

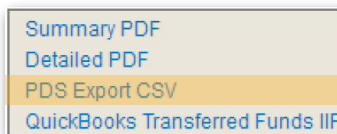
PDS IMPORT PROCESS

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 **PDS - Fund Number** box, enter the PDS fund number that corresponds to that collection. In the **PDS - Activity Name** box, enter the PDS activity name exactly as it appears in PDS and click **OK** to save. Repeat this process for each collection.
- 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 PDS and select the **PDS Export CSV**.



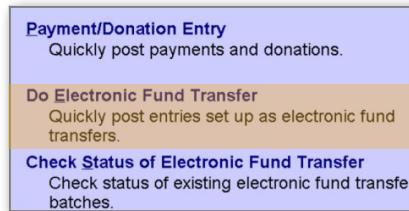
- 3 You will then be prompted to **Save** the file. Save it into a folder on your computer that will be easy for you to find later. Create WeShare folder if needed.



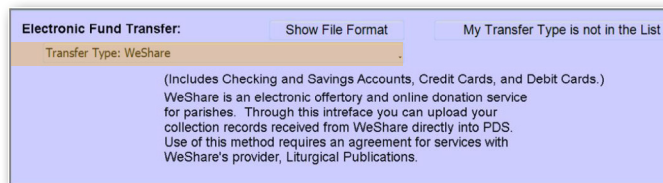
- 4 Once the file is saved, open **PDS**. Click on the **Information tab** and select the **Contributions** icon.



- 5 On the left hand column, click **Quick Posting**. Then select **Do Electronic Funds Transfer**.



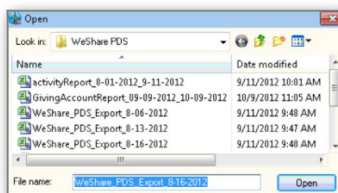
- 6 Click on the **Transfer Type** box and select **WeShare** from the drop down list. If WeShare does not appear in the list, you may need to update your PDS program.



- 7 On the right of the **File Name** box, click on the **Folder** icon.



- 8 Navigate to the folder where you previously saved the **PDS Export CSV** file and click to open it. Then click **Next** to import the file. (Note: If you have PDS on Demand and are unable to locate the file, please contact PDS for support.)



- 9 You will now see the details of your import. Click **Process** to post the import to PDS.

