

PDS Church Office Advanced Training

By

Trinity Publications – Software & Support Department

Led by David Cotton

- I. PDS Church Office**
 - a. Reports**
 - i. Family - Member - Contribution relationship**
 - ii. Report screens**
 - 1. Overview screen**
 - 2. Printer Screen**
 - 3. Layout Screen – Listing & Letter**
 - 4. Selection Screen**
 - a. Sortation**
 - b. Specific Families**
 - c. Additional Selections – access to the entire database**
 - d. Boolean Logic Enhanced**
 - e. Saving Criteria including Owner Name and Access Rights**
 - iii. Family Reports**
 - 1. Report Examples**
 - 2. Quick Listings**
 - 3. Texting Permission Letter**
 - 4. Labels**
 - 5. Envelope Company**
 - 6. Quick Communication Routine – Texting, Email, & Phone in one report**
 - 7. Adding Reports**
 - a. Report Owner and Access**
 - b. Letters**
 - c. Exporting to a CSV file**
 - iv. Member Reports**
 - 1. Report Examples**
 - 2. Quick Listings**
 - 3. Date Listings**
 - 4. Special Date Listings**
 - 5. Statistical Information**
 - 6. Texting Permission Form Letter**
 - 7. Grade Reports**
 - 8. Involvement Reports**

9. Export Reports

- a. Picture Directory
- b. Constant Contact
- c. Quick Communication

10. Sacrament Notification Letters

v. Contribution Reports

- 1. Fund Activity Report
- 2. Reprinting a Batch
- 3. One Line Family List with Fund Total
- 4. Pledge Drive Status Report
- 5. Charges & Payments with Return Coupon
- 6. Itemized End-of-Year Statement
- 7. Tax Reports
 - a. End-of-Year Donor Substantiation
 - b. List of Donors with contributions needing itemizing for the IRS
- 8. Financial Analysis Reports
 - a. Monthly, Quarterly, Yearly Comparison
 - b. Summary of Grand Totals by Fund
 - c. Top Givers Report

vi. Advanced Selection Criteria logic

vii. Copying & Modifying existing reports.

b. File Pulldown Menu

- i. Email & Text Setup
- ii. System Processes – including finding and correcting duplicate families
- iii. Bulk Mail Process
- iv. Backups
- v. Fixing Data Discrepancies

II. Enhancement Suggestions – “Get Satisfaction”

III. Support – Where to go with questions and problems. 877-455-9300.