Adding a Offertory Pledge fund and Pledges in ParishSOFT
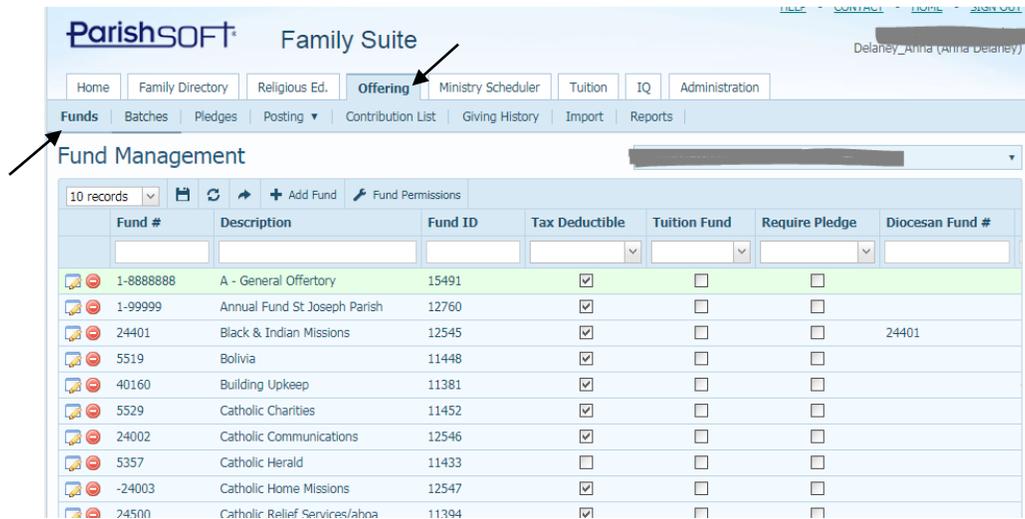
1) First, log into **ParishSOFT** and you will be at your typical homescreen:

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 ParishSOFT for help in setting up the fund. (as you may not have permissions to do this in your system)

3) Page down to find the current description of the Offertory fund which you are using this year and it's number. See the example below with the 2018 fund. You will follow this naming convention for the upcoming year. (using fund # 4010019 as seen in the example below)
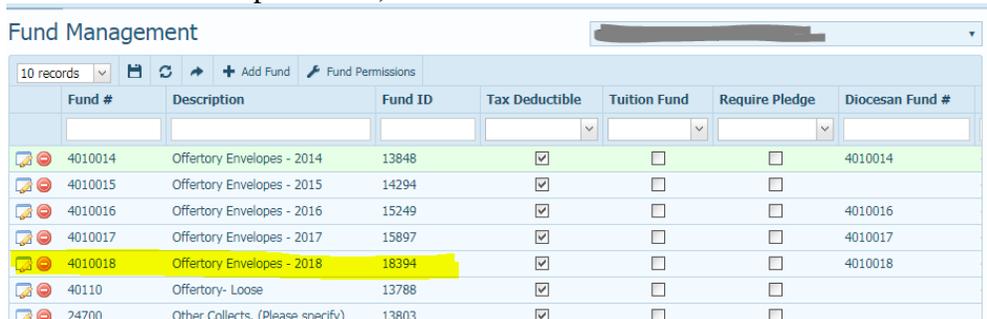
As seen in the example above, if we're setting up a "2019" fund, we will be using the Fund #: 4010019 and the description: Offertory Envelopes -2019. (you could also use 2019 Offertory or Offertory -2019 if that is a better description of what is collected in this fund.)

4) To add a fund , click on the **Add Fund** button seen below.
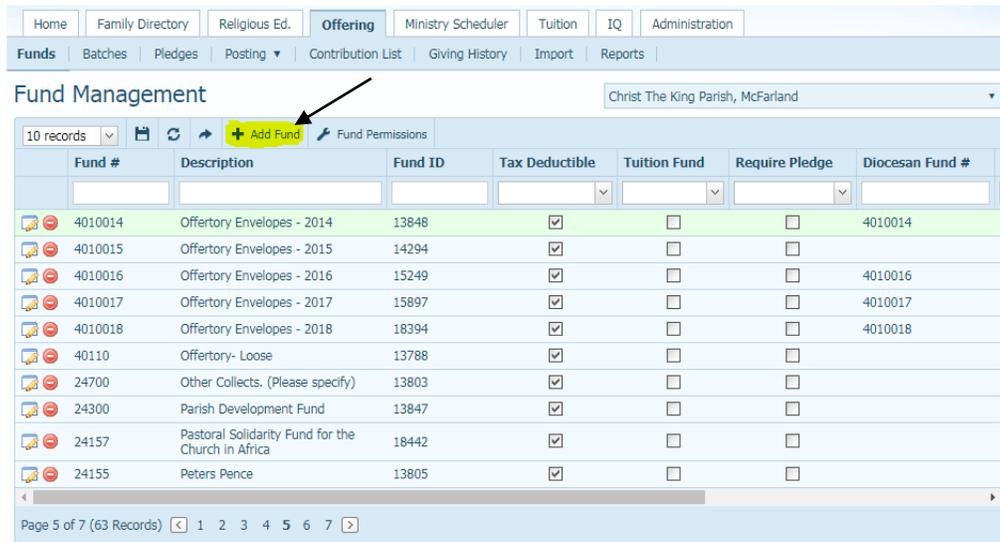
5) The **Add Fund** screen should open as seen below:

6) Enter in the Fund # in the first field: 4010019 (most likely, for Offertory Envelopes 2019). Fill in **Description** with: **Offertory Envelopes 2019** (or Offertory 2019, 2019 Offertory, etc. as mentioned in the example above). Select **Tax Deductible** checkbox and then click **Add Fund** to save this new fund. (your screen should be similar to the screen below)

7) You will see a confirmation that the fund is added (as seen below) click Close to **Close** button to exit out of the screen.

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

9) Next, you will need to set the fund permission for the fund. Click on the **Fund Permissions** area seen below. You will see the **Manage Fund Permissions** screen show as a popup.

10) Scroll down to select your fund on the left side, verify which members are OK to view this fund, by checking the box next to their listing, then click **Save.**
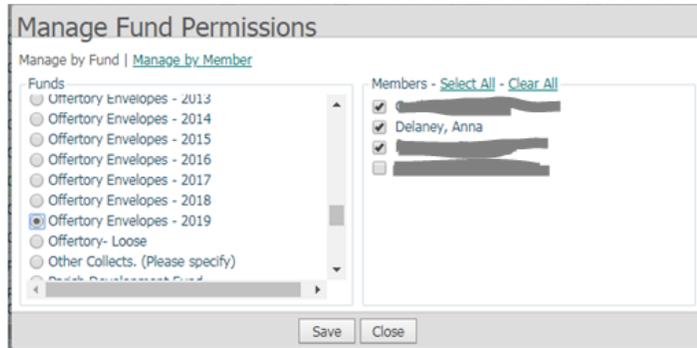
When done setting the fund permissions, click the **Close** button.

Entering Pledges in with the Standard Entry process:

11) Under the **Offering** tab click on the **Pledges** area as seen below:
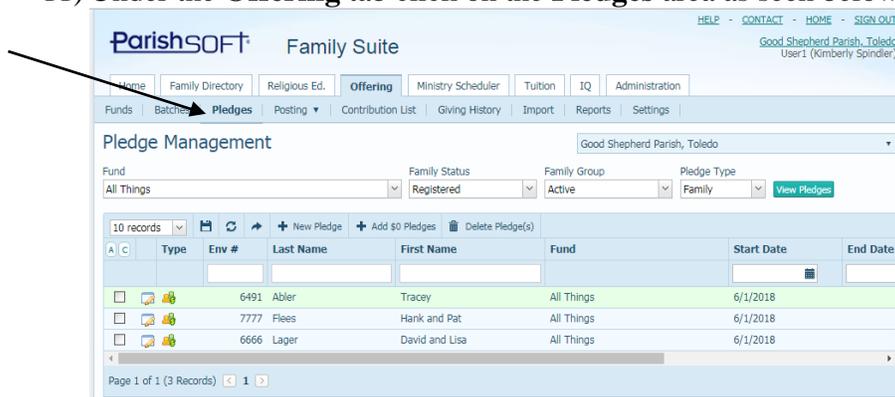
12) First, select the **Fund** from the dropdown area: (shown below) Then click the **View Pledges** button to see if any pledges are already set up in the system.
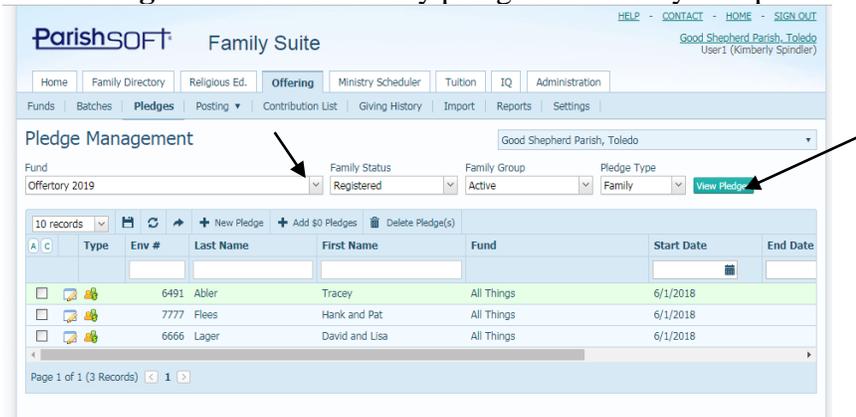
13) Next click the **New Pledge** button also indicated above. You will see a **Pledge Family Search** screen similar to the one below. If you wish to search for the family, start typing their last name in the white box below the **Last Name** header, then click Enter (or Tab) on your keyboard for it to search and show just those familes with that last name:
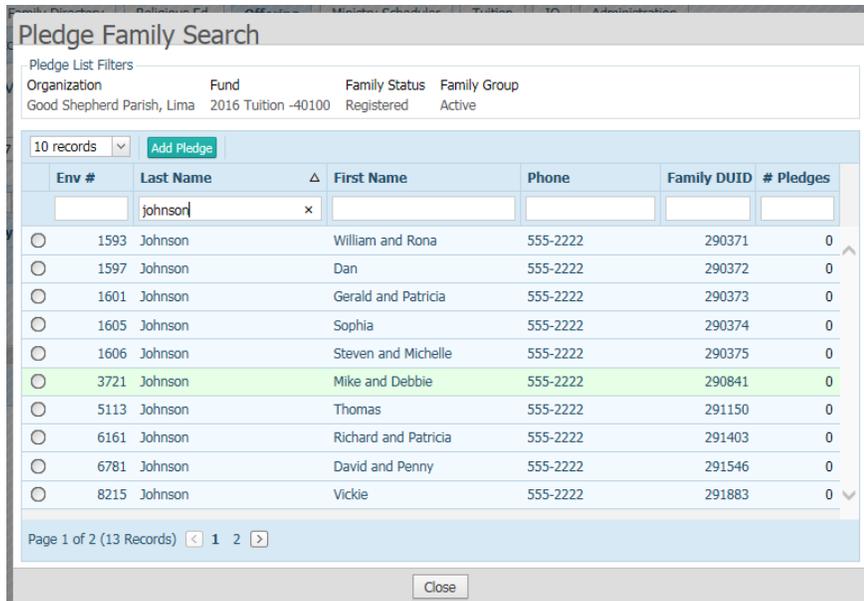
14) Select the family by clicking radial button in front of the family,(as seen above) then select the **Add Pledge** button.
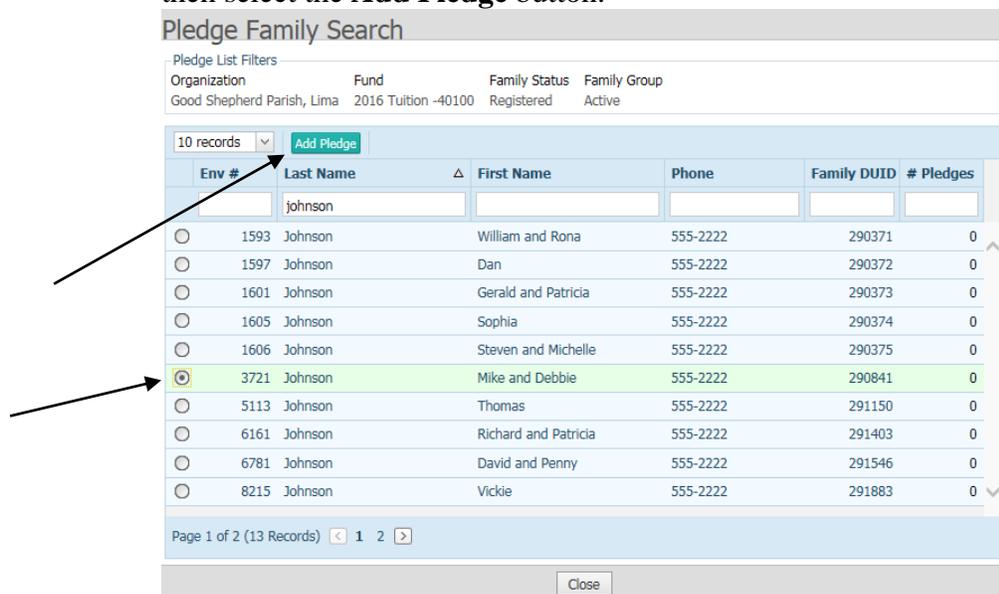
15) You will see the **New Pledge** screen, similar to the screen below. Click on the date in the **First Payment Date,** and switch the data to 1/1/2017. Hit **Tab** to save your change. You can either type it in, or select the date via the calendar button.

Next, click in the **Pledge Date** record and type in or select 01/01/2017. Hit **Tab** to save your change. Type in the **Pledge Amount** , set the **Frequency, #of Months,** and **Payment Amount.** (A typical pledge screen prior to saving will appear similar to the one below)

In the **Batch** area, select the **None** option, to NOT put these pledges into a batch.

16) When all looks correct, click **Add.** You will receive a message that the pledge was created:

Message from webpage

⚠ Pledge record created.

OK
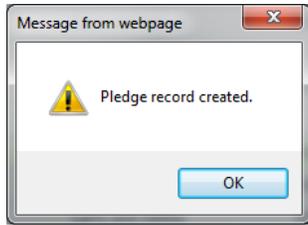
17) Click OK and you should still be on the **Pledge Family Search** screen, ready to type in and search for the next family. Search for the family, click the radial button to select the family, then click **Add Pledge** to add then next pledge.

Pledge Family Search

Pledge List Filters

Organization	Fund	Family Status	Family Group
Good Shepherd Parish, Lima	Offertory 2017	Both	All Groups

10 records ▾ Add Pledge

	Env #	Last Name △	First Name	Phone	Family DUID	# Pledges
		smith				
○	123456789	Smith	Bert	555-2222	223224	0
○		Smith		555-2222	225692	0
○		Smith	John and Jane		289975	0
○		Smith	Robert and Mary		289976	0
○	421	Smith	Mike and Patty	555-2222	290080	0
◉	855	Smith	Dave and Nancy	555-2221	290165	0
○		Smith	Thomas and Lori	555-2222	291180	0
○	5275	Smith	John and Linda	555-2222	291199	0
○	5465	Smith	Joanne	555-2222	291245	0

Current Issue as of 10/21/2016:

*Currently, if you don't know of the **Pledge Amount** but only requested people to pledge via a monthly or weekly payment amount, the system does not calculate out the overall **Pledge Amount,** when you enter in the **Payment Amount.** We've requested for ParishSOFT to put in this enhancement as we believe that is more common in parishes throughout the US.*

*Note: In the **Send Statements** area, the family will need to have the boxes checked if you wish to send them a statement from the parish. Unless requested by the pledging family, keep the statements defaulted to all selected. Make sure each month has a check next to it. Whenever printing reports, if the boxes haven't been checked, the families will not appear on the report. (No statements will be sent out automatically, you have to run the statements and send it to these families)*

Statement Months - Select All - Clear All
Select each month a statement should be sent
☑ January ☑ April ☑ July ☑ October
☑ February ☑ May ☑ August ☑ November
☑ March ☑ June ☑ September ☑ December

18) After you're finished entering the last family, on the **Pledge Family Search**
screen, click the **Close** button indicated below. You will then be back on the
main **Pledge Management** screen.

Pledge Family Search

Pledge List Filters

Organization	Fund	Family Status	Family Group
Good Shepherd Parish, Lima	1131-10 Building Fund	Registered	Active

10 records ⌄   Add Pledge

	Env #	Last Name	First Name	Phone	Family DUID	# Pledges
		smith ✕				
○	855	Smith	Dave and Nancy	555-2222	290165	0
○		Smith	Igo		537772	0
○	5465	Smith	Jeanne	555-2222	291245	0
○		Smith	John and Jane		289975	0
○	5275	Smith	John and Linda	555-2222	291199	0
○		Smith	John and Suzanne	555-2222	293303	0
○	3593	Smith	Larry and Debby	555-2222	292234	0
○	421	Smith	Mike and Patty	555-2222	290080	0
○		Smith	Robert and Mary		289976	0

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Close