Manage Records for Diocesan Offices, Departments, and Organizations

The Diocesan Offices, Depts, & Orgs window displays the records of the offices charged with maintenance of your facilities, stewardship, and personnel, as well as a variety of official organizations, councils, and foundations within the diocese.

Adding a Diocesan Office, Dept, or Org

1. On the Diocese tab, click **Diocesan Offices, Depts, & Orgs**.
2. At the top, click **Add Office**. The Primary Information window displays.
3. Enter the Office/Dept Name and Office/Dept ID.

   > **Useful Information**
   >
   > For your convenience, you can configure DioOffice to assign ID numbers automatically. For more information, see Set ID Number Options.

4. Enter details using the fields and buttons described in the Additional Fields panel below.
5. Click **Save**.

Adding and Viewing Documents

In several of these windows, you can add and view additional documents that support the information you entered. For more, see Add and View Documents.

Finding Fund History Entries

You can search all Diocesan Offices/Depts/Orgs records for certain fund history information. From any Office/Dept/Org financial window, click **Find History Entries** in the navigation pane. Enter any relevant data for the entries you want, and click **Find Matching Entries**. To view the record associated with an entry, select it in the grid and click **Lookup/OK**.

Additional Field Information

Mailing Address
If the institution doesn't have a mailing address different from the street address, you can leave this field empty.

Personnel/Individuals
Click **Add Assignment/Affiliation** to insert a person with a position or role at the office/department. Use the tabs to view information about the selected person. Click **Load Personnel** to view the personnel record.

Directory Information
Enter information such as the mission statement and founding date for an institution. You also have the option for the information to display in the printed directory.

Documents
Enter the location (file name) where a file is saved on your computer. Click **View Document** to open the file with the default program set for your computer.

> **Note**
>
> This does not save the document in the program; it only opens the document from the location on your computer. If you delete the file from the location you enter, it does not display in the program.

History Log
Displays a grid where you can record the date and description of significant historical events with an institution. For more, see Manage an Institution's History Log.

Letters, Etc.
Displays a grid where you can keep track of multiple forms of incoming and outgoing correspondence for an individual. For more, see Track Interactions With People.

Rates/History/Keywds
Manage funds in this window. For more information, see Manage Development Funds.

Recap/Totals
View the totals paid to fund activities and totals and balances due for charges. For more, see View Recaps of Fund Activities and Totals.

Billing Address
Displays the billing address for the institution associated with a particular fund. For more, see Edit a Billing Address.

Individual Letter, Label
Access a report wizard with the option to create a custom label, envelope, or letter report. For more, see Address and Send a Letter.

Related Topics

Manage an Institution's History Log
Manage Records for Groups and Businesses
Parishes and Facilities
Manage Development Funds