Weekly Envelopes – Prepare Vendor List - Review Weekly Envelope Contribution List

Your goal is to have each report contain the same data as your vendor list. The *Contribution Summary by Donor report* will help you decide which non contributors to remove. Each location usually chooses who to remove non-contributors who haven't contributed during "X" number of years. (x is the number of years your location chooses.)

Print (or download .csv) and compare the following lists:

- **Vendor List (spreadsheet order from envelope vendor)**

- **Quick Reports** – click Envelope # column to sort in number order before creating the report

  Family Directory > Quick Reports > (Select Report Name)

  - **Filtered Envelope Numbers** (everyone with Send Contrib. Env.: ☑ Checked – Should match your Vendor list) May included names with NO envelope numbers. Envelope numbers can be removed from non-users and reassigned. This will not affect data in CLOSED batches. Some locations choose to NOT reassign old envelope numbers and <u>uncheck</u> the Send Contrib. Env. box so they will not appear on this report.

  - **Full Envelope Numbers** (envelope number is not null <u>AND</u> Send Contrib. Env.: ☑ Checked , shows everyone with an envelope number, even non-contributors) Note: Records will not appear on this report if either the record has no envelope number OR the Send Contrib. Env. box is not checked.

  - **Advanced Filter and csv** ▼ 🖻 (all donors with an envelope number BUT does not receive Contribution envelopes – "Send Contrib Env. is NOT Checked") Send Contrib. Env. ☐
    Family Directory, ▼ Filter, Advanced Options, Send Envelopes: No Envelopes, Apply, (This will populate all people with your Church who DOES NOT have "Send Contrib. Env. Checked")
    click the csv icon 🖻 save the file to your computer. Open the downloaded file, press ctrl+T to create a table, go to the Envelope # column and sort "Largest to smallest", scroll down until you see the 1st record with no envelope #, click on the record in the 1st column, hold down ctrl+shift+end to highlight all records with no envelope number, release (columns are selected). Select Home, Delete, Delete Sheet Rows. You can use this data in the spreadsheet or merge it into a word document.

- **Contribution Summary by Donor** (optional)
  Offering > Analysis > Contribution Summary by Donor
  Select: Weekly Envelopes, next
  Select: All Family Groups, next
  Select: Start and End Date, run report (choose excel or pdf), you can run a report with a cluster of years or one report per year.
  Sort By: Name
  Name Format: **Informal Mailing Name** (see note below)
  (do not make changes to any field choices that's not listed above)

Online Contributions – some locations choose unique envelope numbers for online contributions. For example, the envelope number can begin with 9###. It should be unique enough to recognize the difference between regular weekly envelopes.

Once your list is up-to-date, you can either export the updated list from ParishSOFT to your Vendors wobpage or update the list on your Vendor's webpage.

NOTE: When sending data, **NEVER** use the **"First Names"** field to print on items for distribution. Use *Mailing Name* or *Informal Mailing Name (or any other salutation)*.
The "First Names" is only used when searching for data. This field may include deceased member names.