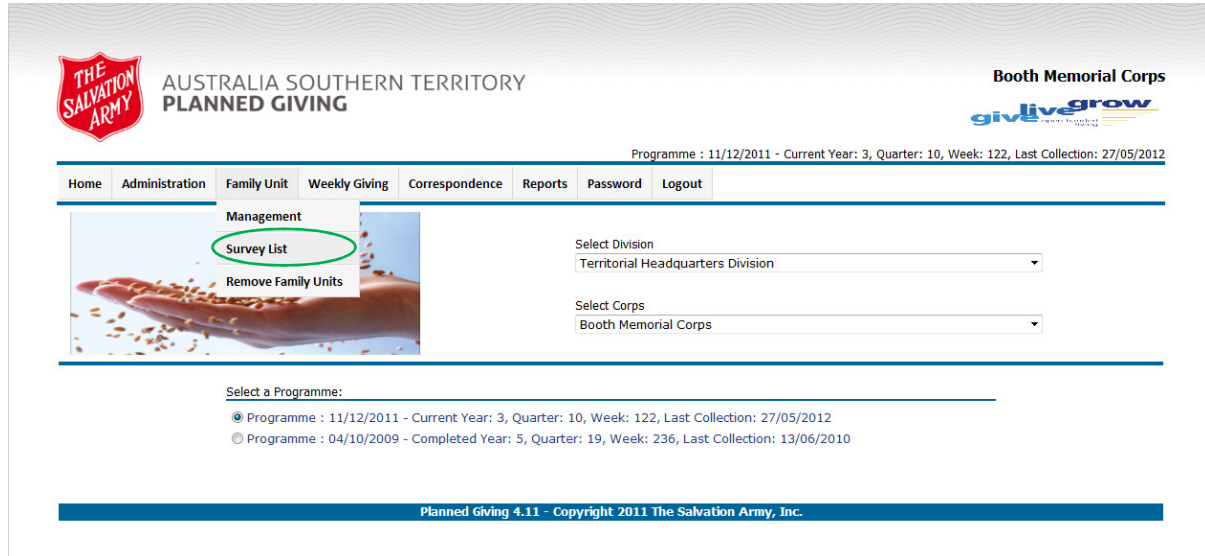
When Reduced	Reason for Reduction	Amount	Action
22/01/2012	Change in employment status	\$300.00	 

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

The overall value of the pledge has now been Reduced by the Reduction amount and this can be edited with the Change Reduction Details icon. The Reduction can be deleted by clicking on the Delete Reduction icon (*which in this circumstance is the Red X*). The weeks behind, in the reports, will now be adjusted by this Reduction value.

SURVEY LIST

The Survey List menu enables you to export the Family Unit data to an excel spreadsheet, so that mailing labels, and directory information can be utilised. To access this feature, click on the Family Unit, Survey List menu:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Management
Survey List
 Remove Family Units

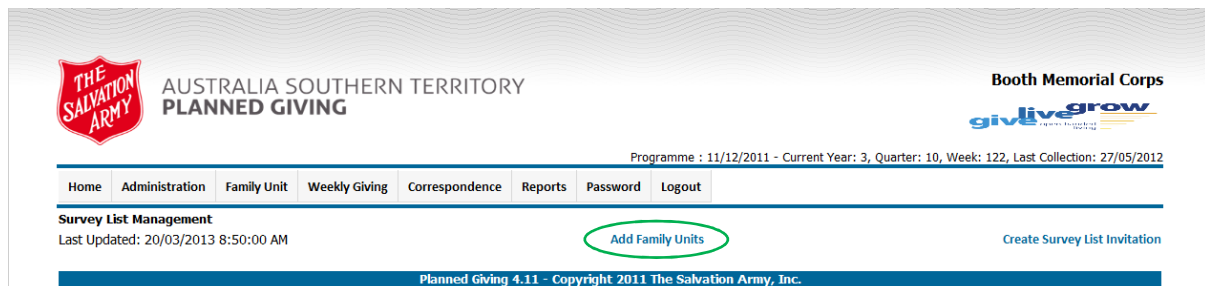
Select Division
Territorial Headquarters Division

Select Corps
Booth Memorial Corps

Select a Programme:
 Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012
 Programme : 04/10/2009 - Completed Year: 5, Quarter: 19, Week: 236, Last Collection: 13/06/2010

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If a Survey List has never been run for this Program, the following screen will appear:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

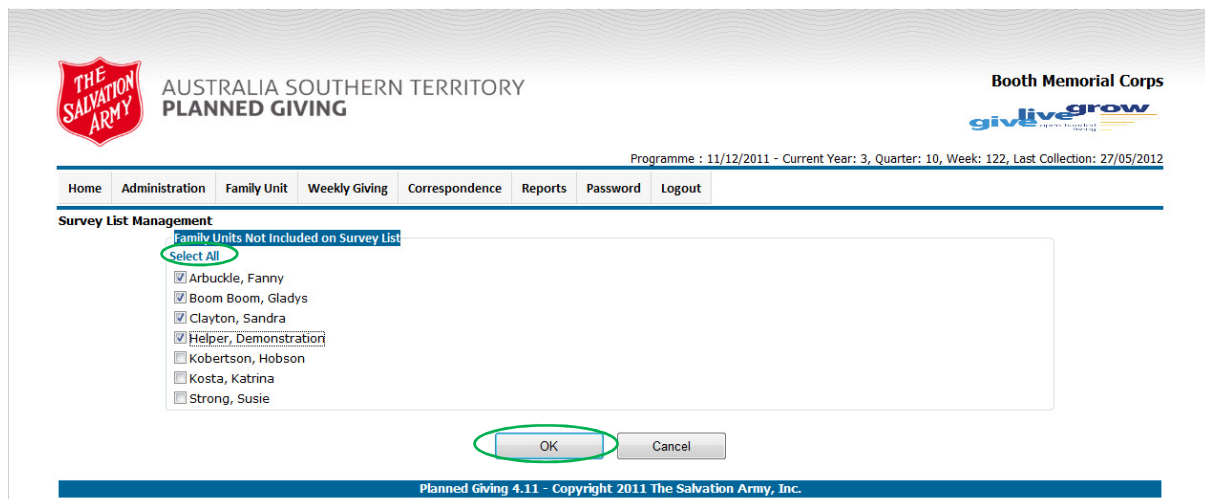
Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Survey List Management
 Last Updated: 20/03/2013 8:50:00 AM

Add Family Units Create Survey List Invitation

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

Although the Survey List data originates from the Family Unit data, it is a separate list. To add the Family Unit data to the Survey List, you must click on the text, "Add Family Units".



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Survey List Management

Family Units Not Included on Survey List

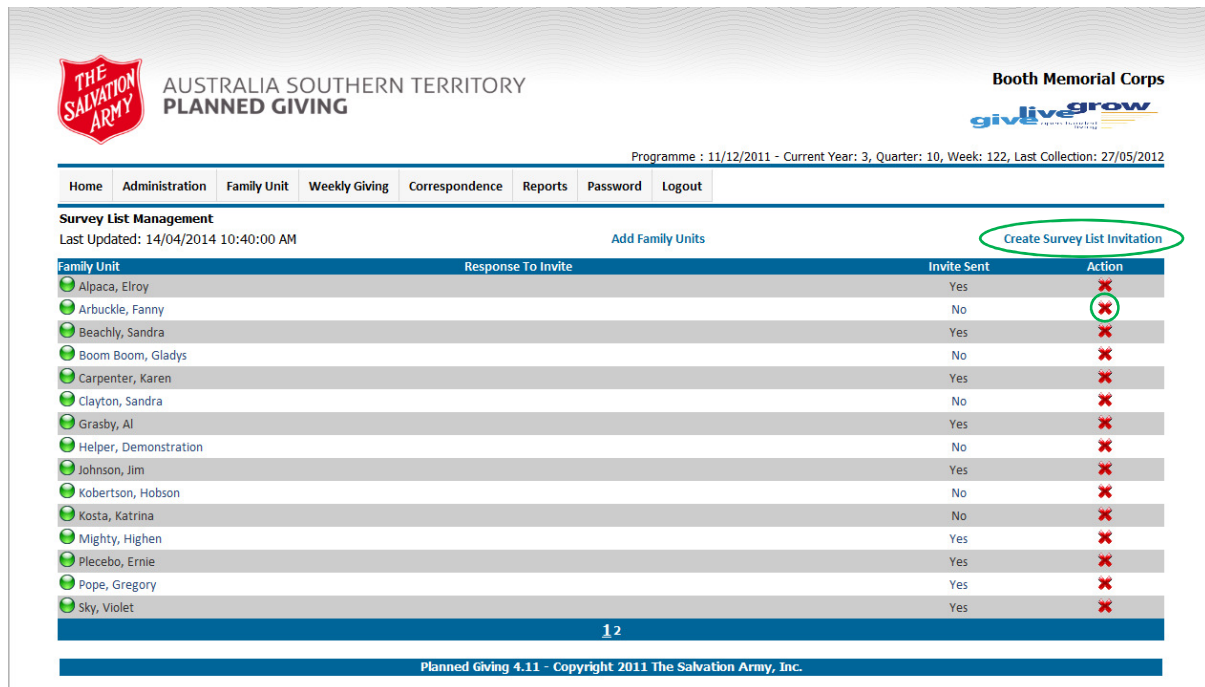
Select All

- Arbuckle, Fanny
- Boom Boom, Gladys
- Clayton, Sandra
- Helper, Demonstration
- Kobertson, Hobson
- Kosta, Katrina
- Strong, Susie

OK Cancel

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To select all the Family Units, click the text, "Select All", or click on each box to select those that you wish to include in the Survey List. Click OK.



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps
give live grow
Australia Southern Territory
Mission Resources Department

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Survey List Management
 Last Updated: 14/04/2014 10:40:00 AM

Add Family Units Create Survey List Invitation

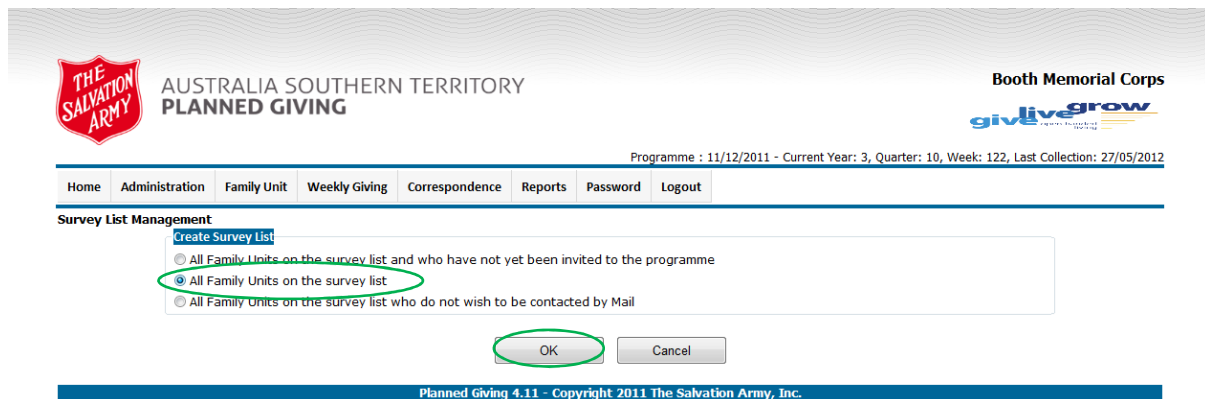
Family Unit	Response To Invite	Invite Sent	Action
Alpaca, Elroy	Yes	Yes	X
Arbuckle, Fanny	No	No	X
Beachly, Sandra	Yes	Yes	X
Boom Boom, Gladys	No	No	X
Carpenter, Karen	Yes	Yes	X
Clayton, Sandra	No	No	X
Grasby, Al	Yes	Yes	X
Helper, Demonstration	No	No	X
Johnson, Jim	Yes	Yes	X
Kobertson, Hobson	No	No	X
Kosta, Katrina	No	No	X
Mighty, Highen	Yes	Yes	X
Plecebo, Ernie	Yes	Yes	X
Pope, Gregory	Yes	Yes	X
Sky, Violet	Yes	Yes	X

12

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The Family Units have now been transferred to the Survey List.

Note: Anytime a new Family Unit is added to the Program, it will need to be added to the Survey List as well, in order to export its data. Family Units can be excluded from the export, by clicking on the Inactivate Survey List icon next to their name (red X). To export the Family Unit Data, click the text, "Create Survey List Invitation".



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps
give live grow
Australia Southern Territory
Mission Resources Department

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Survey List Management

Create Survey List

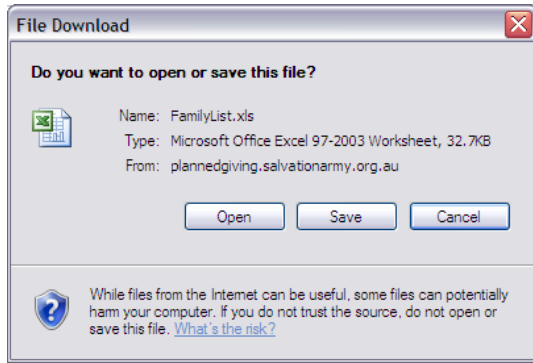
All Family Units on the survey list and who have not yet been invited to the programme
 All Family Units on the survey list
 All Family Units on the survey list who do not wish to be contacted by Mail

OK Cancel

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

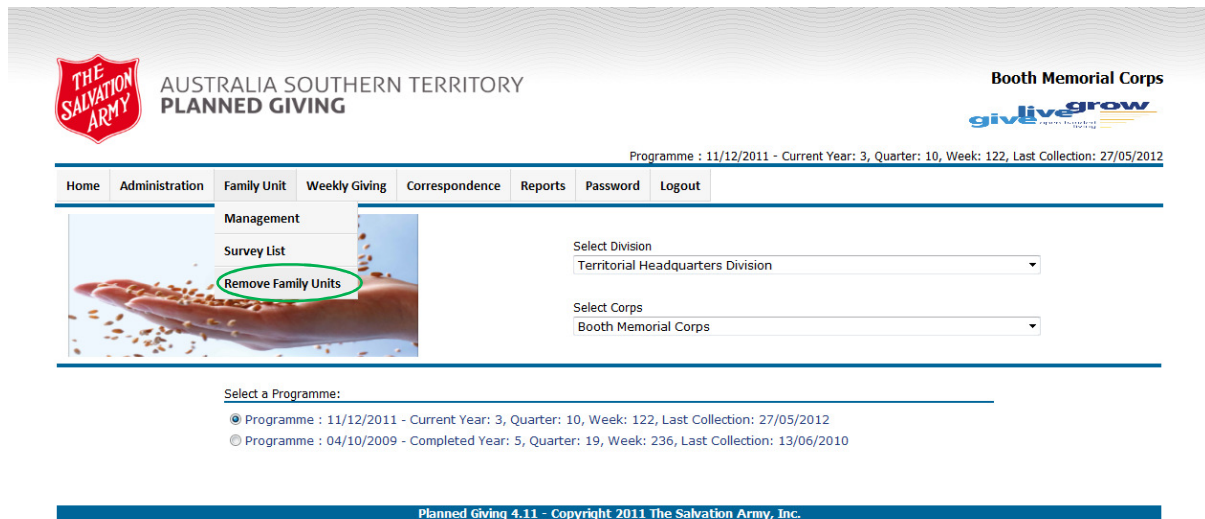
To export the entire Family Unit data that is currently in the Survey List, select "All Family Units on the Survey list" and click OK.

The following window will pop up where you can choose to either open the exported data into Windows Excel, or 'Save' it as a file to be opened later:

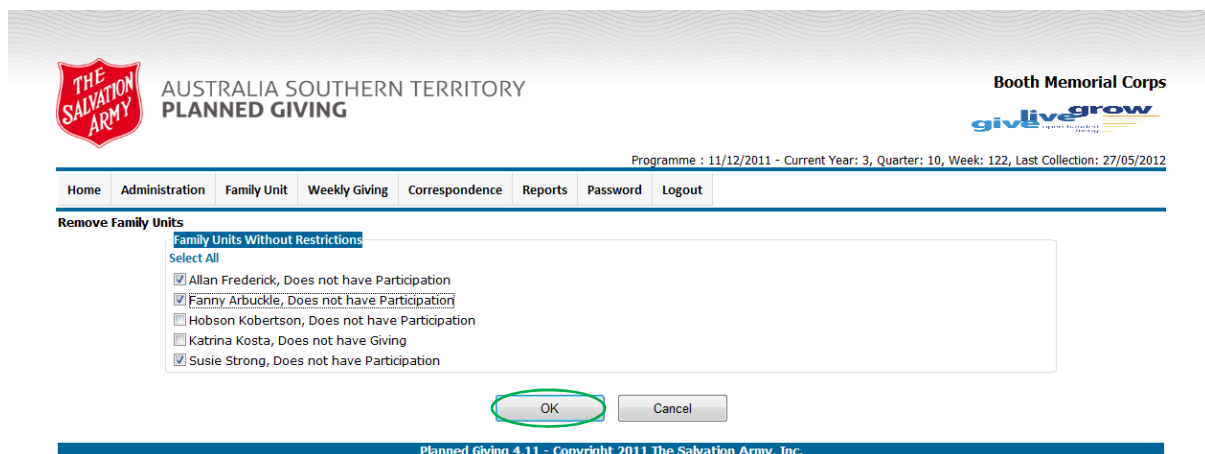


REMOVE FAMILY UNITS

This menu enables you to remove Family Units from the Program. Family Units who have participated in the Program with Giving data recorded against them, cannot be removed and will not be suggested as candidates for removal. To access this feature, click the Family Unit, Remove Family Units menu:



The following list of names will appear, with the reason as to why they are available for removal:



You can click the text, "Select All" to select all of the names, or click the individual tick boxes next to the names that you want removed. Click 'OK' when you have selected the names of those that you wish to remove.



Remove Family Units

The following Family Units will be removed

Allan Frederick, Does not have Participation
Fanny Arbuckle, Does not have Participation
Susie Strong, Does not have Participation

The above screen appears, to confirm the names of those that you have selected for removal.

Clicking OK will remove the Family Units from the Program.

Note: Be careful using this function, because the name and details will have to be completely re-entered if removed by accident.

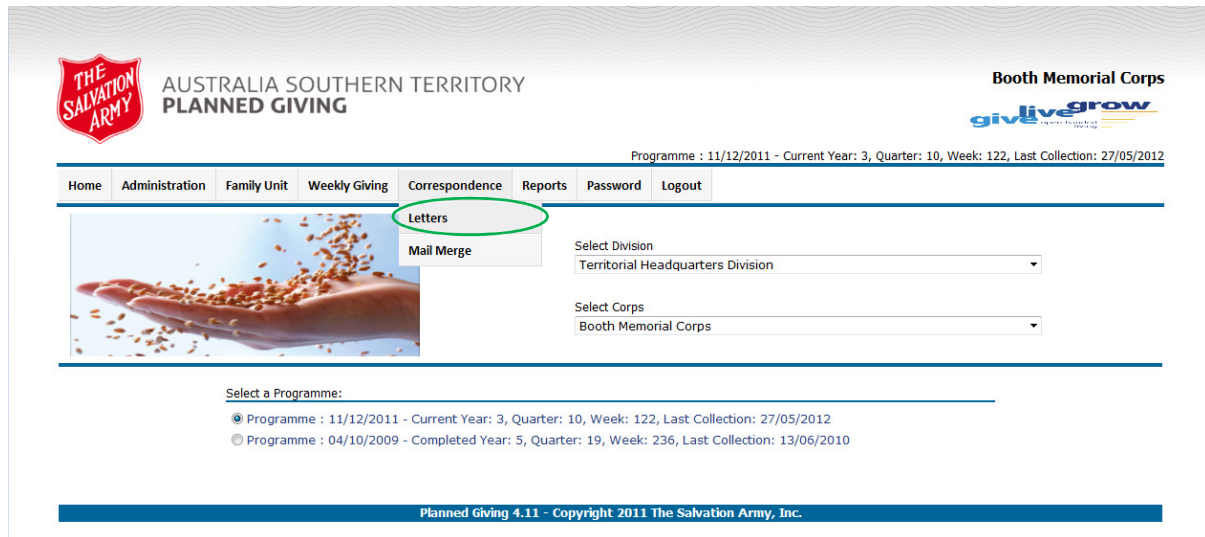
CORRESPONDENCE

The Correspondence menu provides simple mail merge facilities so that quarterly letters can be produced to inform Family Units of progress through the Planned Giving Program.

LETTERS

The Letters are part of the Corps' data and therefore span across Programs, meaning that the same letter can be used over many Programs, over many years.

To access the Letters, click on the Correspondence, Letters menu:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps givlivegrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving **Correspondence** Reports Password Logout

Letters (highlighted)

Mail Merge

Select Division
Territorial Headquarters Division

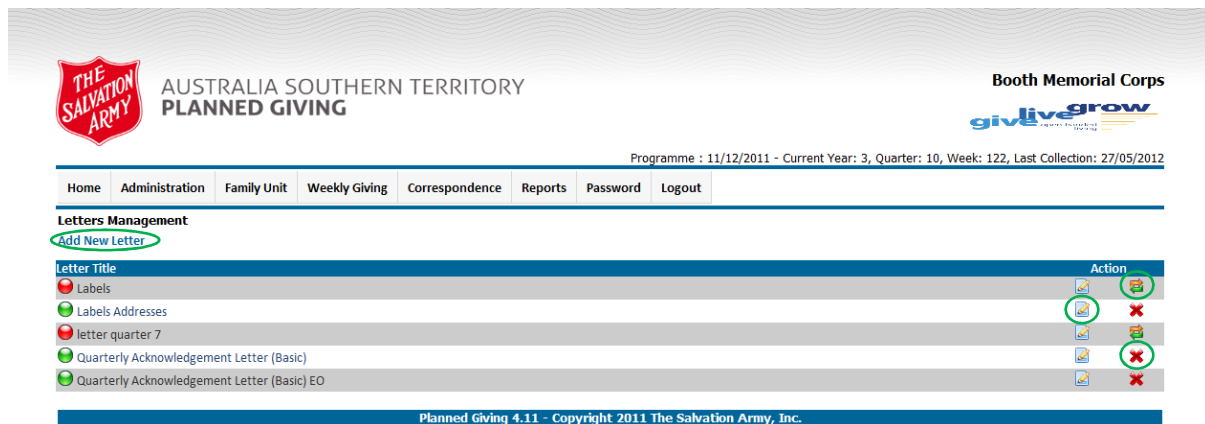
Select Corps
Booth Memorial Corps

Select a Programme:

- Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012
- Programme : 04/10/2009 - Completed Year: 5, Quarter: 19, Week: 236, Last Collection: 13/06/2010

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The Letters are displayed where they can be changed, inactivated, reactivated or a new Letter can be added.













THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps givlivegrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Letters Management

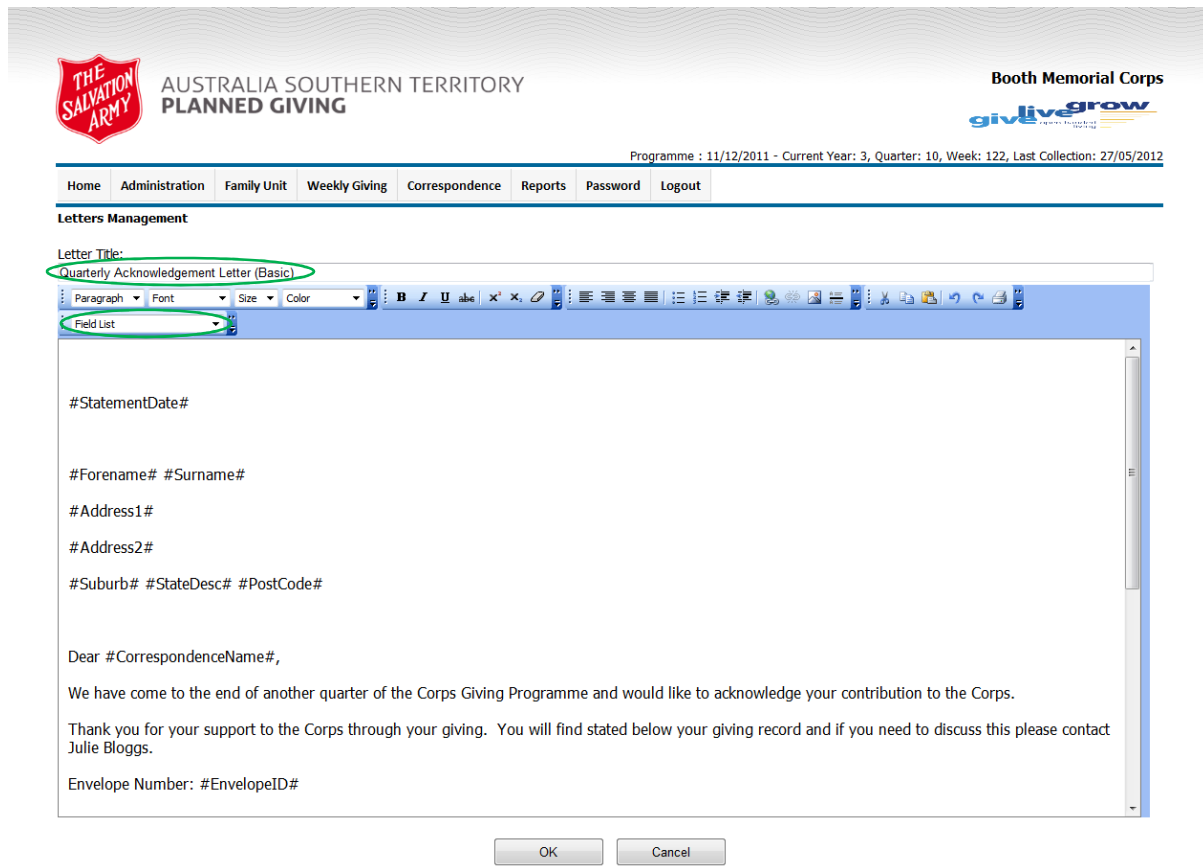
Add New Letter (highlighted)

Letter Title	Action
Labels	 
Labels Addresses	 
letter quarter 7	 
Quarterly Acknowledgement Letter (Basic)	 
Quarterly Acknowledgement Letter (Basic) EO	 

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When a Letter is deactivated, a red dot appears next to its name, instead of the normal green dot. This means that the Letter will not be available for merging from the Mail Merge facility. To reactivate a deactivated Letter, click on the Reactivate Letter icon (*orange and green arrows*). To deactivate a Letter, click on the Inactivate Letter icon (*red X*). To change a Letter, click on the Change Letter Text icon.

When changing or adding a new Letter, the following screen will appear:



When adding a new Letter, ensure that a title is entered in to the Letter Title entry box at the top, otherwise the Letter will not save, because it has not been given a name.

All the merge-able fields are available to be inserted in the Letter using the “Field List” pull-down menu. Selecting a field from this list will insert it in the Letter at the current cursor position, within the text editing window. The merge fields appear as text in the Letter surrounded by the # character.

When you feel that your Letter is complete, scroll down and click the OK button to save it.

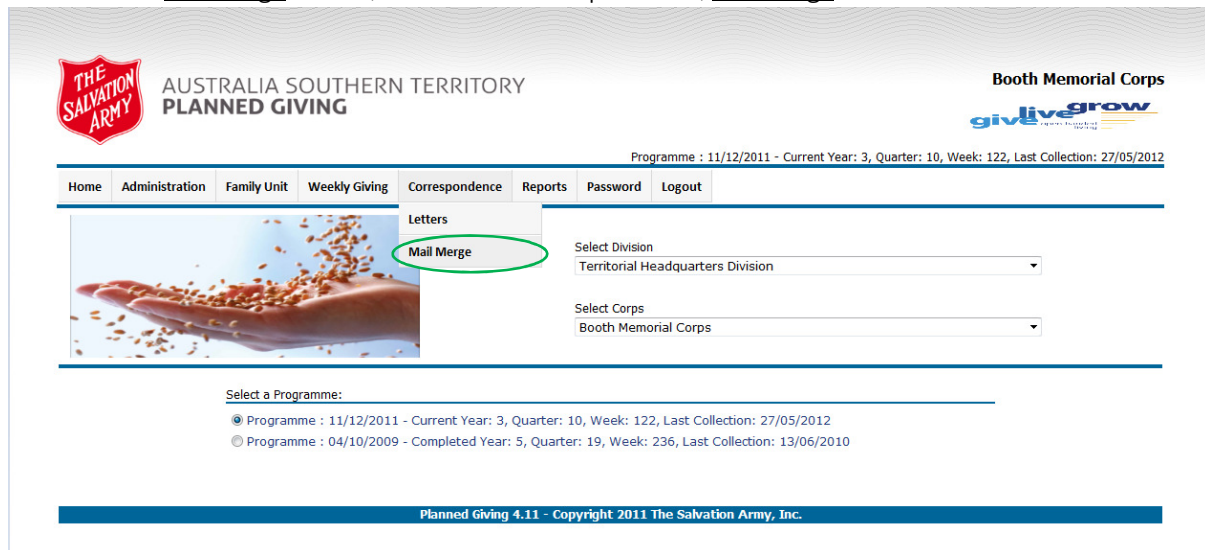
The provision of the Letter editing facility within the Online Recording System is not to provide the power of a full Word Processing system, but rather to provide the means of reporting to the Family Units, the progress of their participation in the Planned Giving Program. For this reason, the text editing capabilities of the Letter editing should always be viewed as “simple” text editing and nothing more. Provision for the inclusion of graphics, like signatures and headers, is not available; however these can be accommodated by printing these onto plain paper first by an external Word Processing system and then treating the pre-printed paper as letterhead, with the Mail Merge facility.

MAIL MERGE

The Mail Merge provides the ability to produce letters to the participants in the Program, which reports on their progress. This facility uses the Letters prepared (*As in the previous Section entitled “Letters”*) under the Letters menu. It also allows you to select which quarter you want the data extracted from, and a further selection criterion to allow you to choose which data is merged into the final resultant letters.

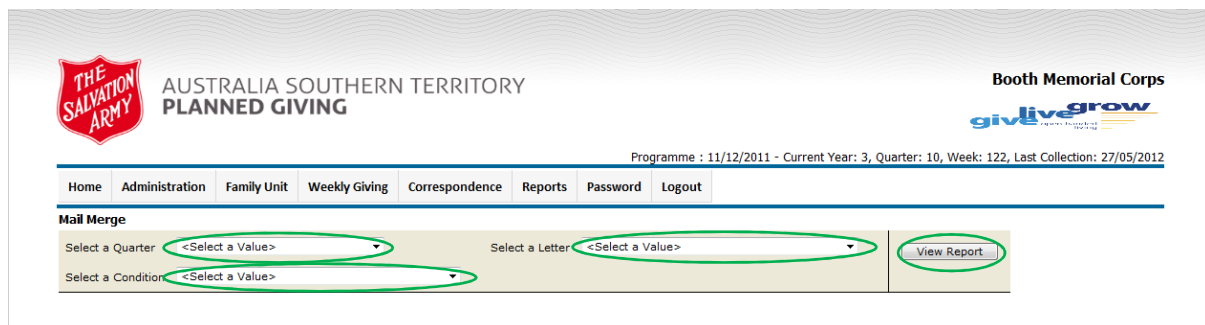
Although the preparation of the letter is provided through the means of a simple text editor system, the mail merge facility provides a powerful tool to selectively produce reporting letters to the Family Units participating in the Program. The Mail Merge is very reliant on a quality letter form and simple text.

To access the Mail Merge feature, click on the Correspondence, Mail Merge menu:



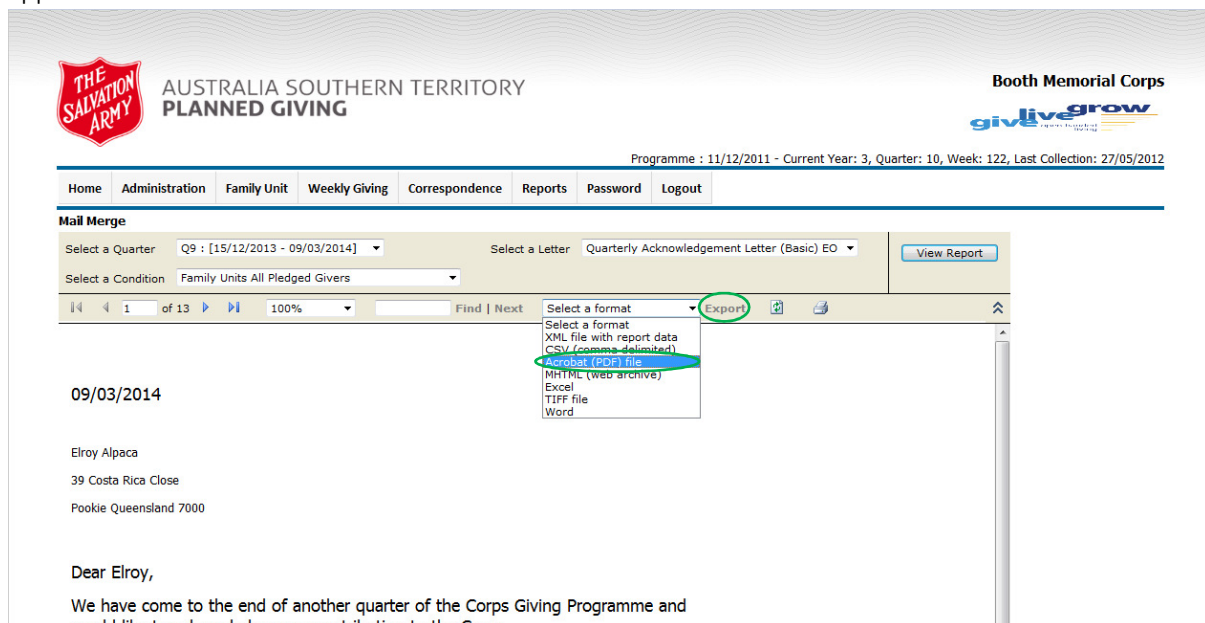
The screenshot shows the 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING' interface. The 'Correspondence' menu is open, and the 'Mail Merge' option is highlighted with a green circle. To the right, there are dropdown menus for 'Select Division' (Territorial Headquarters Division) and 'Select Corps' (Booth Memorial Corps). Below these, there are radio buttons for selecting a programme: 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012' (selected) and 'Programme : 04/10/2009 - Completed Year: 5, Quarter: 19, Week: 236, Last Collection: 13/06/2010'. The footer reads 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

The following screen will appear, which has the feel of a report screen, where you can select the merge criterion:



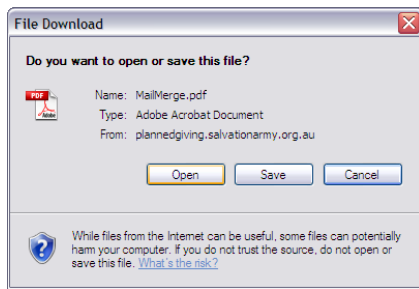
The screenshot shows the 'Mail Merge' screen. It features three dropdown menus: 'Select a Quarter' (set to '<Select a Value>'), 'Select a Letter' (set to '<Select a Value>'), and 'Select a Condition' (set to '<Select a Value>'). A 'View Report' button is located to the right of the dropdowns. The interface includes the same header and navigation as the previous screenshot.

From this screen, select the Quarter and Condition that you want the merge data to come from, and then select the Letter that you want the data merged into. Click the View Report button. The merged letters will appear as shown below:



The screenshot shows the 'Mail Merge' screen with the 'View Report' button clicked. The 'Select a Quarter' dropdown is set to 'Q9 : [15/12/2013 - 09/03/2014]' and 'Select a Condition' is set to 'Family Units All Pledged Givers'. The 'Select a Letter' dropdown is set to 'Quarterly Acknowledgement Letter (Basic) EO'. An 'Export' button is highlighted with a green circle, and a dropdown menu is open showing options: 'Select a format', 'XML file with report data', 'CSV (comma delimited)', 'Acrobat (PDF file)', 'MHTML (web archive)', 'Excel', 'TIFF file', and 'Word'. Below the dropdown, the merged letter content is displayed, starting with the date '09/03/2014' and the recipient address: 'Elroy Alpaca, 39 Costa Rica Close, Pookie Queensland 7000'. The letter begins with 'Dear Elroy,' and the first line of the body text is 'We have come to the end of another quarter of the Corps Giving Programme and would like to acknowledge your contribution to the Corps'.

To view and print these letters as one letter per page, select the Export file format as, "Acrobat (PDF) file" and click on the text, "Export" next to it.



Click on the Open button and the file will launch into Acrobat Reader, where you can view each entry and print all or selected letters.

REPORTS

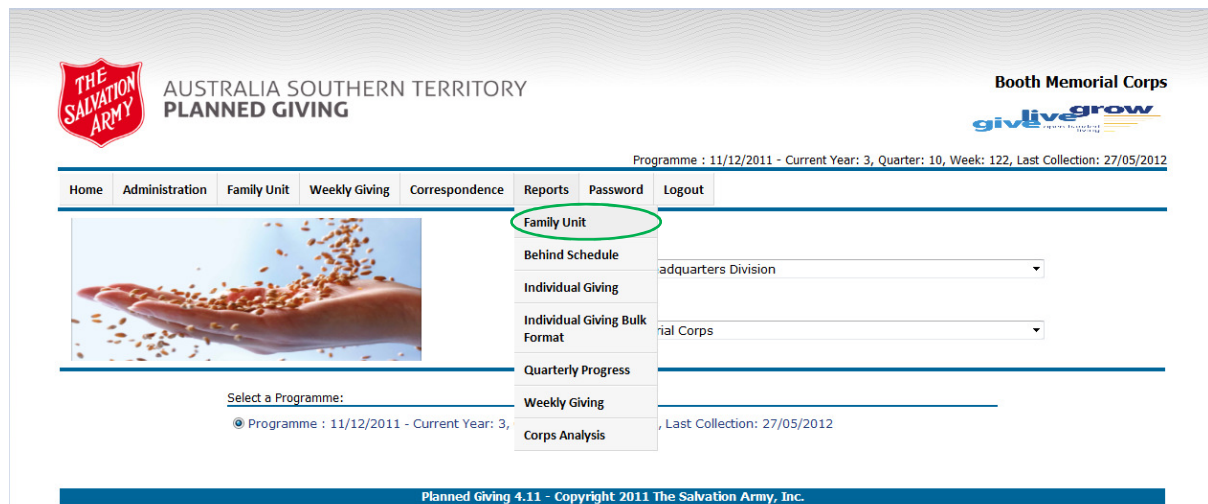
For Corps Recorder Users, there are a number of reports that are available to provide reporting capabilities of the Planned Giving data for a Corps. It must be remembered, that reports only provide feedback on data inputted into the Recording System. When giving data is entered on a weekly basis, and kept as up to date as possible, the reports will have the greatest impact for providing a well maintained and monitored 3-Year Giving Cycle.

FAMILY UNIT REPORT

The Family Unit Report provides details of all Family Units who are currently participating through pledge Giving or envelope only Giving. This report details: The envelope number, Family Unit Names, participation type, the original value of the participation and the current value of the participation.

This report provides the quickest method of finding the name associated with an envelope number. It also provides an 'expected' total weekly figure from pledge givers at the bottom of the report.

To access this report click on the Report, Family Unit menu:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit

Behind Schedule

Individual Giving

Individual Giving Bulk Format

Quarterly Progress

Weekly Giving

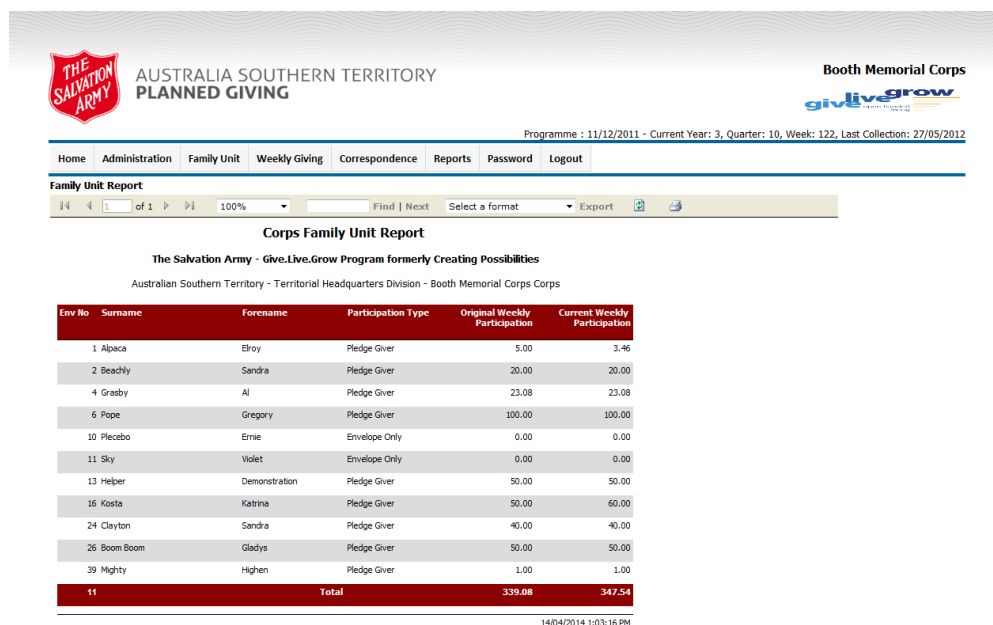
Corps Analysis

Select a Programme:

Programme : 11/12/2011 - Current Year: 3,

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

The following report will be displayed:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit Report

1 of 1 100% Find | Next Select a format Export

Corps Family Unit Report

The Salvation Army - Give.Live.Grow Program formerly Creating Possibilities

Australian Southern Territory - Territorial Headquarters Division - Booth Memorial Corps Corps

Env No	Surname	Forename	Participation Type	Original Weekly Participation	Current Weekly Participation
1	Alpaca	Elroy	Pledge Giver	5.00	3.46
2	Beachly	Sandra	Pledge Giver	20.00	20.00
4	Grasby	Al	Pledge Giver	23.08	23.08
6	Pope	Gregory	Pledge Giver	100.00	100.00
10	Plecebo	Ernie	Envelope Only	0.00	0.00
11	Sky	Violet	Envelope Only	0.00	0.00
13	Helper	Demonstration	Pledge Giver	50.00	50.00
16	Kosta	Kabrina	Pledge Giver	50.00	60.00
24	Clayton	Sandra	Pledge Giver	40.00	40.00
26	Boom Boom	Gladys	Pledge Giver	50.00	50.00
39	Mighty	Highen	Pledge Giver	1.00	1.00
11		Total		339.08	347.54

14/04/2014 1:03:16 PM

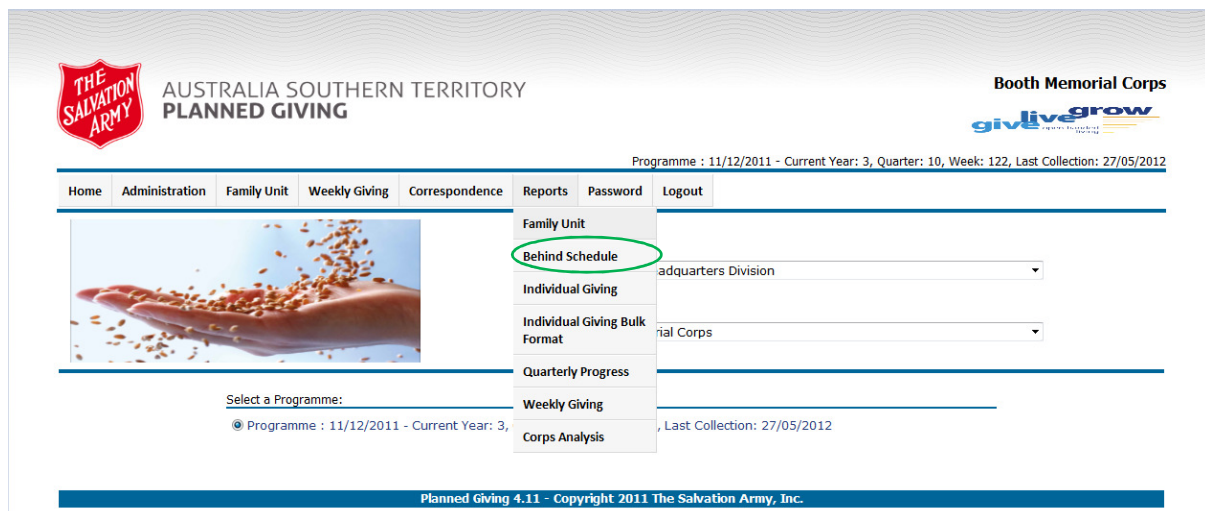
This report can be exported in the available file export formats and printed.

BEHIND SCHEDULE REPORT

The Behind Schedule Report provides a detailed report of the current status of participants who are behind, measured against what they have pledged. This Report is different from all other reports found in the Recording System, in that it calculates on the most recent Sunday's date, whether the Giving data has been entered or not. This means that if the report is run before the most recent Sunday's Giving data has been entered, then participation will be behind by the amount of un-entered weeks.

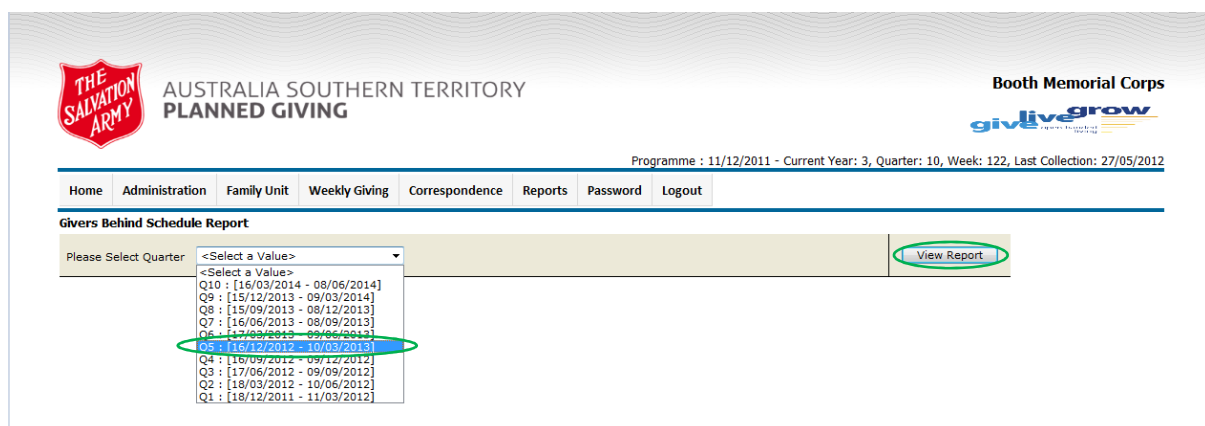
This report provides the means for the Corps Recorder to identify Family Units that may require a pastoral response.

To access this report, click on the Report, Behind Schedule menu:



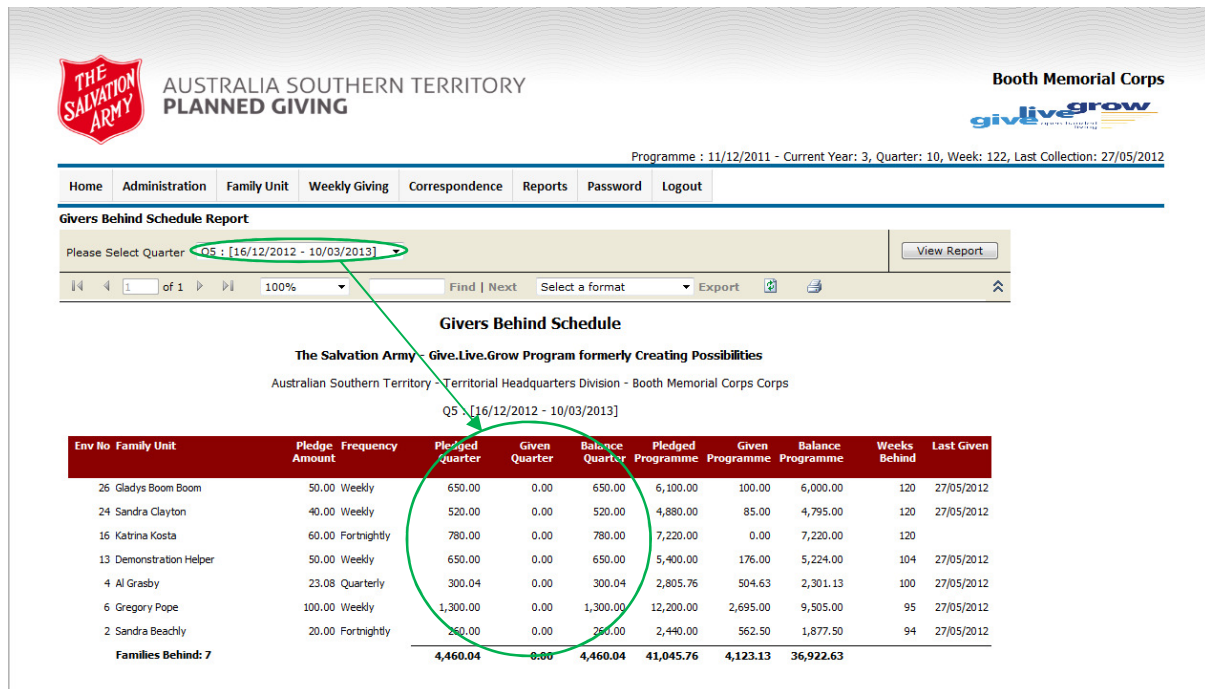
The screenshot shows the 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING' web interface. The top navigation bar includes 'Home', 'Administration', 'Family Unit', 'Weekly Giving', 'Correspondence', 'Reports', 'Password', and 'Logout'. The 'Reports' menu is open, and 'Behind Schedule' is highlighted with a green circle. Other menu items include 'Family Unit', 'Individual Giving', 'Individual Giving Bulk Format', 'Quarterly Progress', 'Weekly Giving', and 'Corps Analysis'. The page also displays 'Booth Memorial Corps', 'givelivegrow' logo, and program details: 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012'. A footer note reads 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

The following screen will appear, requiring you to select a quarter.



The screenshot shows the 'Givers Behind Schedule Report' screen. It features a dropdown menu labeled 'Please Select Quarter' with a '<Select a Value>' placeholder. The dropdown list contains several quarters, with 'Q5 : [18/12/2011 - 10/03/2012]' highlighted with a green circle. A 'View Report' button is also visible and highlighted with a green circle. The page header and navigation bar are identical to the previous screenshot, including the 'Booth Memorial Corps' and 'givelivegrow' branding, and the program details: 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012'.

Select a quarter and then click the View Report button:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Givers Behind Schedule Report

Please Select Quarter **Q5 : [16/12/2012 - 10/03/2013]**

1 of 1 100% Find | Next Select a format Export

Givers Behind Schedule

The Salvation Army - Give.Live.Grow Program formerly Creating Possibilities

Australian Southern Territory - Territorial Headquarters Division - Booth Memorial Corps Corps

Q5 : [16/12/2012 - 10/03/2013]

Env No	Family Unit	Pledge Amount	Frequency	Pledged Quarter	Given Quarter	Balance Quarter	Pledged Programme	Given Programme	Balance Programme	Weeks Behind	Last Given
26	Gladys Boom Boom	50.00	Weekly	650.00	0.00	650.00	6,100.00	100.00	6,000.00	120	27/05/2012
24	Sandra Clayton	40.00	Weekly	520.00	0.00	520.00	4,880.00	85.00	4,795.00	120	27/05/2012
16	Katrina Kosta	60.00	Fortnightly	780.00	0.00	780.00	7,220.00	0.00	7,220.00	120	
13	Demonstration Helper	50.00	Weekly	650.00	0.00	650.00	5,400.00	176.00	5,224.00	104	27/05/2012
4	Al Grasby	23.08	Quarterly	300.04	0.00	300.04	2,805.76	504.63	2,301.13	100	27/05/2012
6	Gregory Pope	100.00	Weekly	1,300.00	0.00	1,300.00	12,200.00	2,695.00	9,505.00	95	27/05/2012
2	Sandra Beachly	20.00	Fortnightly	260.00	0.00	260.00	2,440.00	562.50	1,877.50	94	27/05/2012
Families Behind: 7				4,460.04	0.00	4,460.04	41,045.76	4,123.13	36,922.63		

It is important to note the following:

- The Pledge Amount column is always calculated as the weekly value of the pledge;
- The Pledged Quarter, Given Quarter and Balance Quarter columns, are the ONLY columns that are affected by the selected Quarter;
- All other data in this report is calculated to the most recent actual Sunday.

This report can be exported in the available file export formats and printed.

INDIVIDUAL GIVING REPORT

The Individual Giving Report provides a 'personal statement of giving' to a participant. This is usually provided on request; however, it can also be the primary means of communicating personal giving, if required. The Individual Giving Report provides complete detail of the selected Family Unit's Giving and participation information. It is a form of statement that replicates exactly the data that has been entered.

To access this report click on the Report, Individual Giving menu:

The following screen will appear requiring you to select an individual Family Unit.

Select an individual Family Unit and then click the View Report button:


[Home](#) | [Administration](#) | [Family Unit](#) | [Weekly Giving](#) | [Correspondence](#) | [Reports](#) | [Password](#) | [Logout](#)
Individual Giving Report

 Select Family Unit:
 1 of 1 | 100% | Find | Next | Select a format | Export

Individual Giving Report
The Salvation Army - Give.Live.Grow Program formerly Creating Possibilities
 Australian Southern Territory - Territorial Headquarters Division - Booth Memorial Corps Corps

Alpaca, Elroy
Original Pledge: \$5.00

Participation Detail:

Date	Participation	Frequency	Giv Method	Value	Env ID	Start Week	End Week	Status
18/12/2011	Pledge Giver	Weekly	Cash/Cheque	5.00	1	1	20	Inactive
16/09/2012	Pledge Giver	Weekly	Cash/Cheque	30.00	1	40	71	Inactive
12/05/2013	Pledge Giver	Monthly	Internet Banking	3.46	1	74		Active

Reductions:

Date	Reason	Amount
19/05/2013	Not Informed	932.26

Participation Summary:

Total Reduction:	932.26
Total Pledged:	297.28
Amount Required to bring pledge to date:	0.00
Total Given - Pledge:	440.00

Contributions:

Q1: \$320.00

18/12/11	25/12/11	01/01/12	08/01/12	15/01/12	22/01/12	29/01/12	05/02/12	12/02/12	19/02/12	26/02/12	04/03/12	11/03/12
20.00	20.00	20.00	20.00	20.00	50.00	20.00	20.00	20.00	20.00	20.00	20.00	50.00

Q2: \$120.00

18/03/12	25/03/12	01/04/12	08/04/12	15/04/12	22/04/12	29/04/12
15.00	0.00	0.00	100.00	0.00	0.00	5.00

This report details all Giving and participation for the individual Family Unit that has been selected.

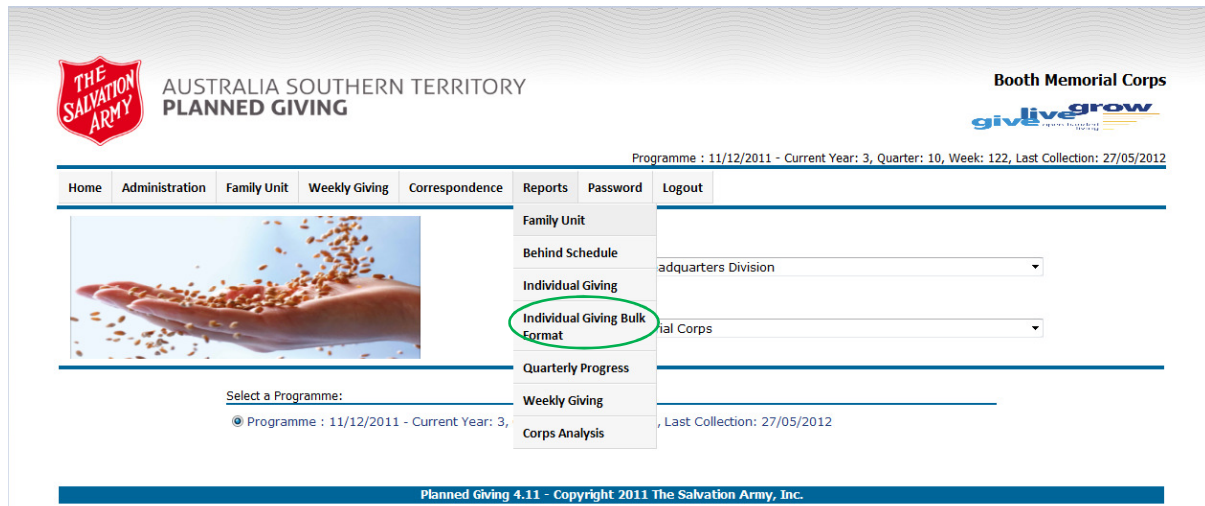
The value of the pledge in this report is always calculated and displayed as the weekly amount.

This report can be exported in the available file export formats and printed.

INDIVIDUAL GIVING BULK FORMAT REPORT

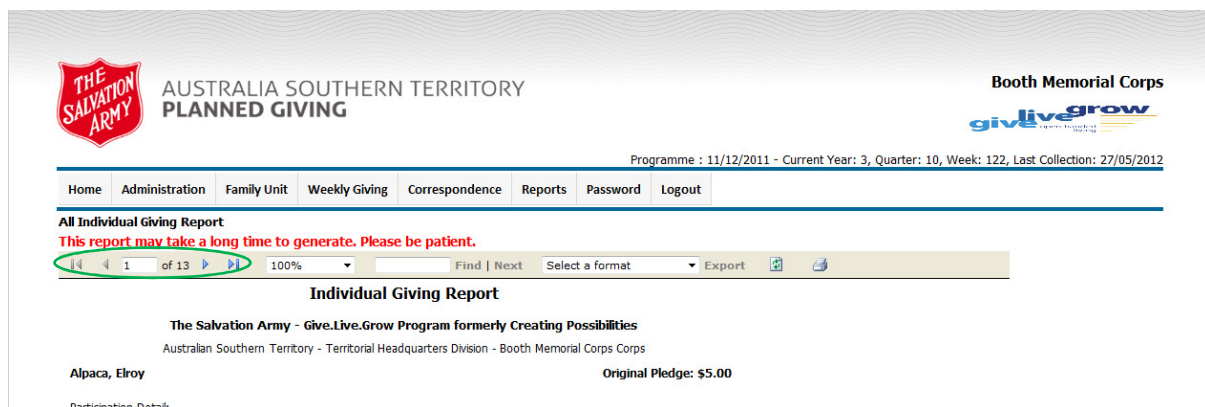
This report provides the capability of producing multiple single reports, for all participants Individual Giving Reports. *(This may be very valuable should a Corps Officer wish to inform all participants at the same time – as an example: Some financial crisis has occurred whereby finance locals need to indicate transparency or good accountability).*

To access this report, click on the Report, Individual Giving Bulk Format menu:



Note that unlike the Individual Giving Report where you first select a participant, this report launches immediately – generating the Individual Giving Report of all participants.

Note also that there is a **warning in red** that the report may take time to generate, depending on the number of participants that you have in your Corps. Please be patient.



Any record (*participant*) can now be selected and the report can be exported in the various supported file formats for bulk printing.

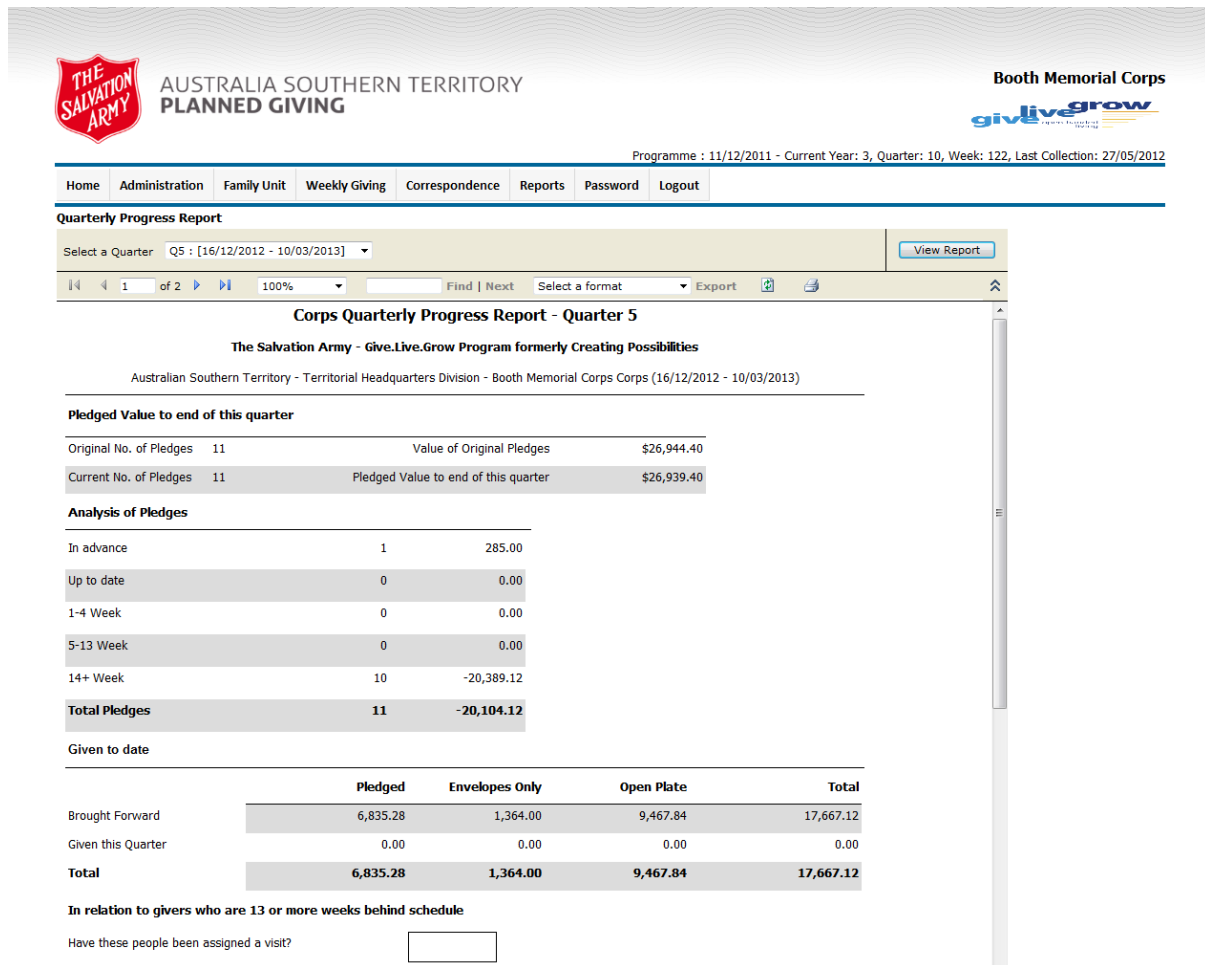
QUARTERLY PROGRESS REPORT

The Quarterly Progress Report is a detailed report of the Corps' Planned Giving progress within a selected quarter. It presents a cumulative 'picture' over multiple quarters during the program.

To access this report, click on the Report, Quarterly Progress menu:

The following screen will appear, requiring you to select a quarter.

Select a quarter and then click the View Report button:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING

Booth Memorial Corps

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Quarterly Progress Report

Select a Quarter Q5 : [16/12/2012 - 10/03/2013] [View Report](#)

1 of 2 100% Find | Next Select a format Export

Corps Quarterly Progress Report - Quarter 5

The Salvation Army - Give.Live.Grow Program formerly Creating Possibilities

Australian Southern Territory - Territorial Headquarters Division - Booth Memorial Corps (16/12/2012 - 10/03/2013)

Pledged Value to end of this quarter

Original No. of Pledges	11	Value of Original Pledges	\$26,944.40
Current No. of Pledges	11	Pledged Value to end of this quarter	\$26,939.40

Analysis of Pledges

In advance	1	285.00
Up to date	0	0.00
1-4 Week	0	0.00
5-13 Week	0	0.00
14+ Week	10	-20,389.12
Total Pledges	11	-20,104.12

Given to date

	Pledged	Envelopes Only	Open Plate	Total
Brought Forward	6,835.28	1,364.00	9,467.84	17,667.12
Given this Quarter	0.00	0.00	0.00	0.00
Total	6,835.28	1,364.00	9,467.84	17,667.12

In relation to givers who are 13 or more weeks behind schedule

Have these people been assigned a visit?

This report can be exported in the available file export formats and printed. The Quarterly Report provides Corps, Division and Territorial leadership, the opportunity to sign and date the report, before following their own internal operating procedures.

For formatting purposes this report should be exported in Excel. This is because the report (unscaled) is too big to fit in a single page width and will result in it being printed over 4 pages.

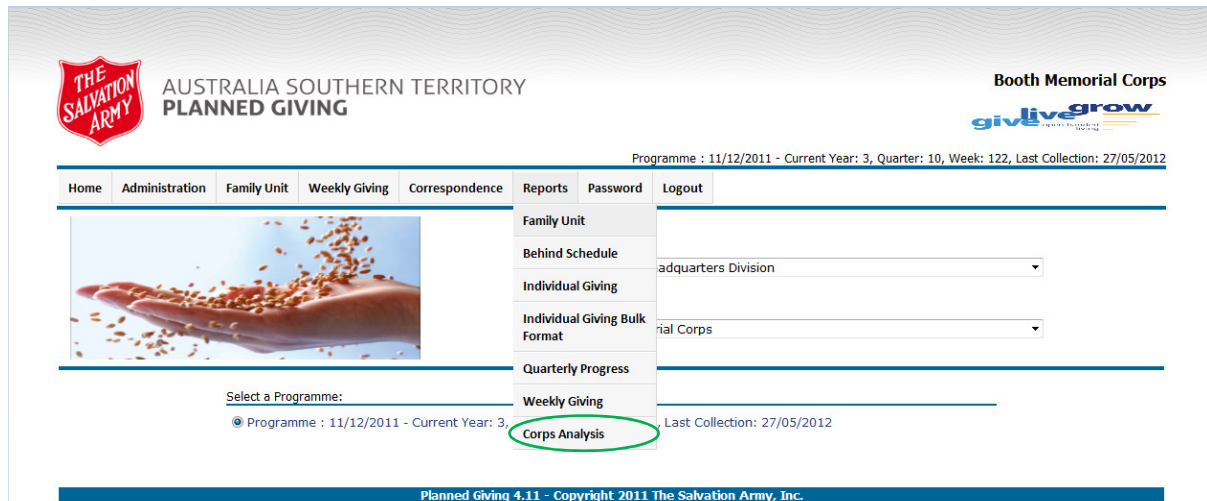
After exporting in Excel, go to Page Setup, and select, "1 page wide" for the "fit the printing" option.

The report will now print out as two pages or a single double-sided sheet.

CORPS ANALYSIS REPORT

The Corps Analysis Report provides a monthly summary of the Corps' participation and Giving information, as well as graphs that show the monthly amounts over the life of the current Program. It is critical that you understand that data in the report is delayed by two months, so as to allow for any delays that annual leave and direct banking information may cause to impact upon the accuracy of the data. The delay of the data in the report, means that if you were to look at this report on the 1st of June (*and any other day in the month of June*) then the data displayed in this report will be for the month of April.

To access this report, click on the Report, Corps Analysis menu:



THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY **PLANNED GIVING** Booth Memorial Corps **givegrow**

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 122, Last Collection: 27/05/2012

Home Administration Family Unit Weekly Giving Correspondence Reports Password Logout

Family Unit
Behind Schedule adquarters Division
Individual Giving
Individual Giving Bulk Format ial Corps
Quarterly Progress
Weekly Giving
Corps Analysis

Select a Programme:
● Programme : 11/12/2011 - Current Year: 3, Last Collection: 27/05/2012

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.

The following report will appear:



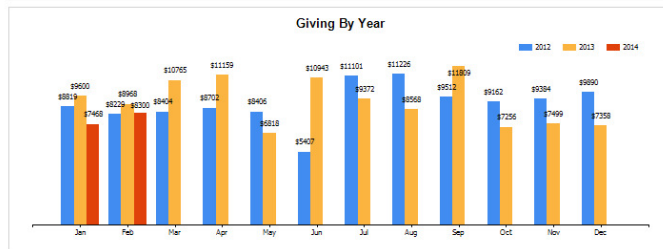
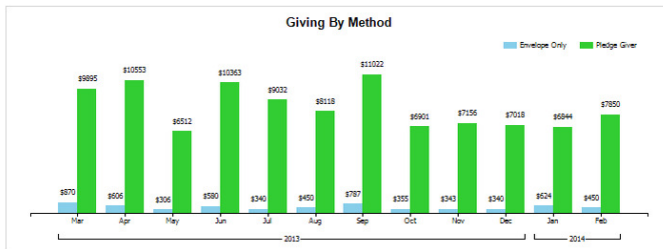
Corps Monthly Report



Booth Memorial Corps Monthly Analysis

February 2014

Number of Pledges: 59	Pledged: \$8,925.28	Giving: \$7,850.00
Number of Envelopes Only: 12	Anticipated: \$196.00	Giving: \$450.00



This report can be exported in the available file export formats and printed.