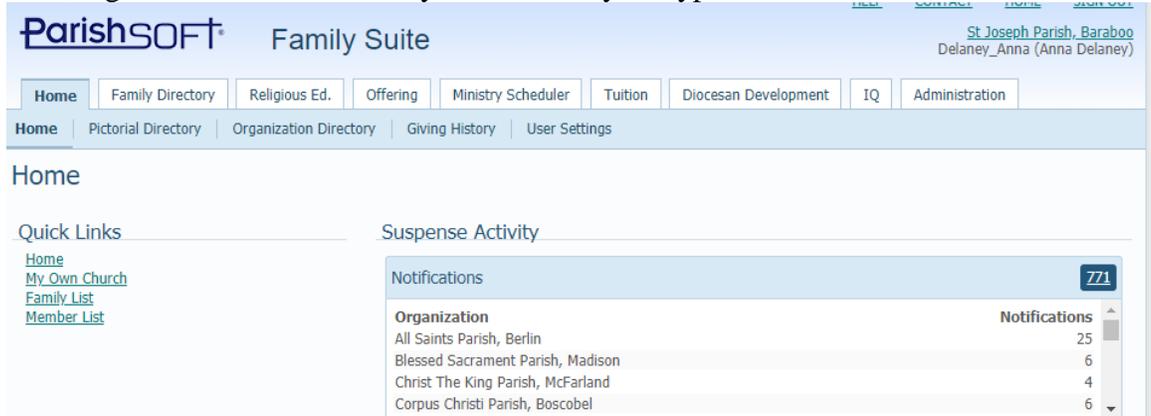


Adding an Offertory fund in ParishSOFT

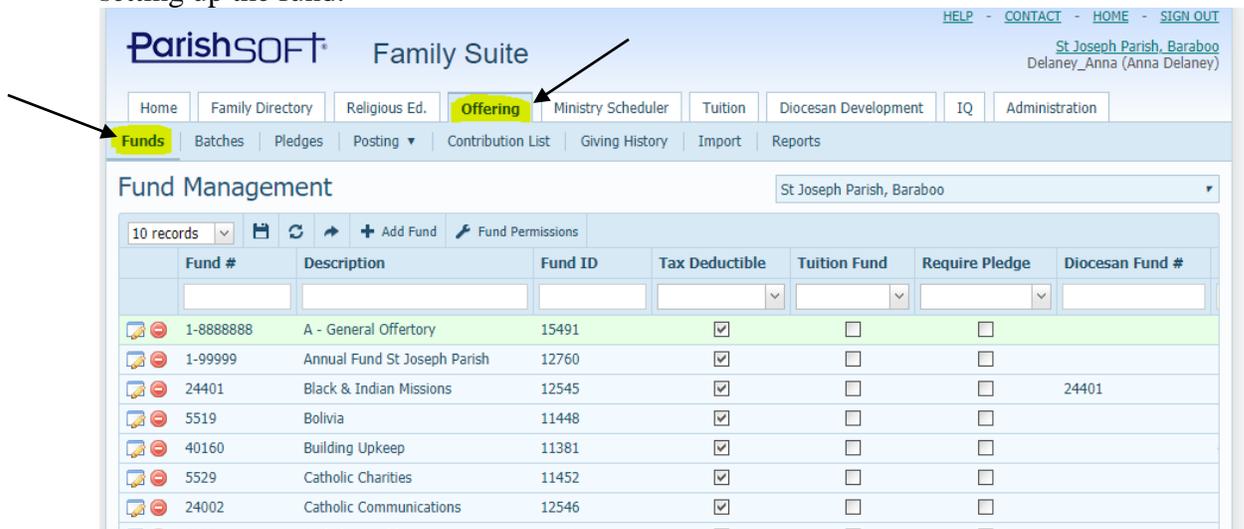
- 1) First, log into **ParishSOFT** and you will be at your typical home screen:



Organization	Notifications
All Saints Parish, Berlin	25
Blessed Sacrament Parish, Madison	6
Christ The King Parish, McFarland	4
Corpus Christi Parish, Boscobel	6

- 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.



Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
1-8888888	A - General Offertory	15491	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1-99999	Annual Fund St Joseph Parish	12760	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24401	Black & Indian Missions	12545	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24401
5519	Bolivia	11448	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40160	Building Upkeep	11381	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5529	Catholic Charities	11452	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24002	Catholic Communications	12546	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- 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 Sheoherd Parish, Lima

10 records + Add Fund Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
4010013	Offertory 2013	19192	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4010014	Offertory 2014	19369	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4010015	Offertory 2015	19370	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4612015	RE Tuition 2015	19356	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
24052	Respect Human Life	19190	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
52	Sunday Offering	19351	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Page 2 of 2 (16 Records) < 1 2 >

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

10 records + Add Fund Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
1-8888888	A - General Offertory	15491	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1-99999	Annual Fund St Joseph Parish	12760	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24401	Black & Indian Missions	12545	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24401
5519	Bolivia	11448	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40160	Building Upkeep	11381	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5529	Catholic Charities	11452	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24002	Catholic Communications	12546	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

Add Fund

Fund #*:

Description*:

Start Date:

End Date:

Diocesan #:

External #:

Tax Deductible: Tuition Fund:

Require Pledge: Enable Import:

- 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.

School Endowment Fund

Fund #: 49410 Fund ID: 11421

Description*: School Endowment Fund

Start Date:

End Date:

Diocesan #:

External #: 49410

Tax Deductible: Tuition Fund:

Require Pledge: Enable Import:

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

Fund Management St Joseph Parish, Baraboo

10 records

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
493005	school		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
49410	School Endowment Fund	11421	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40150	School Support	11380	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
49100	School Tuition 4K-8th	11406	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Page 1 of 1 (4 Records) 1

- 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.

Manage Fund Permissions

Manage by Fund | [Manage by Member](#)

Funds

- 1131-10 Building Fund
- Building Fund Campaign
- Building Pledge 2015
- Confirmation
- Envelope
- Festival
- General Fund
- Holy Days - Special Collections
- Mother Teresa Foundation
- Offertory 2012

Members - [Select All](#) - [Clear All](#)

- Dale, Marcia
- Lamb, John
- Spindler, Kim
- Whiting, Frank

- 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**.

Manage Fund Permissions

Manage by Fund | [Manage by Member](#)

Funds

- Holy Days - Special Collections
- Mother Teresa Foundation
- Offertory 2012
- Offertory 2013
- Offertory 2014
- Offertory 2015
- Offertory 2016
- RE Tuition 2015
- Respect Human Life
- Sunday Offering

Members - [Select All](#) - [Clear All](#)

- Dale, Marcia
- Lamb, John
- Spindler, Kim
- Whiting, Frank

Save Close

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