Adding a Offertory Pledge fund and Pledges for 2014

1) To add in a new fund for Offertory Pledges for 2014, you will need to be a Parish Administrator.
2) First, log into the ParishSOFT Offertory screen.
3) Click on the Add/Edit/Delete Funds button.
4) The Funds screen will open. Find the current description of the Offertory Envelope 2013 fund that you are using, and the number. See the example below:

5) Next click on the Add button on the bottom middle of the screen. See Below.
6) Enter the Chart of Account # into the Account Number field: 4010014 (for Offertory Envelopes 2014). Tab through and it will fill in the QuickBooks Account number. (or fill it in with 40100 if your accountant prefers that number to show on the report) Select Tax Deduct as this fund is a Tax Deductible fund per the Diocesan Chart of Accounts. Fill in Fund Description with: Offertory Envelopes 2014. Finally, click Update in the bottom right side of the screen.

7) It will verify that you want to add this fund. Click Yes.

8) Next, it will ask if you want to set the fund permissions for everyone who has Contribution permissions. Almost all of the parishes in the Madison Diocese will select Yes, unless you are a parish that has set up individual fund permissions for each user.

9) Finally, close out of the Funds screen using the Close button on the bottom right corner.

10) You should be back at the Offering and Pledges screen.

11) Next select Manage Membership Pledge Records.

12) A Manage Membership Pledge subscreen will open. In the upper-middle area that says “Pledge Fund”, click on the drop down and select your next year’s Offertory Envelope 2014 pledge fund.
Entering pledges in via the Standard Method

A. Click on the Add button on the upper left side in the Manage Pledge Screen as seen below:

B. A search screen will appear, seen above. Search for the family in your database click to highlight them and fill their information into the Selected Family area in the upper right corner.

C. Click the Select this family button in the bottom right corner. (If your search doesn’t show the family, switch the filter preferences as seen above, to indicate Not Registered).

D. When the family is in the Pledge screen, highlight the family and on the right side, click on the Pledge Date. Change this date to the first of the year 1/1/2014. Hit Tab, and change the Down payment date to 1/1/2014.

E. Tab through the down payment amount to leave it at zero. (If there is a payment associated with the pledge, this will be input into the system through the Post Contributions screen, and it will need to be entered in for January, unless the family did not intend it to be a January contribution.)

F. Tab till you are to the right of the Down Payment in the Total Pledged field. Enter in the total amount of their Pledge. (if known through their pledge commitment card) See Below.
G. Under **Payment Schedule**, enter in the frequency of when their payments are **Due**: per week, month, etc. If the individual has specified a weekly or monthly amount and not specified a “Total Pledged”. You can click on the **Calc Total Pledge Amount** button to find out the total amount pledged over the specified amount of time. (*For a One-time gift giver, when they’ve already sent in the full amount, under the Payment Schedule, indicate for Due: One Time.)

H. In the **Send Statements** area make sure each month has a check next to it. Whenever printing reports, if the boxes haven’t been checked, the families report won’t appear. (No reports will be sent out automatically, you have to run the report and print it for these families before they will receive a statement or letter.)

   ![Send Statements](image)

   The month indications assist you so you can include or exclude a family if you are sending monthly or quarterly statements and they are an exception to all the other families you’re sending. (If this is the case then you would want to Un-check the boxes seen above)

I. Leave the **Post Payment** portion of the screen empty, as all payments are posted through the Offertory in Batches.

J. Finally, click on the button on the bottom left that says **Update**. You’re done and ready to enter the next pledge.