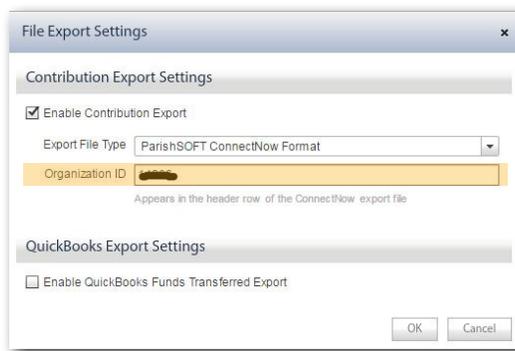


CONNECTNOW IMPORT PROCESS

Pre-Import Steps

- 1 In the WeShare **Control Panel**, click the **File Export Settings** icon.
- 2 Enter your ConnectNow **Organization ID** number. Click **OK** to save.



To find your Organization ID in ConnectNow go to the Administration tab, System Setup, Organization Licensing.

- 3 In the WeShare **Control Panel**, click on the **Manage Giving Opportunities** icon and any **Manage Collection** button. Then click the **Collection Details** icon.
- 4 In the ConnectNow Fund ID field, enter the **ConnectNow Fund ID** that corresponds to that collection and click **OK** to save. Repeat this process for each collection.



Need help locating the Fund ID in ConnectNow? Follow the instructions below, otherwise skip to Step 5.

1. Open ConnectNow **Family Suite**.
2. Once open, click the **Offering** tab.



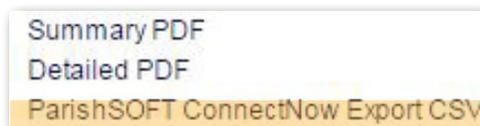
3. Click Funds. Use the **Fund ID** highlighted below.

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
42		230	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
400-05-08	All Saints	222	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
400-05-12	All Souls	226	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
400-05-15	Ascension	218	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
44	Ash Wednesday	232	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
400-05-16	Assumption	219	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
900-09-02	Bishops Overseas Appeal	229	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
45	Bishops Pastoral Appeal	233	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
900-02	Black And Indian Missions	202	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
420-02	Book Fees	197	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- 5 In the WeShare **Control Panel**, click the **Manage Users** icon and then on any individual donor missing an **Envelope ID** number. Navigate to **Giving Account Settings** tab.
- 6 In the WeShare **Envelope ID** field, enter the Envelope Number for the parishioner and click **OK**. Repeat this process for every donor.

Preparing the WeShare Export File & Importing

- 1 Go to the WeShare **Control Panel**, click on the **Reports & History** icon. Select from either the **Transfer Reports** (to import each deposit separately) or the **Financial Export** (to import multiple deposits grouped by date range) icon.
- 2 Choose the report you want to upload into ConnectNow and select the **ParishSOFT ConnectNow Export CSV**.



- 3 You will then be prompted to **Save** the file. Save it into a folder on your computer that will be easy for you to find later. Create WeShare folder if needed.



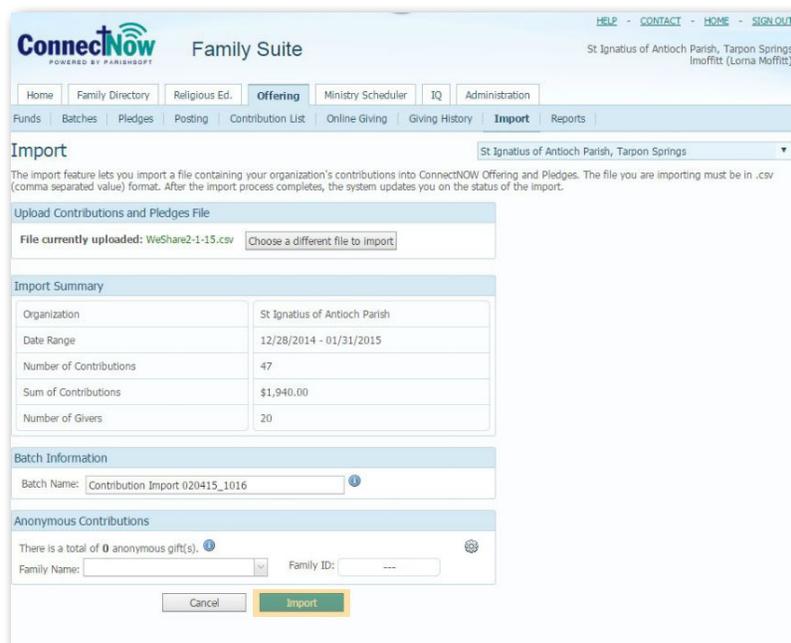
4 Once the file is saved, open **ConnectNow Family Suite**.

5 Click the **Offering** tab, then select the **Import** tab.



6 Retrieve file for processing by selecting **Browse**. Navigate to the folder where you previously saved the **ConnectNow Export CSV** file and click to open it.

7 You will then see an Import Summary of what will be imported. Click **Import**.



- 8 A message will pop up letting you know the import is in progress. Do not click anything



- 9 Once complete you will receive a **Success** message. Click **Batches** tab to view what was imported.



Home Family Directory Religious Ed. **Offering** Ministry Scheduler IQ Administration

Funds **Batches** Pledges Posting Contribution List Online Giving Giving History Import Reports

Batch Management St Ignatius of Antioch Parish, Tarpon Springs

50 records Add Batch Delete Batch(s) Close Batch(s) Quick Reports

Status	Batch	Cash	Pledge	Count	Fund	Batch ID
Open						
<input type="checkbox"/>	Open Contribution Import 020415_1016	\$1,860.00	\$0.00	43	Offertory	96896
<input type="checkbox"/>	Open Phase 3 Pavers 10-31-2014	\$12,724.00	\$0.00	57	Paver Project	96865
<input type="checkbox"/>	Open Weekly Offertory 1130am 1-11-15	\$6,257.75	\$0.00	0	Offertory	96715
<input type="checkbox"/>	Open Weekly Offertory 600pm 1-11-15	\$2,813.00	\$0.00	0	Offertory	96716
<input type="checkbox"/>	Open Weekly Offertory 900am 1-11-15	\$3,722.00	\$0.00	0	Offertory	96714

Page 1 of 1 (5 Records)