Set Up Funds and Contributions

Funds

In the Fund Setup window, you can track donations, gifts, pledges, miscellaneous payments, charges, refunds, and more. You can customize funds, create your own groups and names for fund activities, as well as define fund periods and customize recurring charges. For more information, see Notes About Setting Up Funds.

Locating a Fund's Record

In the Fund Setup window, use the arrow buttons on the ribbon to locate funds. You can search for a single record or scroll through each record until you find the one you want. For more information, see Locate a Record.

To view all the records associated with a specific fund or fund period, click **Fund Filter** in the navigation pane. Once you look up a fund, scroll through the records to view all the associated families. The filter you use remains enabled until you click **Fund Filter** again, then **Clear Filter**.

Printing Usage Reports

You can print a usage report to see which families are using which fund activities. These reports contain statistical information that can help you determine if an activity is rarely used or not used at all. In the Fund Setup window, in the navigation pane, click **Usage Reports**.

Contributions

Once you set up funds, you can use the Contributions window to assign funds to families. Families can have funds set up for their particular needs: special rates, fees, or billing periods.

Before you can work in the Contributions window, you must set up a fund for each transaction category. For example, you can set up a fund for building repairs and one for fund-raising events. Within each fund, you can track individual posting activities, such as offerings, Christmas, pledge payments, or service hours.

Finding History Entries

You can search all family records for certain fund history information from the Contributions window. In the navigation pane, click **Find History Entries**. Enter any relevant data for the entries you want, and click **Find Matching Entries**. To view the record associated with an entry, select it in the grid and click **Lookup/OK**.

Related Topics

- Notes About Setting Up Funds
- Add a Fund
- Grant Fund Access in Other PDS Programs
- Set Up a Loose Collection
- Record a Family's Contribution
- Track ISF Checks and Fees
- Track Volunteer Hours
- Refund Money to Parishioners

- Enter a Billing Address
- View Recaps of Fund Activities and Totals
- Consolidate Fund Amounts
- Export Batch Totals
- Transfer Groups and Activities to Another Fund
- Contribution Quick Posting
- Contribution Processes