Adding Funds and Setting Permissions

The following directions describe how to add Funds into the Offertory area.

1) Under the Offering tab, click on the Funds area, on the left side bar. Your screen will appear similar to below:

   ![Add Funds Screen](image1)

2) Click the blue + icon, in the upper right hand corner of side of the screen below your name. The add fund screen will appear similar to below.

3) First, un-check the **Fund Accepts Sustaining Gifts**. Sustaining gifts are ongoing donations that are considered “forever gifts” that never expire. Sustaining givers must commit to donating a specific amount on a recurring basis with no end date. Currently, our parishes are reaching out to verify Pledges, as it allows for greater flexibility in reporting and better communication with the donor, not taking for granted that they will always keep giving.

   ![Fund Details Screen](image2)

4) Add in a **Fund Name** and a corresponding **Account Number** (which should be similar to the account number in Quickbooks or have an additional 2 digits following the account number to
allow for a unique number in this field as required by ParishSOFT. As Offertory is usually
Account number: 40100 in QuickBooks for each year if needed due to pledges or pledge history,
you may be adding in a new: Offertory 2022 with 4010022 and the last 2 digits indicating the
year.) The system will automatically generate a Fund ID when the fund is created.

5) Also check mark the **Fund is Active** box, as indicated above. This means that the fund will show
in the Batches area and allow you to post to that specific Fund. If you wish to NOT post to the
fund, you may un-check the **Fund is Active** area.

6) Do NOT enter in a **Start Date** and/or **End Date** unless you wish to restrict the postings in the
Fund to just these dates. This should only be used when needing to assist volunteers to NOT
post to a fund by adding in an End Date. Likewise, if you add in a **Start Date**, you will not be able
to enter in any donation unless it is on or after that start date.

7) Verify the status of the fund and select if it is **Tax-Deductible** or **Not Tax-Deductible**.
a. **ParishSOFT can track Non Tax-Deductible donations**, which many Pastors wish to record, so they can get an accurate picture of donors giving history. This may include required minimum distributions from retirement savings accounts that the donor has given to the parish, even if the check comes from a retirement management firm. You must verify if the donation is tax deductible or not.

8) Finally click the **Save** icon as seen below to create the Fund.

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**Setting the Fund Permissions**

You must set the Fund Permissions in order for others in your organization to view the fund, regardless of their status in the system.

1) Go back to the main Funds screen, as seen below, and click the **Fund Permissions** icon to open the permissions by member, as seen below.
2) And select all your users, adding them in, otherwise, this is the screen shot you see. Select the name of each individual on the left side, scroll till you find your fund on the right, and then checkmark the box, to give the user permission to view the fund. Then click Save.

Complete for all staff members at the organization that should be able to view the fund. Only give permissions for the funds to those that need to view this information.

Please Note: There may be some staff members that have the ability to view funds, but only very specific funds. Ex: Religious Ed staff may only be able to view RE funds, so as to enable them to follow up on the families that have not paid yet for the year.