FAQ by Pledge Masters

What if I made an error after entering contribution information for someone and discover it after the deposit has been made?

Before correcting the error, you will need to delete the deposit record. Don't worry, it will not delete your contribution list. Once you delete the deposit record , a screen will appear that has the list of the contributions for that date. Find the contribution that you want to correct, highlight it, and click on 'edit'. Make the change, and then save. Click on 'Close All' and when it asks you if you want to deposit the contributions, click on 'yes'. It will take you to the deposit screen where you click on 'add' and then click on 'save'.

What if I make an error while entering the contribution data?

If you realize that you have made an error in one of the contributions, on the next contribution you enter, rather that clicking on "save and continue" at the bottom, click on "save" in the top tool bar. This will bring you to the list of contributions entered thus far. Highlight the deposit you want to edit, click on "edit", make the correction, and click on "save". You can then continue entering contributions.

What if I have a check, but the person's name does not come up on the list when I enter it in the box?

They may be a new contributor. You will need to add them to the list. Click on 'member' on the left list. Decide whether it is an individual, family, or organization, and click on the appropriate box. When the new screen opens, click on 'add' at the top of the page. This will open a screen where you can enter the name and address. **Please enter the name in capital letters**. Once you have entered the necessary information, click on 'save'. To return to contributions, click on 'financial' and then click on 'contribution'. This will bring you back to the screen where you can type in the contributor's name.

What if I have a check, but don't know what fund to put it in?

If the Rector is available ask him/her. If there is no one to ask, use your best judgment and provide the details of what it was and who it was from in the e-mail you send with the deposit details.

What if I am entering the checks on a date after the Sunday when they came in? Should I change the contribution date to match the correct Sunday?

Yes. On the contribution entry page, you will see a calendar which allows you to change the contribution date. When saving the deposit, you will also have the option to change the contribution date.

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