Adding Pledges in ParishSOFT Offering

If the pledge you wish to create is on a new fund (like Offertory for the upcoming year, as each fund can only have one pledge per family) then first create the fund, and verify that all those needed have permissions for the fund. In the Offering < Settings area, make sure that the system automatically associates all donations to the pledges by check marking the Batch Posting – Use Pledges by Default.

Adding Pledges by Batches

This is the most efficient way to enter in many pledges at once, as it allows you to set the fund and date as a default for a group of pledges.

1) Under the Offering tab, click Batches, and click the + sign in the toolbar buttons on the right side, indicated below to create a new batch.

2) Fill in the appropriate information to create a new pledge batch. In the example below, we’re creating one for Offertory pledges that start on January 1st, 2021.

Please note that you do not have to count up your pledge cards, nor the pledge amounts to create the batch, but each batch requires at least a Contribution Amount. Enter in 0 for that field. Then hit the Save, as seen indicated above.
3) Like other newly created batches, you see that the batch was created and now we have the options in the toolbar buttons to post items to the batch. Click the **Postings** button seen below.

![Batch Details](image1.png)

4) Click on the Pledges section to get to the area where we will be adding new pledges.

![Pledges Section](image2.png)

5) Verify in the Defaults section on the right side, that your fund and date is correct. To add in a Pledge, click the **+ Add Pledge** button in blue on the left side.

   *Note: You can click either the Tab or the Enter button as a shortcut and time saver to move around the fields or activate a click as seen below.*

6) Your screen will show similar to below. Note that your cursor is already in the ID field. Click the **Enter** to search in this field by pulling up the Directory Search.

![Pledge Details](image3.png)
7) You will next see the **Directory Search** screen similar to below. Hit the Tab button twice, which will move your cursor to the **Last Name** field where you can type in the last name of the family and then hit the **Enter** button to activate the Search.

8) You will see the results as seen below. To select the first record, just hit the **Enter** button. Otherwise, hit the **Tab** button to move the highlighted field down the list. Once the system has highlighted the family’s last name you wish to select, hit **Enter** button to pull them into the pledge screen.
9) The selected family will now show on your pledge entry screen as seen below.

If the Initial Pledge area highlighted above is still greyed out, you may have to click the + Add Pledge button.

Please note that the Diocese has communicated with ParishSOFT and they will be removing this additional step of clicking + Add Pledge as it’s redundant when first starting to add in pledges. This step was still needed to create a new pledge as of 11/17/21.

10) Enter in the Initial Pledge amount, as seen highlighted below. Check that the Installment Amt is calculating correctly, and/or edit the Frequency. You may need to scroll down to see the frequency.
11) When complete click the **Save Pledge** button as seen below. The screen will refresh and you will see the saved information as seen below.

![Batch Form](image)

12) To add the next pledge, click **+ Add Pledge** and the record will indicate, as seen below, that you are starting a new pledge and have yet to look up a family. The cursor is again in the ID lookup field, so just click Enter again to get to the **Directory Search** screen. And follow the steps above to enter in another pledge.

![Add Pledge Form](image)
13) When you’ve completed all the pledge entries, back on the toolbar buttons, as seen below, select the **Batch Details** button to adjust the batch totals for the pledges.

14) On the **Batch Details** page, adjust your **Pledge Amount** to match what was entered in on the batch, scroll to the bottom to view the **Reason** box, fill in a reason for adjusting the batch, then then scroll to the top right toolbar and click the **Save** icon.

15) Lastly, go back to the Postings screen, seen below, and click the **Review**. Also, click the **Export** icon to print a report. Do one last review of all your pledges with the original documents to verify your entries. When everything looks correct, click the icon on the toolbar to **Close** the batch so that the pledges are recorded on the Family’s record.