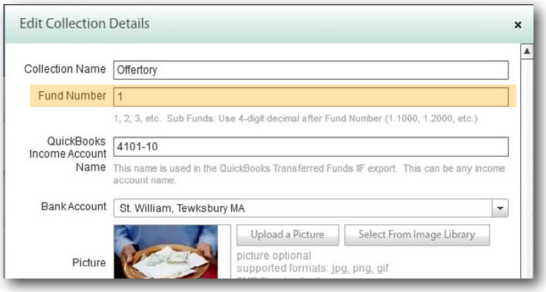
BECAUSE VIBRANT CHURCHES MATTER

PARISHSOFT IMPORT PROCESS

Pre-Import Steps

1 In the WeShare **Control Panel**, click on the **Manage Giving Opportunities** icon and any **Manage Collection** button. Then click the **Collection Details** icon.

2 In the **Fund Number** box, enter the **Parishsoft COA ID** number that corresponds to that collection and click **OK** to save. Repeat this process for each collection.

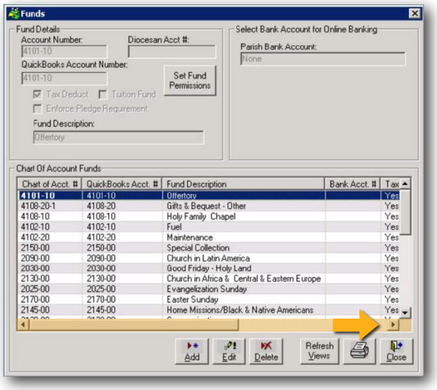


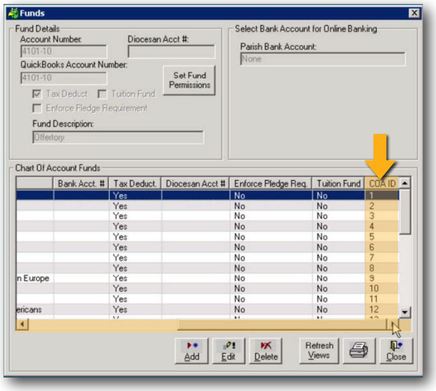
Need help locating the COA ID number in Parishsoft? Please follow the instructions below, otherwise skip to Step 3.

1. Open **Parishsoft** and click the **Offering & Tuition** icon.

2. Once open, click on **Add/Edit/delete Funds**.

3. The **Fund** screen will open. Scroll over to the right until you can see the **COA ID** column and copy the COA numbers for each needed Fund Description.





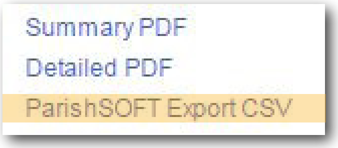
3 In the WeShare **Control Panel**, click on the **Manage Users** icon and then on any individual donor name missing an **Envelope ID** number. Navigate to the **Giving Account Settings** tab.

4 In the WeShare **Envelope ID** field, enter the **Envelope Number** for the parishioner. Repeat this process for every donor.

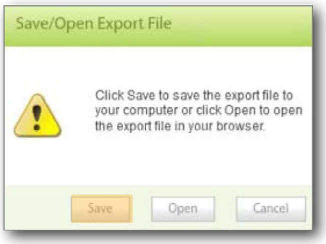
Preparing the WeShare Export File & Importing

1 Go to the WeShare **Control Panel**, click on the **Reports & History** icon. Select from either the **Transfer Reports** (to import each deposit separately) or the **Financial Export** (to import multiple deposits grouped by date range) icon.

2 Choose the report you want to upload into Parishsoft and select the **Parishsoft Export CSV**.



3 You will then be promted to **Save** the file. Save it into a folder on your computer that will be easy for you to find later. Create WeShare folder if needed.

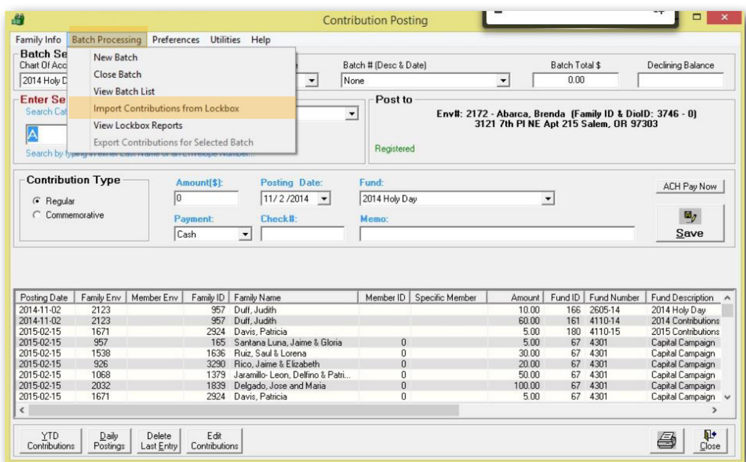


If you have a remote desktop, you will first need to Save the file to your Desktop, then right-click to copy it. Open up Parishsoft Desktop and paste the file into the WeShare folder by keying Ctrl V.

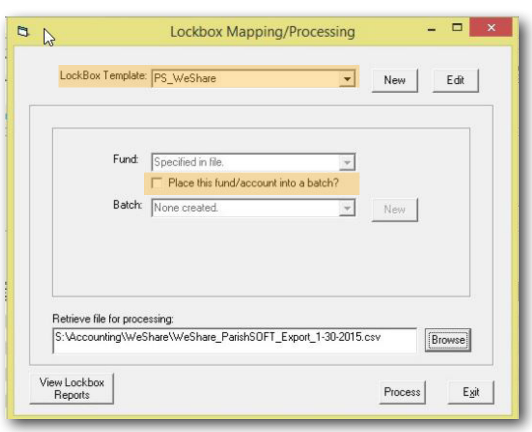
4 Once the file is saved, open **Parishsoft**.

5 Starting from **Offering and Pledges**, click **Post Contributions**.

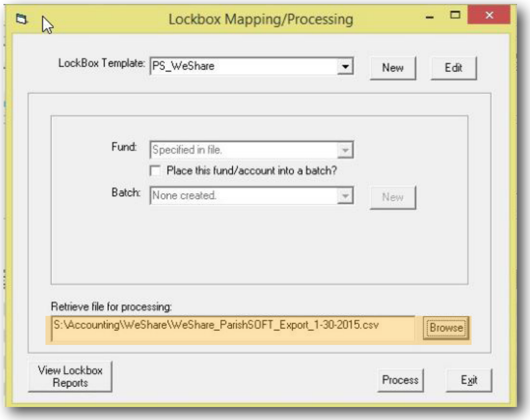
6 Click **Batch Processing**, select **Import Contributions from Lockbox**.



7 When **Lockbox Mapping/Processing** opens, click on the down arrow and choose **PS_WeShare**. Check the box located under Fund to '**Place this fund/account into a batch**'.



8 Retrieve file for processing by selecting **Browse**. Navigate to the folder where you previously saved the **Parishsoft Export CSV** file and click to open it.



9 Click **Process**, once complete you should receive a message. Click **View Lockbox Reports** to view what was imported.