

## New Vanco Import Screens:

1. Choose [Vanco Direct Upload]

Celeste Durand (Organization Administrator) of The Diocese of Pensacola-Tallahassee (Pensacola).  
Current Family / Member: None selected  
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eGiving Menu for Vanco File Transfer	
<a href="#">Electronic Contribution Report</a>	<a href="#">Vanco Direct Upload</a>
<a href="#">eGiving Queue</a>	<a href="#">Vanco Login</a>

2. Click [Upload Vanco File].

Celeste Durand (Organization Administrator) of The Diocese of Pensacola-Tallahassee (Pensacola).  
Current Family / Member: None selected  
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eGiving Menu for Vanco DIRECT File Upload
Use EXTREME Caution when uploading and processing these files. Data goes directly into the contributions table with no processing record!
<a href="#">Upload Vanco File</a>
<a href="#">Vanco File Management</a>
<a href="#">Vanco Login</a>

3. Browse to the file, click [Upload file] – just like always.

4. Celeste Durand (Organization Administrator) of The Diocese of Pensacola-Tallahassee (Pensacola).  
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6. **Upload Vanco File**

File Name: <input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Upload File"/>	<input type="button" value="Cancel"/>
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- Go back to eGiving, Vanco Direct Upload, click [Vanco File Management]

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**Direct File Upload Directions**

- Upload the Vanco File Using the link on the previous menu
  - Transfer the file to the database
    - Process the file

**File Display Options**

Upload Date:	Start Date: <input type="text" value="8/23/2013"/>	End Date: <input type="text" value="8/30/2013"/>
View Only:	<input checked="" type="radio"/> New Files ? <input type="radio"/> Transferred Files ? <input type="radio"/> Processed Files ? <input type="radio"/> All Files	
Date Processed:	Start Date: <input type="text"/>	End Date: <input type="text"/>

Uploaded Files					
	Original File Name	File Type	File Size	Uploaded By	Date Uploaded
<span style="color: red; font-weight: bold;">delete</span> <span style="color: green; font-weight: bold;">transfer</span>	2013_0828_dp.csv	application/vnd.ms-excel	1346	Celeste Durand	8/30/2013 9:51:54 AM
	Stored as: 2013_0828_dp_Author_929524_20130830_h9_m51_s54_l326.csv			Date Transferred:	

- NEW files have just been uploaded; nothing has been done and you can delete them, if necessary.
- Click [transfer] to “process” the file you just uploaded. This button does immediately what we used to wait for overnight.
- You will get the message “There are not NEW files waiting to be Transferred” when that’s completed.

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**Direct File Upload Directions**

- Upload the Vanco File Using the link on the previous menu
  - Transfer the file to the database
    - Process the file

**File Display Options**

Upload Date:	Start Date: <input type="text" value="8/23/2013"/>	End Date: <input type="text" value="8/30/2013"/>
View Only:	<input type="radio"/> New Files ? <input checked="" type="radio"/> Transferred Files ? <input type="radio"/> Processed Files ? <input type="radio"/> All Files	
Date Processed:	Start Date: <input type="text"/>	End Date: <input type="text"/>

There are no NEW files waiting to be Transferred.

Use the 'Transferred Files' radio button to see files waiting for processing or 'All' to see all files.

8. Choose "Transferred Files" and click [Display Files]. Click the [process] button to move each donation from the file you uploaded into the "regular" eGiving Queue. If you are working with only ONE FILE, you will immediately come to the "apply payment" screen. If you have uploaded several, you will get to choose which to process THEN come to the "apply" screen.
9. You will see TWO LINES for each contribution. The TOP LINE is what came from Vanco and is "Pending." The SECOND LINE is what ChurchDB has in the system. If the Family ID matches the correct existing family AND the monies are going to the intended Fund and Account, click [Accept Match].

rchDB



Celeste Durand (Organization Administrator) of The Diocese of Pensacola-Tallahassee (Pensacola).

Current Family / Member: None selected

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Original File Information						
Family ID	Customer Name	Address	Phone/Email	Fund Name/ Site Affiliation	Contribution	Status
Page 1 of 1		Number per Page: <input type="text" value="25"/>		<a href="#">Change Count</a>		1 - 2 of 2 records
				Go to Page: <input type="text" value="1"/>	<a href="#">Go</a>	<input type="text" value="1"/>
				7258-596:Holy Name of Jesus 2013	CC \$80.00 8/27/2013	Pending
				<input type="text" value="CSA : 2013"/> Affiliation: Holy Name of Jesus Parish Niceville [P]	<a href="#">? Accept Match</a> OR Enter New Family ID to lookup: <input type="text"/> <a href="#">Lookup</a> OR <a href="#">Retire Without Processing</a>	
				7641:Pre-Cana	CC \$100.00 8/27/2013	Pending
Family ID Not Found				Enter New Family ID to lookup: <input type="text"/> <a href="#">Lookup</a> OR <a href="#">Retire Without Processing</a>		
Page 1 of 1		Go to Page: <input type="text" value="1"/>		1 - 2 of 2 records		

10. If the Family ID is NOT in ChurchDB, you will have to SKIP THIS until you can enter a Family ID. I recommend opening Firefox, logging into ChurchDB there and looking up families. **There will no longer be a "find a family while entering money" option!** After typing in the correct Family ID, click [lookup] then [Affiliate and Accept] on the next screen. (If you have to do this, I suggest you correct that Family ID in Vanco so you won't have to do this for every contribution they make.)

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Current Family / Member: None selected

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Original File Information						
Family ID	Customer Name	Address	Phone/Email	Fund Name/ Site Affiliation	Contribution	Status
Page 1 of 1		Number per Page: <input type="text" value="25"/> <a href="#">Change Count</a>		1 - 1 of 1 records		
		Go to Page: <input type="text" value="1"/> <a href="#">Go</a> 1				
13112727				7188:To Trust Again	CC \$100.00 8/29/2013	Pending
Family ID Not Found				Enter New Family ID to lookup: <input type="text"/> <a href="#">X</a> <a href="#">Lookup</a> OR <a href="#">Retire Without Processing</a>		
Page 1 of 1		Go to Page: 1		1 - 1 of 1 records		

Celeste Durand (Organization Administrator) of The Diocese of Pensacola-Tallahassee (Pensacola).

Current Family / Member: None selected

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Original File Information						
Family ID	Customer Name	Address	Phone/Email	Fund Name/ Site Affiliation	Contribution	Status
Page 1 of 1		Number per Page: <input type="text" value="25"/> <a href="#">Change Count</a>		1 - 1 of 1 records		
		Go to Page: <input type="text" value="1"/> <a href="#">Go</a> 1				
				7188:To Trust Again	CC \$100.00 8/29/2013	Pending
				Ministries : To Trust A <input type="text"/> <input type="button" value="v"/> Affiliation:	? <a href="#">Affiliate and Accept</a> OR Enter New Family ID to lookup: <input type="text"/> <a href="#">Lookup</a> OR <a href="#">Retire Without Processing</a>	
Page 1 of 1		Go to Page: 1		1 - 1 of 1 records		

11. After matching Family ID's and choosing [Accept Match] the Status of this donation will change from "Pending" to "Imported" or if the family had to be looked-up, "Assoc\_Imported."

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Original File Information						
Family ID	Customer Name	Address	Phone/Email	Fund Name/ Site Affiliation	Contribution	Status
Page 1 of 1		Number per Page: <input type="text" value="25"/>		<input type="button" value="Change Count"/>		1 - 2 of 2 records
			Go to Page: <input type="text" value="1"/>	<input type="button" value="Go"/>	1	
				7641:Pre-Cana	CC \$100.00 8/27/2013	Assoc_imported
				Posted to: Ministries : PreCana Affiliation: The Diocese of Pensacola-Tallahassee Pensacola		
				7258-596:Holy Name of Jesus 2013	CC \$80.00 8/27/2013	Imported
				Posted to: CSA : 2013 Affiliation: Holy Name of Jesus Parish Niceville [P]		
Page 1 of 1		Go to Page: <input type="text" value="1"/>		1 - 2 of 2 records		

12. You can review the files uploaded and payments applied from Vanco File Management and viewing the 'Processed' files. If you again choose [process] it will NOT re-apply payments BUT shows you the details of Families, amounts, accounts – again, on TWO LINES for each donation (TOP is Vanco, BOTTOM is ChurchDB.)

Vanco PLEDGE Imports:

Same as above.

If an existing pledge for the same parish, same fund already exists, you must choose the “Check to close Existing Pledge” box. (see below.)

Celeste Durand (Organization Administrator) of the Diocese of Pensacola-Tallahassee (Pensacola).  
Current Family / Member: None selected  
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Original File Information						
Family ID	Customer Name	Address	Phone/Email	Fund Name/ Site Affiliation	Contribution	Status
Page 1 of 1		Number per Page: <input type="text" value="25"/> <span style="border: 1px solid black; padding: 2px;">Change Count</span>		1 - 1 of 1 records		
		Go to Page: <input type="text" value="1"/> <span style="border: 1px solid black; padding: 2px;">Go</span> <input type="text" value="1"/>				
820889	SMITH, ALLEN	1839 LINDSEY MAGNOLIA CT NAVARRE, FL 32566	zack286@mchsi.com	7258-605:St Sylvester 2013	Pledge Start Date: 10/15/2013 End Date: 12/31/2013 Schedule: \$200.00 x 3 (Monthly) = \$600.00 Installments: 3	Pending
820889	Mr. & Mrs. Allen & Connie Smith	1839 Lindsey Magnolia Ct. Navarre, FL 32566	850-939-0676 zack.smith@mchsi.com	CSA : 2013 Affiliation: St Sylvester Parish Gulf Breeze [P] <input checked="" type="checkbox"/> Check to close existing pledge of \$600.00	? <span style="border: 1px solid black; padding: 2px;">Accept Match</span> OR Enter New Family ID to lookup: <input type="text"/> <span style="border: 1px solid black; padding: 2px;">Lookup</span> OR <span style="border: 1px solid black; padding: 2px;">Retire Without Processing</span>	

Page 1 of 1 1 - 1 of 1 records  
Go to Page:

If there are NO payments recorded on the existing pledge, it will be deleted and replaced with the one being imported.

If there ARE payments recorded, the existing pledge will be closed and another one created with the data from Vanco.

Statements are run based on date ranges, so the donor will still get accurate amounts received; the “pledge amount” will be from the “open” pledge. Year End Tax Letters will have a total of ALL gifts made to that fund.