

## Offering: Frequently Asked Questions

1. Why did ParishSOFT do this update?
  - a. In the lifecycle of any program updates are necessary. With new technology available today we knew we needed to update the existing program to a new platform to allow us to make many requested changes to the software. This is the beginning of a whole new direction for ParishSOFT Family Suite Products so we can continue to serve the needs of the Catholic market well into the future. With this update we can provide you additional features you have asked for that we could not do before. Below is a link to an article with a list of enhancements we now have because of this change.
    - i. <https://support.parishsoft.com/hc/en-us/articles/360056614792>
2. Can I go back to the old version of Offering?
  - a. This is not an option. You will want to learn how to use the new system and we are sure you will see the benefits it brings. We have created resources to help you learn the product and make the transition smoother:
    - i. <https://www.parishsoft.com/offeringupdate>
3. When I click on Offering nothing happens!
  - a. You will need to enable your popup blocker in your browser. You will find information in this article:
    - i. <https://support.parishsoft.com/hc/en-us/articles/360057599492>
4. Did all my batches/funds/history come over with the update?
  - a. Absolutely, all of your history is still there. You will need to filter the pages to see your history. All page's load blank for performance and you will filter to see what you want to view. Ensure your batches are reviewed and closed to see them reflected in reporting. (See below for more details)
5. Why did my old batches get closed?
  - a. In the Offering & Pledges module, data in uncommitted quick entry batches does not show in reporting, including contributions statements, until a batch is committed. In Isidore Offering all open batches now work the same way. Therefore, it is necessary to close all your batches for them to show in reporting. Please see the article link below for additional information,
    - i. <https://support.parishsoft.com/hc/en-us/articles/360057608192>

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6. How can I run my reports?
    - a. Reports are now listed on the Reports Card or on the left navigation menu under Reports. You have four options: Donor, Analysis, Pledge and Audit reports. Many are new, however in the article linked below you will see the old report name and where it is in the program and if it has a different name. Some reports are generated from the page like Contributions, Pledges and Batches. Below is the link to an article for assistance.
      - i. <https://support.parishsoft.com/hc/en-us/articles/360055456232>
  7. How to create a new batch?
    - a. Creating a new batch is done on the batches page. Simply click one of the links on the bottom of the batches card or click batches in the left bar. Once on the page click the + Icon in the top right to start a new batch. Below is the link to an article for assistance.
      - i. <https://support.parishsoft.com/hc/en-us/articles/360051244932>
  8. How do I post to a new batch?
    - a. Once your batch is created you can click on the posting icon  in the top right of the page.
    - b. If you are posting to an existing open batch, once you filter the batch page, click the posting icon on the batch card.
- NOTE: If you are using a scanner with contribution entry you may need to reprogram the scanner for the new data entry sequence.**
9. How do I post outside a batch?
    - a. To post contributions and pledges without a batch you will need to update your settings first then you will have access to the posting icon. Below is the link to an article for assistance.
      - i. <https://support.parishsoft.com/hc/en-us/articles/360052554251>
  10. How do I post multiple contributions for the same amount to the same donor in one batch?
    - a. If you need to list each gift on a separate line you can enter the donor, save the posting, and add them again just like if it was a new donor. The program does not prevent multiple postings for a donor.

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11. How do I make corrections to closed batches?
- Once a batch is closed it cannot be edited. This is for audit and data integrity purposes. You will need to create a correcting batch. You may do this manually for your more complex changes or use the new automated correction batch routine. Using the automated routine is our recommended best practice. Not only is it a quick way to ensure your corrections are done accurately but it will also ensure they have the same posting date and will not be shown on your giving statements. Below is a link to an article for help.
    - Manual for complicated batch corrections (i.e. multiple donor changes or changes to multiple fund postings): <https://support.parishsoft.com/hc/en-us/articles/360054884291>
    - Automated: <https://support.parishsoft.com/hc/en-us/articles/360056954852>
12. How do I change the default lookup during posting?
- On the posting page you have a default posting options on the right and you can change them as you go.
13. Does the amount have to be entered for each entry?
- Yes, currently that is the process.
14. Is there a quick posting feature?
- There is one posting feature in Isidore Offering, either within a batch or without a batch the routine is the same.
15. How do I import my online giving?
- Importing has two options, Import and Integration. You can import a file from a 3<sup>rd</sup> party vendor or a file you export from ParishSOFT Giving. Below is the link to a few articles for assistance.
    - Creating a file: <https://support.parishsoft.com/hc/en-us/articles/360054000012>
    - 3<sup>rd</sup> party vendor import: <https://support.parishsoft.com/hc/en-us/articles/360057308731>
  - Legacy Online Giving and ParishSOFT Giving will send pledges and contributions directly to the updated Offering module, so the file format for either Online Giving exports is no longer in use. You will now have direct integration with our ParishSOFT Giving and Legacy Online Giving. Below is a link to an article on how to set that up.
    - <https://support.parishsoft.com/hc/en-us/articles/360057862752>

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- c. **For any online giving program, you are using you will first need to update your Fund ID's to the new Fund ID in Isidore Offering. To get a list of New Fund ID see #16.**
16. Will this still integrate with Legacy Online Giving and ParishSOFT giving automatically?
- Yes, see #14 above
17. How do I find the new Fund ID?
- We did have to update many of the ID's from the old version. On the Home page click Go To Funds on the bottom of the funds card or click funds in the left bar. Once on the funds page you can search for your fund. Below is the link to an article for assistance.
    - <https://support.parishsoft.com/hc/en-us/articles/360051019412>
  - Click on your fund name to go into the fund details. Once there you can see the fund ID.
  - If you need a list of all fund ID's once you filter your list for desired funds, click the export icon  in the top right and you will get an excel report to work from.
18. Can I use my Enter key to move between fields?
- Isidore follows Microsoft Windows standards for navigation. You will use your tab key to move between fields. Once you tab to a save, or enter, post button you can use the Enter key to complete the action.
19. How do I run my donor statements?
- Please see the following articles on donor statements:
    - Configure: <https://support.parishsoft.com/hc/en-us/articles/360056200791>
    - Run Statements: <https://support.parishsoft.com/hc/en-us/articles/360056465592>
    - Statement Error Messages: <https://support.parishsoft.com/hc/en-us/articles/360058077871>
    - Single Donor Statement: <https://support.parishsoft.com/hc/en-us/articles/360058296551>
20. Will the envelope number print on statements?
- Currently they do not.
21. Can I search by envelope number to find the family?

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- a. Yes, you can. During the contribution and pledge entry if you set your default to envelope number and on the pledges and contribution pages you can search for envelope number on the right filter area.

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22. How can I sort my batch list alphabetically?

- a. You can change the sort order using the filter section on the right of the page. If you want to sort your contributions or pledge list by name you will want to export the list and you can then sort it in any field using Excel.

For additional assistance please see our other articles in the support helpdesk. You can search for IO to see the full list. We also have a learning path in PATHFinder for all Isidore Offering training. If you need a log in or need assistance with PATHFinder please email

[Trainig@parishsoft.com](mailto:Trainig@parishsoft.com) ..