How to Allocate Funds

Introduction

This guide explains how to organize and allocate your church's funds in MortarStone. You will learn how to create fund categories, assign funds to them, and set default funds for easy tracking and reporting.

Prerequisites

- A list of your church's funds, including which funds accept general tithes and offerings

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Step-by-Step Instructions

1. Access Fund Categories

1. Log in to your MortarStone account.
2. Click **Settings** in the left-hand navigation menu.
3. Select **Fund Categories**.

2. Identify General Funds

1. Locate the **General** category.

💡**Tip:** The General category is a group of funds stored within MortarStone and does not sync to your Church Management System. Most churches include their main tithes and offerings funds under General.

3. Mark the Default Fund Category

1. Ensure the **General** category is marked **Yes** for **Default Fund Group**.
   - This tells MortarStone to display these funds throughout the software by default.

Fund Categories

NAME	DEFAULT FUND GROUP?
2020 Christmas Offering	No
Camp	No
Children's Ministry	No
General	Yes

4. Use the Unassigned Category as a Holding Area

1. Place all new or uncategorized funds in the **Unassigned** category temporarily.

💡**Tip:** The Unassigned category acts as a holding area until you can allocate funds to specific categories.

How to Create a New Fund Category

1. Click the **Add Fund Category** button.
2. Enter a descriptive name for the new category (e.g., *Missions*, *Youth Programs*).
3. **Move fund(s) into the new category**
    1. Scroll to the **Associated Funds** section.
    2. Select the checkbox next to the fund(s) you want to move.
    3. Click the **Create Fund Category** button.
        - The selected fund(s) will now be part of the new category.

Need Help?

If you have any questions, contact support@mortarstone.com.