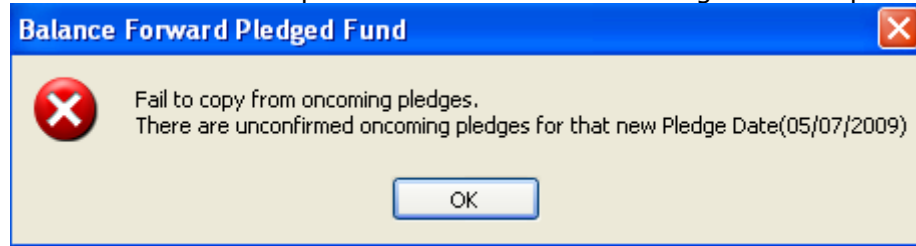


PACS BALANCE FORWARD

Problem:

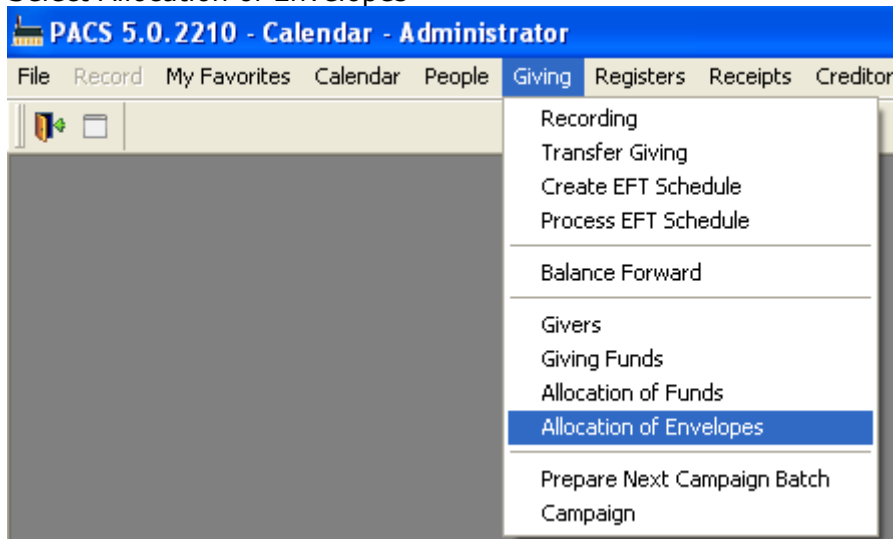
The Balance Forward process will not run. A message comes up:



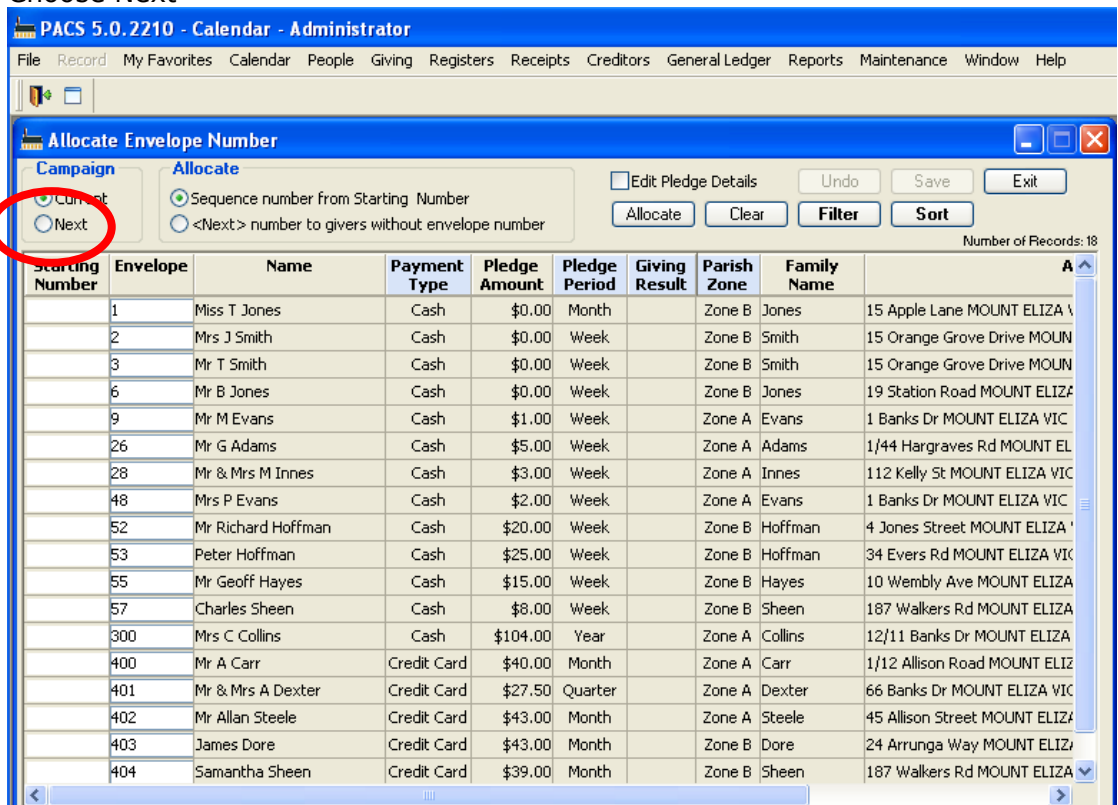
Investigation:

Check the oncoming pledges:

1. Go to Giving menu
2. Select Allocation of Envelopes



3. Choose Next



4. Check the oncoming pledges

PACS 5.0.2210 - Calendar - Administrator

File Record My Favorites Calendar People Giving Registers Receipts Creditors General Ledger Reports Maintenance Window Help

Allocate Envelope Number

Campaign: Allocate

Current
 Next

Sequence number from Starting Number
 <Next> number to givers without envelope number

Edit Pledge Details Undo Save Exit

Allocate Clear Filter Sort

Number of Records: 1

Starting Number	Envelope	Name	Start Date	Payment Type	Pledge Amount	Pledge Period	Confirmed	Giving Result	Parish Zone	Family Name
	9	Mr M Evans	05/07/2009	Cash	\$20.00	Week	<input type="checkbox"/>		Zone A	Evans

5. Further investigation is required if the pledges are unexpected or wrong.

Solution:

The solution depends on the evaluation of the oncoming pledges. If all the oncoming pledge details are correct, and expected, the issue can be resolved on the Allocate Envelope Number form. See the instructions to *Confirm oncoming pledges on the Allocate Envelope Form* below. If there is any doubt about the oncoming pledges further investigation is required. See *Further Investigation* below.

Confirm oncoming pledges on the Allocate Envelope Form:

1. Tick the Edit Pledge Details checkbox

PACS 5.0.2210 - Calendar - Administrator

File Record My Favorites Calendar People Giving Registers Receipts Creditors General Ledger Reports Maintenance Window Help

Allocate Envelope Number

Campaign: Allocate

Current
 Next

Sequence number from Starting Number
 <Next> number to givers without envelope number

Edit Pledge Details Undo Save Exit

Allocate Clear Filter Sort

Number of Records: 1

Starting Number	Envelope	Name	Start Date	Payment Type	Pledge Amount	Pledge Period	Confirmed	Giving Result	Parish Zone	Family Name
	9	Mr M Evans	05/07/2009	Cash	\$20.00	Week	<input checked="" type="checkbox"/>		Zone A	Evans

2. Tick the checkbox in the Confirmed column for each correct oncoming pledge

PACS 5.0.2210 - Calendar - Administrator

File Record My Favorites Calendar People Giving Registers Receipts Creditors General Ledger Reports Maintenance Window Help

Allocate Envelope Number

Campaign: Allocate

Current
 Next

Sequence number from Starting Number
 <Next> number to givers without envelope number

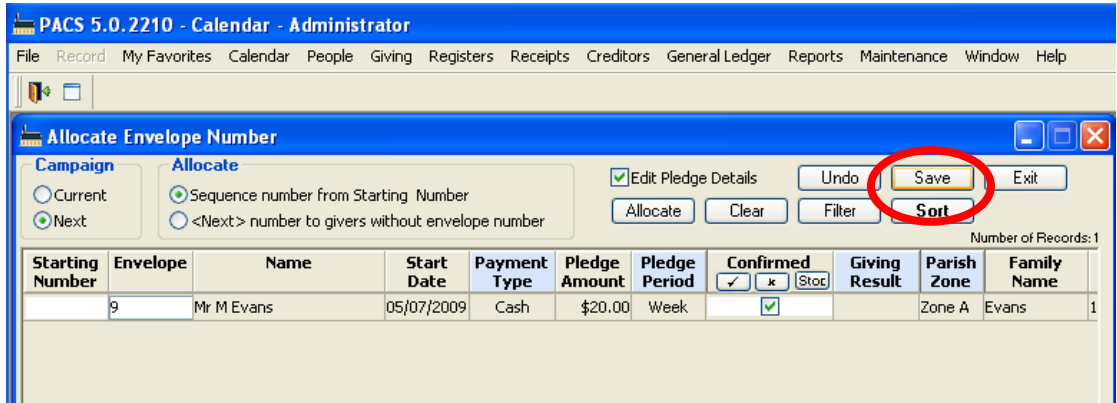
Edit Pledge Details Undo Save Exit

Allocate Clear Filter Sort

Number of Records: 1

Starting Number	Envelope	Name	Start Date	Payment Type	Pledge Amount	Pledge Period	Confirmed	Giving Result	Parish Zone	Family Name
	9	Mr M Evans	05/07/2009	Cash	\$20.00	Week	<input checked="" type="checkbox"/>		Zone A	Evans

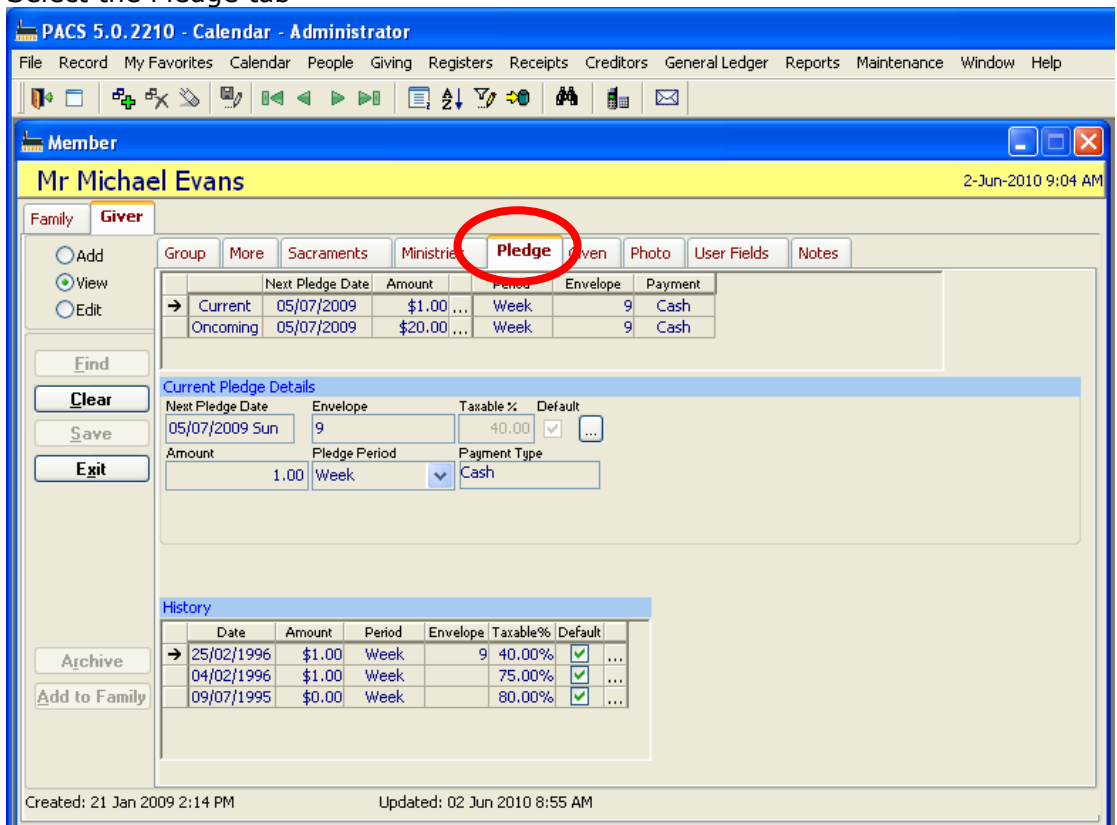
3. Click Save



Further Investigation:

If there is some doubt about the oncoming pledges:

1. Go to People menu
2. Select Members
3. Find the person with the doubtful oncoming pledge
4. Select the Pledge tab



5. Considering all the pledge details, both current and oncoming and the pledge history, decide if the oncoming pledge should be confirmed or deleted. See *Confirm oncoming pledge on the Pledge tab* below and *Delete an oncoming pledge* below.

Confirm oncoming pledge on the Pledge tab:

1. Select Edit

The screenshot shows the 'Member' window for Mr Michael Evans. The 'Pledge' tab is active. On the left sidebar, the 'Edit' button is circled in red. The main area displays a table of pledges with the 'Oncoming' pledge selected. Below the table, the 'Oncoming Pledge Details' form is visible, showing fields for Start Date, Envelope, Taxable %, Amount, Pledge Period, and Payment Type. The 'Confirmed' checkbox is currently unchecked.

	Next Pledge Date	Amount	Period	Envelope	Payment
Current	05/07/2009	\$1.00 ...	Week	9	Cash
→ Oncoming	05/07/2009	\$20.00 ...	Week	9	Cash

Oncoming Pledge Details

Start Date: 05/07/2009 Sun
Envelope: 9
Taxable %: 40.00 [checked] ...

Amount: 20.00
Pledge Period: Week
Payment Type: Cash

Confirmed

School Reference: [dropdown]
Mass Centre: [dropdown]

Raffle Booklet

History

Date	Amount	Period	Envelope	Taxable%	Default
→ 25/02/1996	\$1.00	Week	9	40.00%	[checked] ...
04/02/1996	\$1.00	Week		75.00%	[checked] ...
09/07/1995	\$0.00	Week		80.00%	[checked] ...

Created: 21 Jan 2009 2:14 PM Updated: 02 Jun 2010 8:55 AM

2. Tick the Confirmed checkbox

The screenshot shows the same 'Member' window for Mr Michael Evans. The 'Confirmed' checkbox in the 'Oncoming Pledge Details' section is now circled in red. The 'Edit' button in the sidebar is no longer circled.

	Next Pledge Date	Amount	Period	Envelope	Payment
Current	05/07/2009	\$1.00 ...	Week	9	Cash
→ Oncoming	05/07/2009	\$20.00 ...	Week	9	Cash

Oncoming Pledge Details

Start Date: 05/07/2009 Sun
Envelope: 9
Taxable %: 40.00 [checked] ...

Amount: 20.00
Pledge Period: Week
Payment Type: Cash

Confirmed

School Reference: [dropdown]
Mass Centre: [dropdown]

Raffle Booklet

History

Date	Amount	Period	Envelope	Taxable%	Default
→ 25/02/1996	\$1.00	Week	9	40.00%	[checked] ...
04/02/1996	\$1.00	Week		75.00%	[checked] ...
09/07/1995	\$0.00	Week		80.00%	[checked] ...

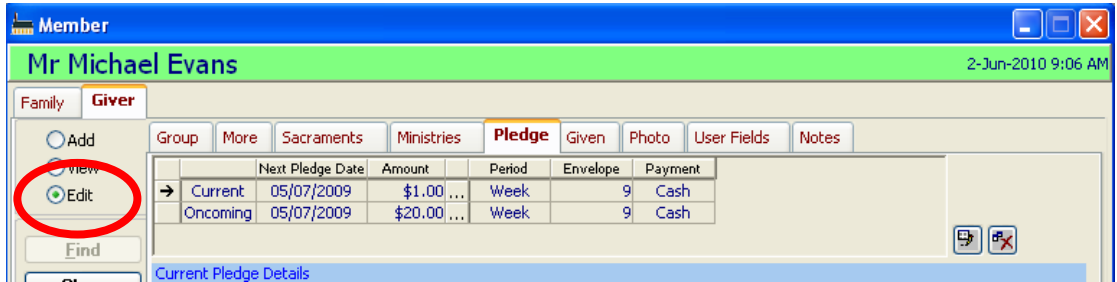
Created: 21 Jan 2009 2:14 PM Updated: 02 Jun 2010 8:55 AM

3. Click Save

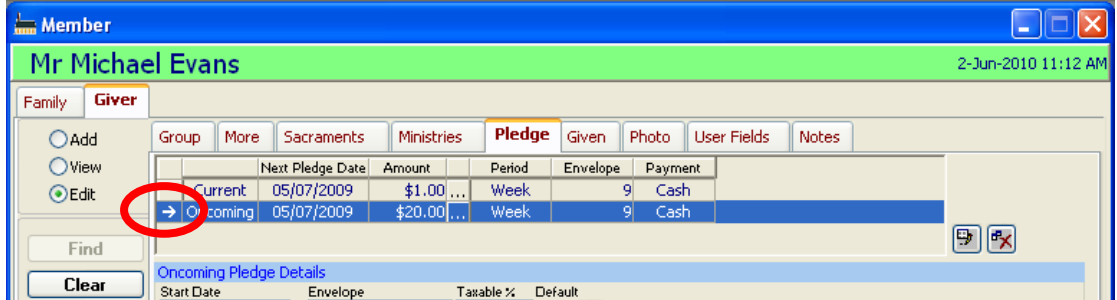
Delete an oncoming pledge:

If an oncoming pledge is not required

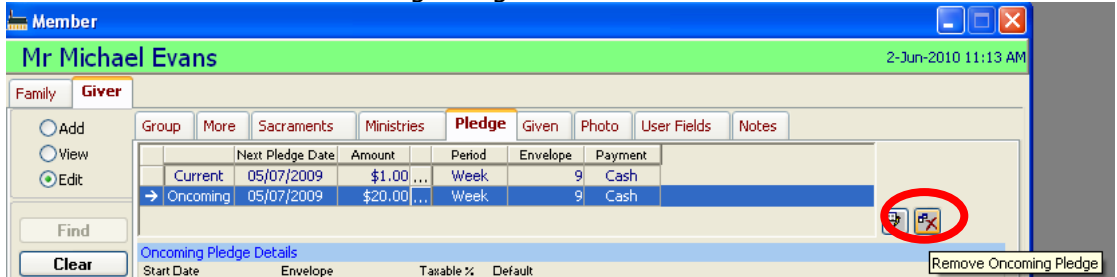
1. Select Edit



2. Click on the square to the left of the oncoming pledge to be deleted



3. Click on the Remove Oncoming Pledge button



4. Click Yes to confirm the removal of the oncoming pledge

