

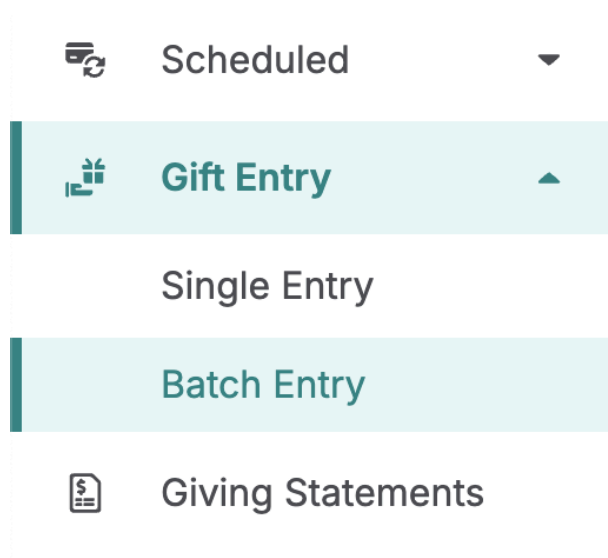
Strategy Guide: Gift Entry Best Practice

As a ParishStaq admin, the process to ensure all Gifts and Transactions are seen properly in both Giving and ChMS (Church Management Software) includes steps in both areas of the software, depending on how the gift was received.

Note: You must have both Giving and ChMS Financial Permissions to complete all the steps

Processing Cash and Checks: Log Into Giving

From the left-hand-navigation, select *Gift Entry*, then *Batch Entry*.



Follow the steps in the Help Center article, [How to Use Batch Entry](#) to create a Batch. We suggest using a consistent naming convention, including the date of the batch, for easy tracking and searching. **All cash and checks are entered in Giving whether they are for Donations or Payments (such as Religious Education Fees)**, just remember to select your regular listing, the one with your church name, for all *gifts*. If someone is *paying* for something, such as Faith Formation, a book, etc. those will need to be created under the “Payment”/“Pay” Listing. *Selecting the correct Listing is vital for reporting purposes.*

Note: You do not need to batch any Online Transactions in the Giving software.

Once all the checks and cash for a Batch have been entered, mark the batch as **Completed**. Those checks and cash can be taken to the bank. If any of the checks do not clear, you can open the Batch again and make any adjustments. Once you know that all the checks have

cleared, you can mark the batch as **Deposited**. It is recommended to wait a week before marking it as Deposited.

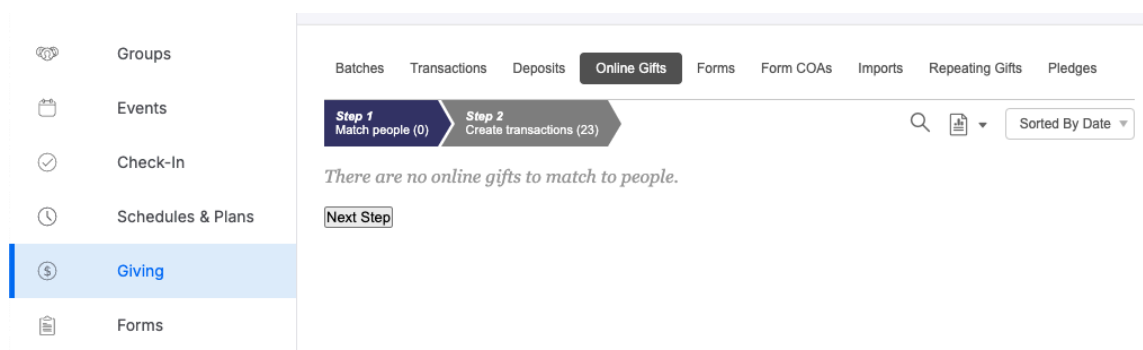
Note: Once the Batch is marked Deposited, it will sync to ChMS as a Closed Batch and the Transactions will be visible on the parishioners Profiles in ChMS. A Deposited batch *cannot* be reopened.

Processing Online Gifts: Log Into **ChMS**

Tip: Use the [Product Switcher](#) to switch over to ChMS.

When someone Gives via the Online Giving Link, those Gifts show in ChMS under the Online Gifts Tab. The Transactions need to be Batched to show up on any Report in ChMS and display accurately on the parishioner Profile. [How to Process Online Gifts](#) shows how to complete that task properly.

From the left-hand-navigation, select *Giving*, select *Online Gifts*, then *Step 2*.



Select All Transactions, then click *Create # Transactions* button at the bottom of the screen, below the list of transactions

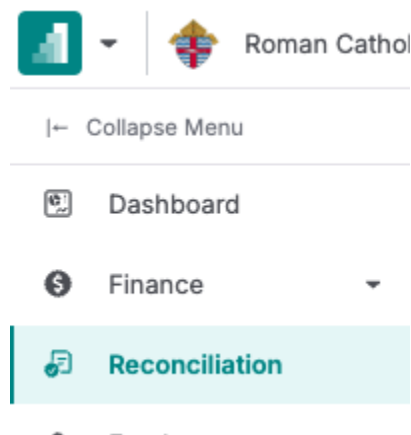
This pop-up will open:

We suggest using a consistent naming convention for the Batch Name, including the date of the batch, for easy tracking and searching. After entering the Batch Name, click Create Transactions.

Reconciliation of Online Gifts: Log Into **Giving**

When you receive your Bank Statement, you will want to reconcile all deposits in your bank account.

From the left-hand-navigation, select Reconciliation:



Follow the steps in the Help Center Article [Learning about Reconciliation](#) to reconcile the deposits into your bank account from each source

Quick Overview:

	Cash/Check	Online Giving
Giving	Batch Entry	Reconciliation
ChMS	No Action Needed	Processing Online Gifts

FAQ:

What If I need to edit a Transaction in a Deposited Batch?

The Transaction(s) will need to be edited individually in both areas, as described in these two articles [Giving](#) and [ChMS](#)

How do I search for a Deposited Cash/Check Batch in ChMS?

All Batches sync over to ChMS as Closed Batches. You will need to [Search for the Batch](#) to see it in the list. (From the left-hand-navigation, select *Giving*, click *Batches*)