

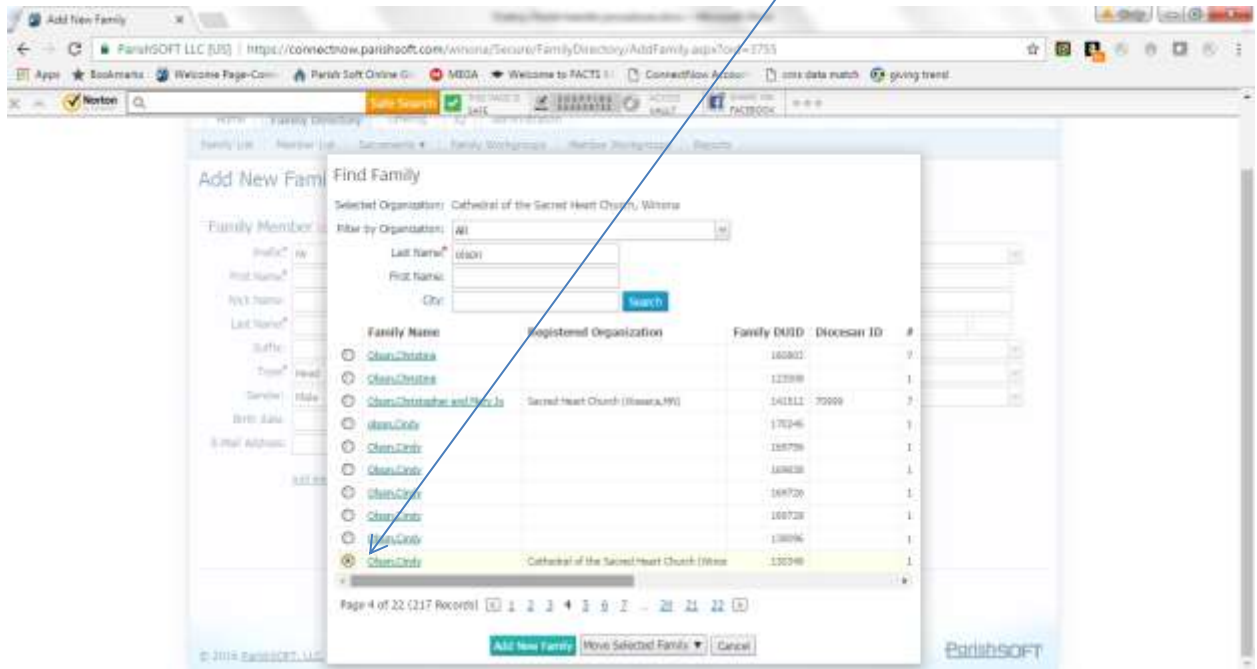
Merging Parish procedures

Family Suite:

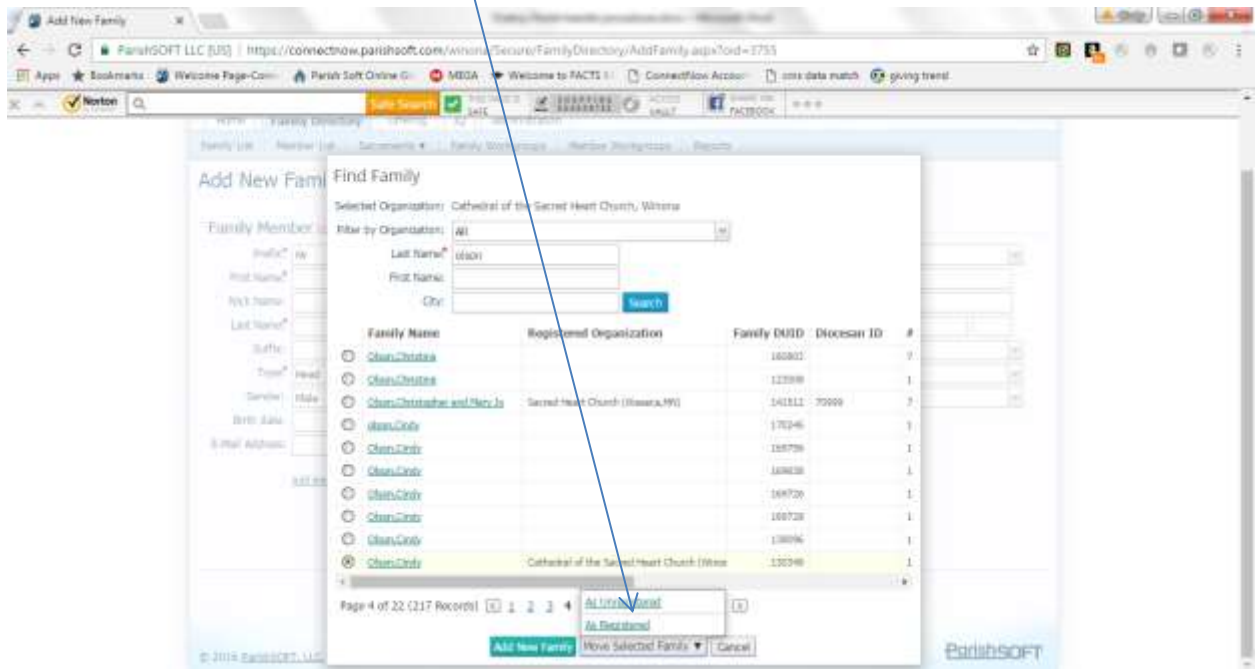
1. Update all contribution records in Connect Now (if you have been using that to track them) up to the date of the change of status for the parish.
2. Print off the contribution statements
 - a. Print them to a PDF file so that you will be able to save that on a computer and have access to it
3. Move all members to another parish in the cluster
 - a. You may want to change the status of all the members of the parish to be merged to Inactive
 - b. Go to the receiving parish and click on "Add New Family". This box will appear:

The screenshot shows a web browser window displaying the 'Add New Family' form in the ConnectNow Family Suite. The browser's address bar shows the URL: <https://connectnow.parishsoft.com/winona/Secure/FamilyDirectory/AddFamily.aspx?oid=1753>. The page title is 'Add New Family to Cathedral of the Sacred Heart Church, Winona'. A modal window titled 'Find Family' is open, allowing the user to search for existing families. The modal includes a dropdown for 'Selected Organization' set to 'Cathedral of the Sacred Heart Church, Winona', a 'Filter by Organization' dropdown set to 'All', and input fields for 'Last name', 'First name', and 'City'. A 'Search' button is located at the bottom right of the modal, and a 'Cancel' button is at the bottom center. The background form has sections for 'Family Member' (with fields for Profile, First Name, Nick Name, Last Name, Suffix, Title, Gender, Birth Date, Email Address, and Add Profile Picture) and 'Family Information' (with fields for Formal Family Name, Informal Name, Formal Salutation, Informal Salutation, and Email Address). At the bottom of the page, there are buttons for 'Save & New', 'Save & Edit', 'Save & Print', and 'Cancel'.

c. Search for each Member and select the correct one to transfer



d. Move as Registered to the new parish



e. Once this process is completed, let Cindy Olson know that you no longer need your Parishsoft Connect Now Family Suite license for the parish that has now been merged to another parish. She will contact ParishSoft to end the license and at that point in time, any remaining period of the license fee will be refunded to you by ParishSoft.

XXX Church
 Trial Balance Report

Jul-16

Beginning Balance

Assets

1110CS21P00 Church Checking	7,500.00
1110CS22P00 CCW Checking	900
1115CS21P00 Church Regular Savings	4,000.00
1115CS22P00 Church Special Savings	12,000.00
1115CS23P00 CCW Savings	0
1205AR00P00 General Accounts Receivable	0
1215AR00P00 Interest/Dividends Receivable	0
1305PP00P00 Prepaid Expense	0
1830FA00P01 Capital Improvements	12,000.00
Total Assets:	36,400.00

Liabilities

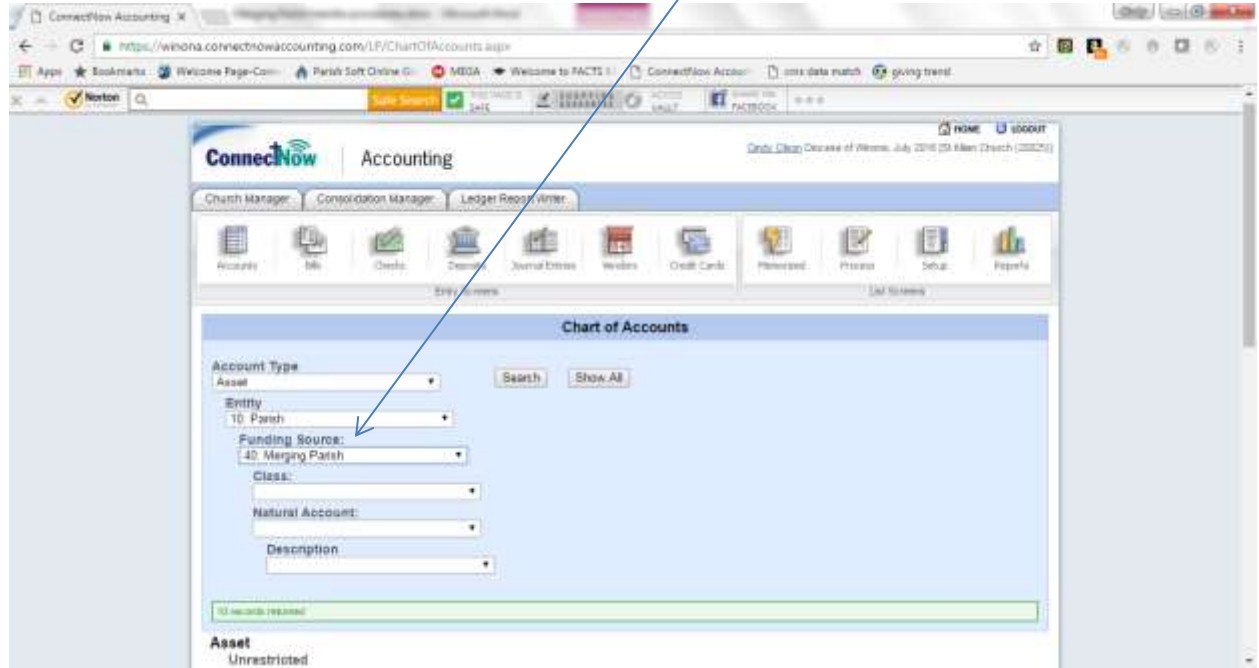
2105AP00P00 Accounts Payable - Vendors	0
2201AP00P00 Latin America	25
2202AP00P00 Catholic Communications	0
2203AP00P00 Aid Church in Eastern and Central E	5
2204AP00P00 Rice Bowl	278
2205AP00P00 Catholic Relief Services	165
2206AP00P00 Holy Land	10
2207AP00P00 Catholic Charities-Diocese of Winon	0
2208AP00P00 Peter's Pence	10
2209AP00P00 Home Missions	25
2210AP00P00 Black/Native American	0
2211AP00P00 Propagation of Faith	10
2212AP00P00 Campaign for Human Development	0
2213AP00P00 Retirement Fund For Religious	110
2214AP00P00 Catholic University	0
2215AP00P00 Archdiocese for the Military Servic	0
2217AP00P00 Missionary Cooperative Plan	0
2218AP00P00 Natural Disaster Assistance	0
2219AP00P00 Other	199
Total Liabilities:	837

Net Assets

3100NA00P00 Unrestricted Funds	20,141.04
3150NA00P01 Plant Fund	12,000.00
3200NA21P11 Designated-CCW	900
3300NA21P51 Seeds of Faith	0
3300NA21P52 Rooted in Faith Campaign 2013	2,521.96
Total Net Assets:	35,563.00

In the chart account of the parish taking over the accounting functions, set up accounts to receive the balances from the merging parish.

Funding source 40 is set up for Merging Parish accounts



Add Accounts as needed by category

Please note: there are no liability accounts; bills will run through the receiving parish accounts payable.

Create one Fixed asset sub account and one Net Asset Fixed assets sub account on the receiving parish's chart for the merging parish total fixed assets (under funding source 1-Plant Fund).

Create a Journal entry on the receiving parish's books for the balances from the merging parish (see example on next page)

**XXX Church (merging parish)
Trial Balance Report**

XXX Church (Receiving Parish)

**Beginning Journal Entry for Receiving
Balance Parish**

Account Shortcut and Description

Assets			Debit	Credit
1110CS21P00 Church Checking	7,500.00	1115CS21P40 XXX Checking	7500	
1110CS22P00 CCW Checking	900	1115CS22P40 XXX CCW Checking	900	
1115CS21P00 Church Regular Savings	4,000.00	1115CS23P40 XXX Regular Savings	4000	
1115CS22P00 Church Special Savings	12,000.00	1115CS24P40 XXX Church Special Savings	12000	
1115CS23P00 CCW Savings	0			
1205AR00P00 General Accounts Receivable	0			
1305PP00P00 Prepaid Expense	0			
1830FA00P01 Capital Improvements	12,000.00	1830FA21 XXX Fixed Assets	12000	
Total Assets:	36,400.00			
Liabilities				
2105AP00P00 Accounts Payable - Vendors	837	2105AP00P00 Accounts Payable		837
Net Assets				
3100NA00P00 Unrestricted Funds	20,141.04	3200NA21P40 XXX Unrestricted Funds		20141.04
3150NA00P01 Plant Fund	12,000.00	3150NA21P01 XXX Plant Fund		12000
3200NA21P11 Designated-CCW	900	3200NA22P40 xxx Designated CCW		900
3300NA21P51 Seeds of Faith	0	3200NA23P40 XXX Rooted in Faith		2521.96
3300NA21P52 Rooted in Faith Campaign 2013	2,521.96			
Total Net Assets:	35,563.00		36400	36400

Notify Cindy Olson when this process is complete to end your ParishSoft Connect Now Accounting license.