Editing Contributions in Closed Batches in ParishSOFT

Follow the steps below to edit a contribution in a closed batch. The following shows the automated process in the ParishSOFT Offering module.

1) After logging into ParishSOFT, you will see a screen below. Click on the Offering tab, seen highlighted below.

![Offering Tab Highlighted](image)

2) On the left side, click the Contributions area. Enter the correct information in your filtering area on the right side, the example below is searching for donations in a date range, then click the magnifying glass to see those individuals.

![Contributions Filtering](image)

3) If you need to find more specific information, you can type in additional information on the right side, or in the upper area. After you’ve found all, if not most of the contributions you need to change, we’ll select the individuals. Only select the individuals that all have something in common to change. Ex: Moving all postings in the batch from one fund to another, or one date to another.
4) After selecting all the donors that need to correct one specific correction, click the double checkmark, seen below to create a correction batch.

5) You will see the screen below. First select the values on the right side you wish to change. In the example above, we were switching three donations from Offertory to the Flowers fund, so we’d first select the Fund on the right side, then select the new fund, and put in a name for the Correction batch.
6) After entering in a name for your correction batch, hit the Save icon in the upper right corner. Click Yes to create the correction batch.

7) You will see a confirmation that the batch was created and then you’ll see the newly created batch appear, as similar to below. Recognizing the new name of your correction batch.

8) Just like any other batch, you can review the lines created by the system, by clicking on the Postings icon in the upper right corner to see the correction postings within this batch.
9) The correction postings will have a negative value for the existing donation, along with a corresponding positive posting to display the correct posting, similar to the screen below. This creates a clean and clear audit trail to account for any changes made in the system and helps protect the user when adjustments are made.

10) Just like any other batch, click the checkmark to Close the batch, as seen below.

11) And also click the Export icon to print out your correction batch.