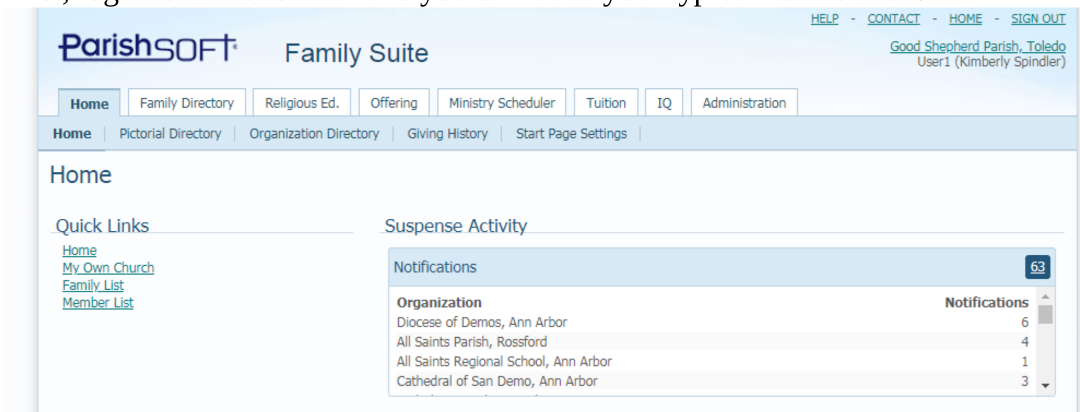
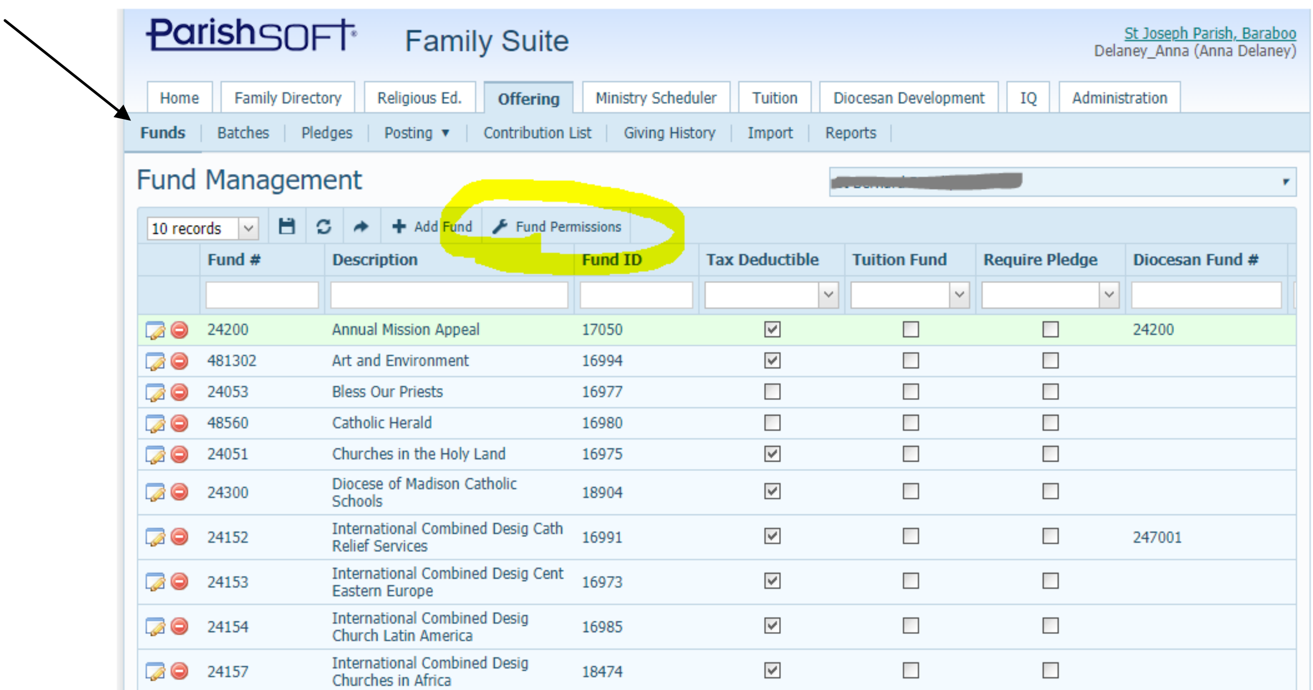
Hiding Offertory Funds in ParishSOFT

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

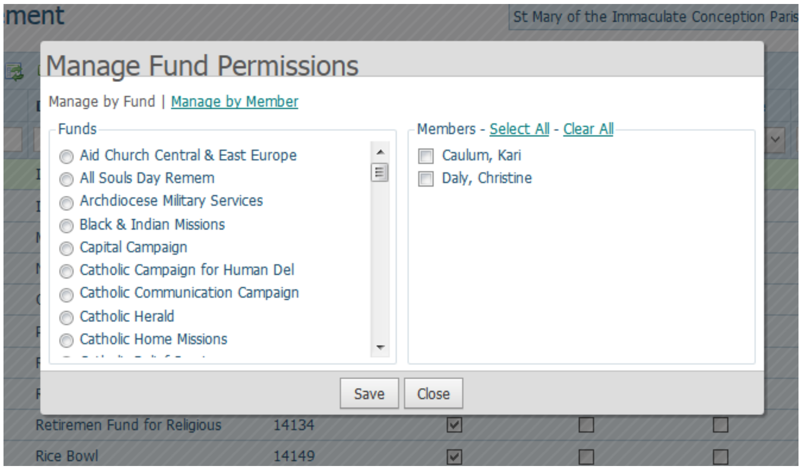


2) Next, click on **Offering** and then on **Funds** in the upper tabs. Your screen will be similar to below:

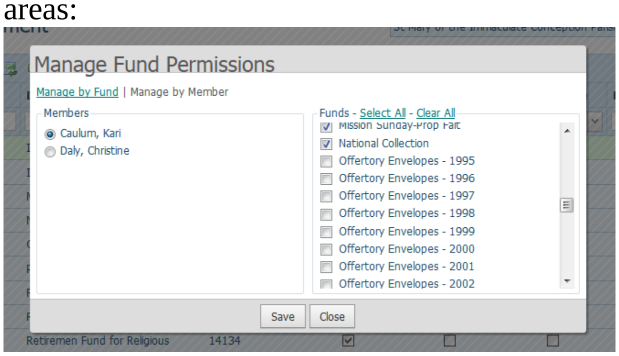


3) Under the section titled **Fund Management,** look for the teal buttons called **Add Fund** and **Fund Permissions.** Click on the **Fund Permissions. (seen above)**

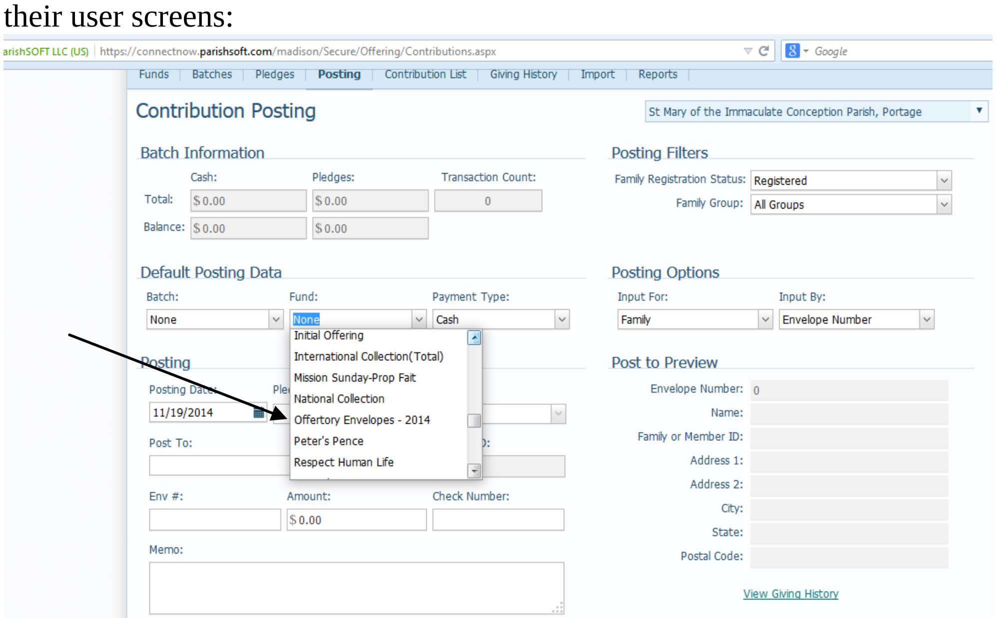
4) You should see a screen similar to below where you can specify either per Fund or per Member whom has the ability to view what fund. If you do not grant a staff member permission to a fund on this screen, they will not see that fund ANYWHERE in the Connect Now platform.



5) When we highlight a specific staff member and see that they have and don’t have specific funds…we notice that they also aren’t shown in the other ParishSOFT areas:



This staff member can’t view any of the offertory funds beyond the 2014 one on their user screens:



6) Likewise, if this staff member has the ability to view contribution history, they won’t be able to view any of the funds they don’t have permissions for.

Note: If you are a parish admin, this is the best way to “hide” old or not in use funds from seeing them even on your own screen, say if you do not wish to view historical funds that are older than 7 years ago. Un-assign yourself permission and later re-assign it when you need to view the funds.