



Preparing Lost Pledger's Report

Running List of Lost Pledgers Report

Step 1

Go To Contributions
From the Reports Menu
Choose Financial Analysis
Reports
Then 'List of Lost Pledgers'

The screenshot shows the 'Parish Data System - Church Office' application. The top navigation bar includes 'File', 'Information', 'Personnel', 'Sacramental Registers', 'Reports', 'Processes', and 'Administration'. Below this is a secondary menu with 'Dashboard', 'Families', 'Members', and 'Contributions'. The 'Contributions' menu item is highlighted in orange. A red arrow points from the 'Contributions' menu item to the 'Select Report' dialog box. The 'Select Report' dialog has radio buttons for 'Fund Reports' (selected) and 'All Reports'. Below these are buttons for 'Find', 'Open All', and 'Close All'. A tree view shows 'Financial Reports' expanded, with sub-items like 'Listing Reports', 'Financial Statements', 'Pledge Cards', etc. The 'Financial Analysis Reports' section is expanded, showing a list of reports. The report 'List of Lost Pledgers / New Pledgers' is highlighted in blue. A red arrow points from the text 'Choose Financial Analysis Reports' to this item. Another red arrow points from the text 'Then 'List of Lost Pledgers'' to the same item. At the bottom of the dialog are buttons for 'Add', 'Delete', 'Copy', and 'Reorder User Reports'. The status bar at the bottom shows 'Filename: PDS2067'.

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Rates/History/Keywds ✓
Recap/Totals
Billing Address
View / Print
Fund Filter
Fund History Entries
Listing Screen
Reports
Quick Posting
Processes
Exit Program

Select Report:

Fund Reports
 All Reports

Find Open All Close All

- Financial Reports
 - Listing Reports
 - Financial Statements
 - Pledge Cards
 - Label/Envelope Reports in Upper Case
 - Label/Envelope Reports in Mixed Case
 - Tax Reports
- Financial Analysis Reports
 - Financial Comparisons by Week & Year
 - Breakdown of Funds by Amount Range
 - Monthly, Quarterly, Yearly Comparison
 - Frequency of Contributions/Payments
 - Weekly Breakdown by Amount Categories
 - Collection Rate Report
 - Summary of Grand Totals by Fund
 - Summary of Delinquency by Fund
 - Pledge Group Statistics by Amounts
 - Summary of Increases & Decreases by Year
 - Increases & Decreases by Group
 - List of Lost Pledgers / New Pledgers**
 - List of Lost Givers / New Givers
 - Goal Statistics
 - Top Givers Report
 - Ledger Confirmation Report
- Data Export/Env Co. With Fund Selections
- Barcode Reports
- 2018 Reports

Add Delete Copy Reorder User Reports

Filename: PDS2067

Step 2

Date Range as Shown

Fund 1

Click on Next

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions
Select a Different Report

Overview
Select Printer
Listing Layout
Select Funds
Additional Layout
Select Families

Preview Report
Print the Report
Cancel the Report
Exit Program

Select Funds to Print:

Date Range to Print: 01/01/2021 Thru: 12/31/2021

Funds to Print: 1 Add a Fund to this List

Print Overpayments As: Zero (\$0.00) for the Balance Due

Fund	Title	Specify How to Print the Group
1	Church Donations	
	Church Donation	Include Group in the Report

Preview Report Print Report Back to Overview < Back Next > Cancel

Step 3

Print Lost Pledgers (check box)

Add in Keyword (check box)
(if you wish to mark your lost pledgers in PDS for sending a letter)

Create Keyword (type in this area)
(this keyword marks all those in PDS who turned in a card last year but not this)

Previous Period Beginning & Ending
(1/1/20-12/31/20)

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions
Select a Different Report

Overview
Select Printer
Listing Layout
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Additional Layout
Select Families

Preview Report
Print the Report
Cancel the Report
Exit Program

Print Options:

- Print Lost Pledgers
- Print New Pledgers

Modification Option:

- Add Family Keyword to Lost Pledgers
- Add Family Keyword to New Pledgers

Add This Family Keyword:

Add This Family Keyword:

Previous Period Beginning and Ending Dates

Beginning Date:

Ending Date:

High Values: (press Ctrl+Enter to add new lines)

25.00
50.00
75.00
100.00
150.00
200.00
300.00
400.00
500.00
750.00
1,000.00

Preview Report Print Report Back to Overview < Back Next > Cancel

Step 4

Include Active Families

Preview Report

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions
Select a Different Report

Overview
Select Printer
Listing Layout
Select Funds
Additional Layout
Select Families
Preview Report
Print the Report
Cancel the Report
Exit Program

Select Families:

List of Selections: Find

- Simple Selection - Never Saved
- New Selection

Show Only My Selections

Save Add Delete

Clear Copy Reorder

Export Sel. to a File

Import Sel. from a File

Selection Information Family Selections Delinquency Selections Additional Selections

Selection Information

Name: Simple Selection - Never Saved

Description:

Sortation

Sort Order: Name

Skip Families That Do not Have Any Selected Funds

Include Family Marked as Loose Collections

Active / Inactive Restrictions

Include Active Families

Include Inactive Families

Preview Report Print Report Back to Overview < Back Preview Cancel

Top of the report dates should look like those in red circle.

This shows you your current List of Lost Pledgers. Keyword (if you selected) will be added to Family Screen.

PTECHS.COM, LLC												
List of Lost Pledgers / New Pledgers for Fund: 1 (01/01/2020 - 12/31/2021)												
Total Number of Families:		13		Previous Period:		01/01/2020		-		12/31/2020		
Families in Previous Period:		5		Current Period:		01/01/2021		-		12/31/2021		
Families in Current Period:		2										
Amounts Pledged												
Category	Previous Pledges	Current Pledges	New Pledges	Lost Pledges	Pledges Increased	Pledges Decreased	Remained the Same	Prev. Amt. Pledged	Curr. Amt. Pledged	Total Gain/Loss		
\$0.00 - \$25.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$25.01 - \$50.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$50.01 - \$75.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$75.01 - \$100.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$100.01 - \$150.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$150.01 - \$200.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$200.01 - \$300.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$300.01 - \$400.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$400.01 - \$500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$500.01 - \$750.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$750.01 - \$1,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$1,000.01 - \$1,500.00	2	0	0	1	1	0	0	2,400.00	0.00	-2,400.00		
\$1,500.01 - \$2,000.00	0	2	0	0	0	0	0	0.00	3,360.00	3,360.00		
\$2,000.01 - \$2,500.00	1	0	0	1	0	0	0	2,400.00	0.00	-2,400.00		
\$2,500.01 - \$3,000.00	1	0	0	0	0	1	0	2,600.00	0.00	-2,600.00		
\$3,000.01 - \$3,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$3,500.01 - \$4,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$4,000.01 - \$4,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$4,500.01 - \$5,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$5,000.01 - \$7,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$7,500.01 - \$10,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$10,000.01 - \$15,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$15,000.01 - \$10,000,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
Total	4	2	0	2	1	1	0	\$7,400.00	\$3,360.00	(\$4,040.00)		
Lost Pledgers												
Previous Pledge	ID/Env	Family Name										
\$1,200.00	003	Blessed Sacrament										
\$2,400.00	004	Christ the King										