Adding a Offertory fund in ParishSOFT
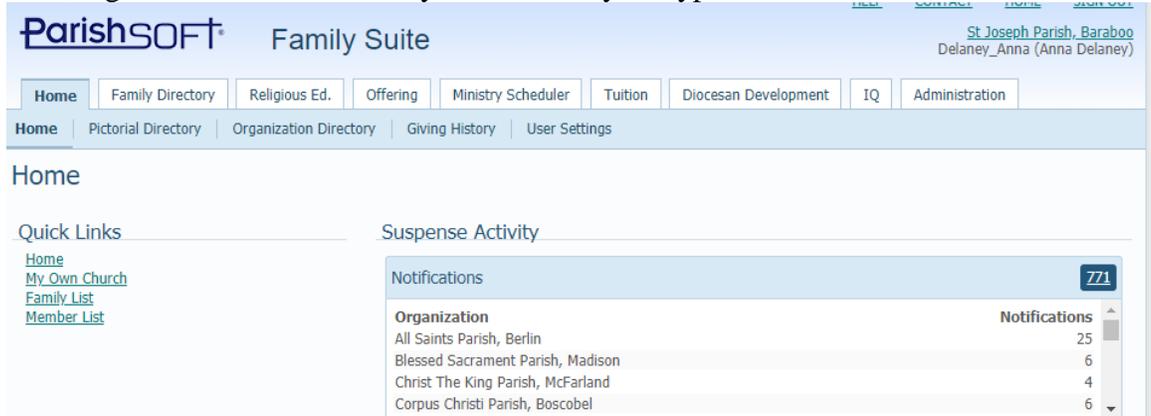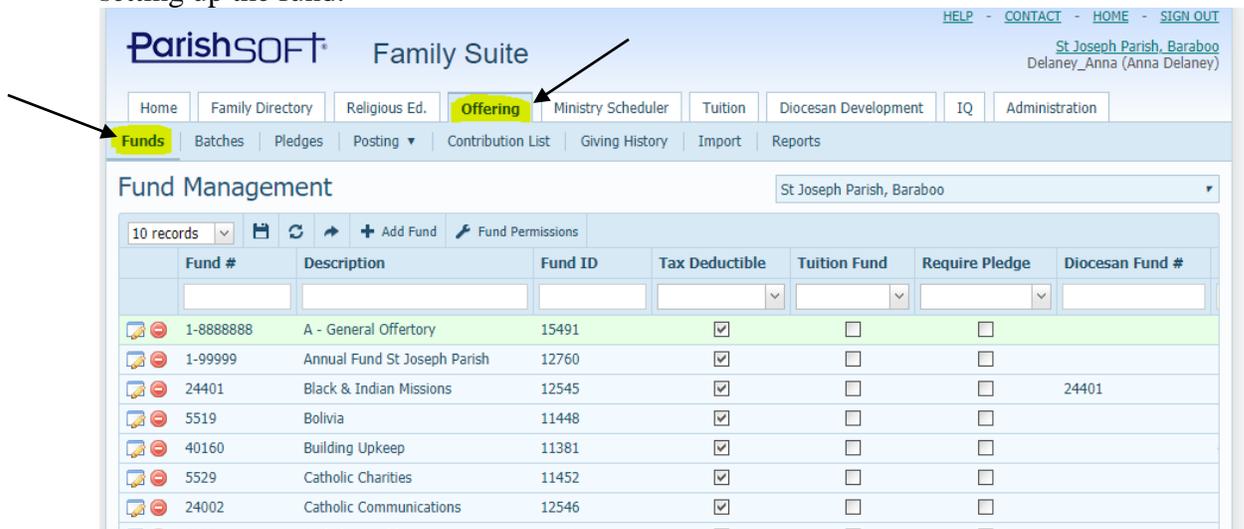
1) First, log into **ParishSOFT** and you will be at your typical home screen:

2) Next, click on **Offering** tab and then on **Funds** area in the blue area below the Offering tab, as seen below. Your screen will be similar to below:

Please note: If you cannot see funds, or any of the steps below are not consistent with your screen, check with your main administrator of Connect Now for help in setting up the fund.

3) Click on the **Description** header to have the system group the funds according to their names. Next, page to search to see if a fund is already set up which will fulfill your posting criteria.

Fund Management — Good Shepherd Parish, Lima

	Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
	4010013	Offertory 2013	19192	☑	☐	☐	
	4010014	Offertory 2014	19369	☑	☐	☐	
	4010015	Offertory 2015	19370	☑	☐	☐	
	4612015	RE Tuition 2015	19356	☐	☑	☐	
	24052	Respect Human Life	19190	☑	☐	☐	
	52	Sunday Offering	19351	☑	☐	☐	

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Please note that in the example above, we have set up Offertory funds, for each year for this parish, as the parish has pledges which need to have a new Offertory fund set up each year.

All the other funds in the system tend to be ongoing funds that you keep posting to year after year. (See the Respect Human Life fund above) If, you wished instead for it to be named "Respect Life", you could modify the name in the area above by clicking the Edit button. However, you would only want to edit a fund where what the description was, matches what the funds are which you will post in the future. (Ex: it's fine to rename the Respect Human Life fund to the Respect Life fund, but it's probably NOT a good idea to rename the Sunday Offertory funds to the Building Fund, as the Sunday Offertory most likely had a history of Offertory donations in the fund, which would then show up as building fund donations)

If in doubt about editing a fund, either contact the Diocese or add a fund instead.

4) To add a fund , click on the **Add Fund** button seen below.

Fund Management — St Joseph Parish, Baraboo

	Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
	1-8888888	A - General Offertory	13491	☑	☐	☐	
	1-99999	Annual Fund St Joseph Parish	12760	☑	☐	☐	
	24401	Black & Indian Missions	12545	☑	☐	☐	24401
	5519	Bolivia	11448	☑	☐	☐	
	40160	Building Upkeep	11381	☑	☐	☐	
	5529	Catholic Charities	11452	☑	☐	☐	
	24002	Catholic Communications	12546	☑	☐	☐	

5) The **Add Fund** screen should open as seen below:

6) Enter in the Fund # in the first field, name of the new fund, and whether it is Tax Deductible or not. Finally Click the Save or Close button to exit out of the screen.

7) You should now see the new fund in the listing, as seen below:

8) Next, you will need to set the fund permission for the fund. Click on the **Fund Permissions** area indicated in the screen above. You will see the **Manage Fund Permissions** screen, similar to the screen below.

9) Scroll down to then select your fund on the left side, (Offertory 2016 is used as an example below), verify which members/volunteers at the parish are OK to view this fund, by checking who is selected with a checkmark in the boxes on the right side of the screen. Change the check marks if needed by selecting or deselecting and click **Save.**

When done setting the fund permissions, click the **Close** button.