

## January Extended Hours (Eastern)

Monday - Thursday 9 am - 7 pm  
Friday - 9 am - 5 pm  
Saturday - 11 am - 2 pm

## Regular Hours (Eastern)

Monday - Friday 9 am - 5 pm

## Support & Office Closed

Thanksgiving - November 23rd & 24th  
Christmas - December 25th  
New Years - January 1st

Although, there is no end of year process in Donations, there are several options available to you at any time during the year. For example, you may stop the use of Giver #s, reassign Giver #s, print labels for Giver #s, start a new Pledge Campaign and enter PrePaid Pledges.

The use of Giver #s is optional in Donations. Giving is attributed to the name of the giver, so Giver #s are used mostly for the ease in entering donations and as a way of assigning people boxes of donation envelopes. Giver #s can carry forward year after year without change or may be re-assigned or changed in a new calendar or fiscal year and reports can be run for any campaign even if Giver #s are changed.

Pledge campaigns may begin at any point throughout the year because there is no end-of year procedure.

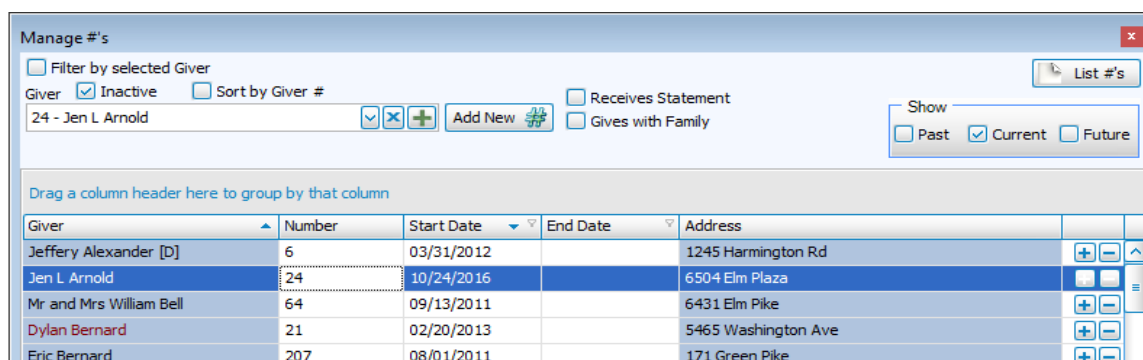
Before you make any changes to the Giver #s, make a Backup.

## 1. Stop the use of Giver #s

You can stop the use of Giver #s for people not needing them (perhaps they passed away, moved away or left the church). Inactive persons appear in red and their Giver #s need to be ended. Use the *Manage #s* function to accomplish this.

- Go to *Donations>Givers>Manage #s*.
- Find the giver who does not need a Giver # and fill in their End Date. To show inactive people, be sure to check the Inactive checkbox.
- Do this for each person who no longer needs a Giver #.

**NOTE:** Ending Giver #s can also be accomplished in Auto Assign. Ending Giver #s for those who will not be assigned a Giver # in the next year is VERY important if you wish to avoid conflicts in assigning new numbers for the new year.



Manage #s

☐ Filter by selected Giver

Giver ☒ Inactive ☐ Sort by Giver #

24 - Jen L. Arnold    Add New

☐ Receives Statement ☐ Gives with Family

Show ☐ Past ☒ Current ☐ Future

Drag a column header here to group by that column

Giver	Number	Start Date	End Date	Address
Jeffery Alexander [D]	6	03/31/2012		1245 Harmington Rd
Jen L. Arnold	24	10/24/2016		6504 Elm Plaza
Mr and Mrs William Bell	64	09/13/2011		6431 Elm Pike
Dylan Bernard	21	02/20/2013		5465 Washington Ave
Eric Bernard	207	08/01/2011		171 Green Pike

## 2. Reassign Giver #s (assigning Giver #s one by one)

If you typically reassign Giver #s for a new year, we recommend that you end the existing number to preserve the history of the old number (for example, it matches previously published reports) and assign a new number to the giver to use.

- In *Donations>Givers>Manage #s>* use the search box at the top left at Giver.
- Find the giver who needs the new Giver # for the new year and click to *select* their name.
- Click the *Add New #* button.
- Assign the new number and type a start date for that number to become effective.

If you enter the Giver # for a future date, when you click *OK*, you will NOT see the new number assigned to this giver. Go to the top right of the screen and click both *Current* and *Future* under *Show*. This procedure will assign an *End Date* one day prior to the *Start Date* for the old Giver #.

## 3. Auto Assign # (assigning multiple Giver #s)

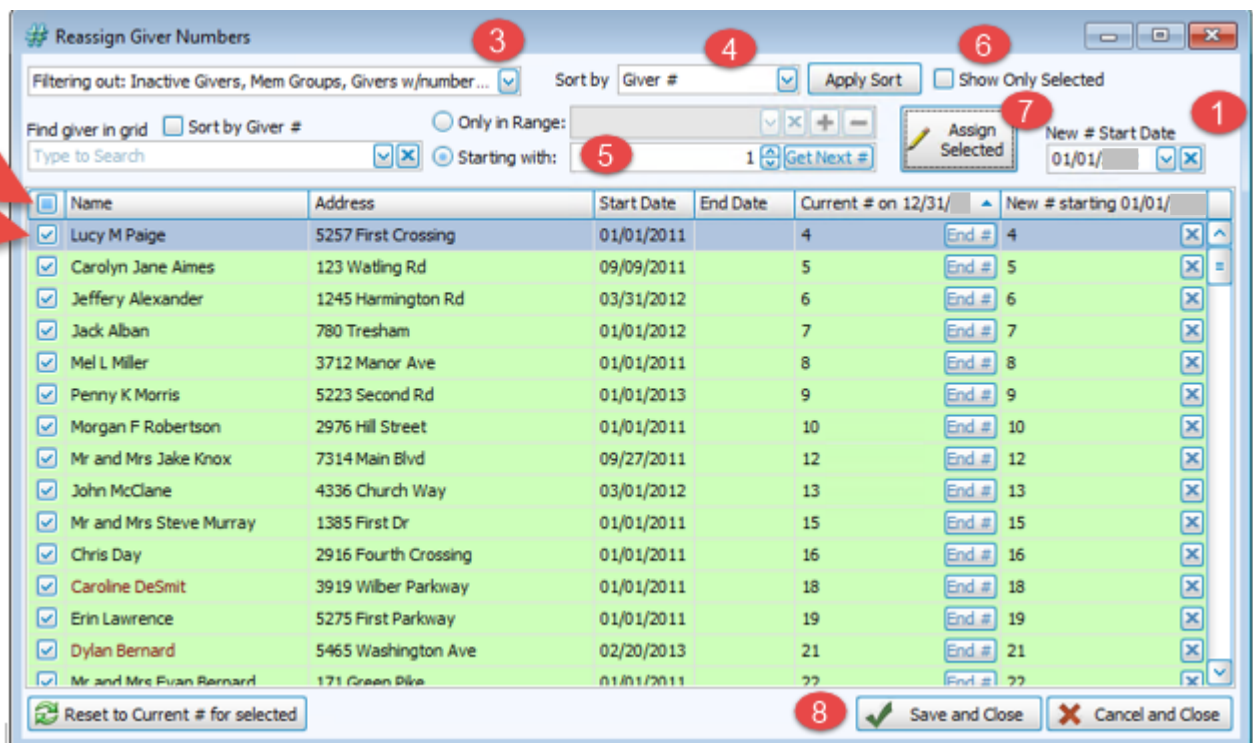
The *Auto Assign #* function is best used when you want to change the Giver #s for a lot of people as of a certain date. Rather than assigning the numbers one by one on the *Manage #s* screen, you can change the numbers for a lot of people all at once.

- Click *Givers>Auto Assign #*
- The box to the right appears stating you have exclusive access to the *Auto Assign* and *Manage Giver #* screens. Click *OK*.

While this screen is open you will have exclusive access to Auto Assign and Manage Giver #.

No one else will be able to use these functions while this screen is open.

OK



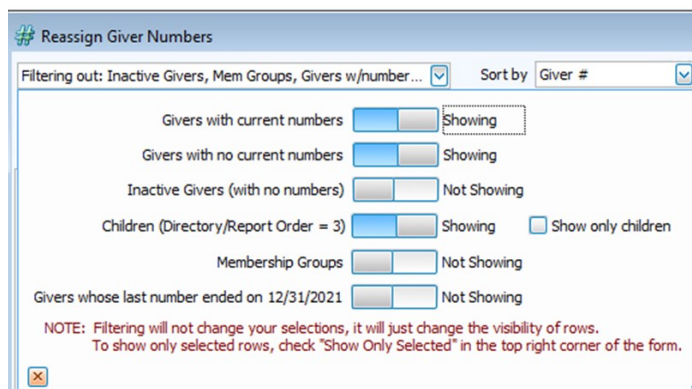
The screenshot shows the 'Reassign Giver Numbers' window. It features a table with columns: Name, Address, Start Date, End Date, Current # on 12/31/, and New # starting 01/01/. The table lists several givers, including Lucy M Paige, Carolyn Jane Aimes, Jeffery Alexander, Jack Alban, Mel L Miller, Penny K Morris, Morgan F Robertson, Mr and Mrs Jake Knox, John McCane, Mr and Mrs Steve Murray, Chris Day, Caroline DeSmit, Erin Lawrence, Dylan Bernard, and Mr and Mrs Evan Bernard. The window includes a search bar, a 'Sort by' dropdown, and an 'Apply Sort' button. A 'Find giver in grid' section has a 'Type to Search' field and a 'Sort by Giver #' dropdown. A 'Starting with' field is also present. A 'Get Next #' button is located next to the 'Starting with' field. A 'Show Only Selected' checkbox is in the top right. A 'Reset to Current # for selected' button is at the bottom left. A 'Save and Close' button with a green checkmark and a 'Cancel and Close' button with a red X are at the bottom right. Red callout numbers 1 through 8 point to various elements: 1 points to the 'New # Start Date' field, 2 points to the search bar, 3 points to the 'Filtering out' dropdown, 4 points to the 'Sort by' dropdown, 5 points to the 'Starting with' field, 6 points to the 'Apply Sort' button, 7 points to the 'Assign Selected' button, and 8 points to the 'Save and Close' button.

1. The *Reassign Giver Numbers* screen will default to a *New # Start Date* of January 1st of the next year; you may change this date if necessary.
2. By default, all currently assigned numbers will be selected. Givers can be deselected by unchecking the *box* in the column to the left of their name. You can deselect all by clicking in the *checkbox* in the column heading.
3. To remove a current number off of a Giver, click *End #*, click *OK* to confirm the date of removal.

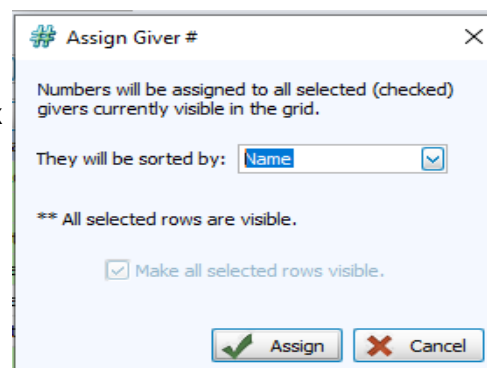
**NOTE:** The selected individuals are highlighted in green.

3. To change the default selections and review the selected people, use the *Filtering out* drop down to show or not show based on predefined filters.

- The filters adjust who is shown in the list, you will not lose any selections you have already made.



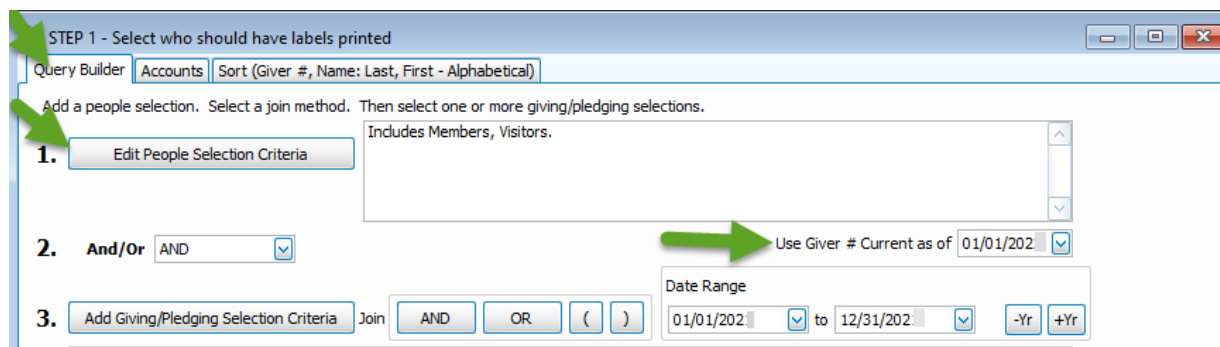
4. Set the order for your reassigned givers using the *Sort by* selection and click *Apply Sort*.
5. The *Assign #s Starting with* box defaults to *Giver #1*, but you may start with any number you choose
6. Once the list is in the preferred order, click the *Show Only Selected* box to complete a final review.
7. Click *Assign Selected* tab.
- You may choose the order numbers will be assigned. If there are any conflicts, those lines will appear in red and can be deleted or changed individually. Click *Assign*.



8. Click *Save and Close* to save the new *Giver #s* or *Cancel and Close* to cancel to NOT save your new *Giver #s*.

## Create Labels with Giver #s

*Donations>Report/Export>Lists & Labels>Labels> Step 1*



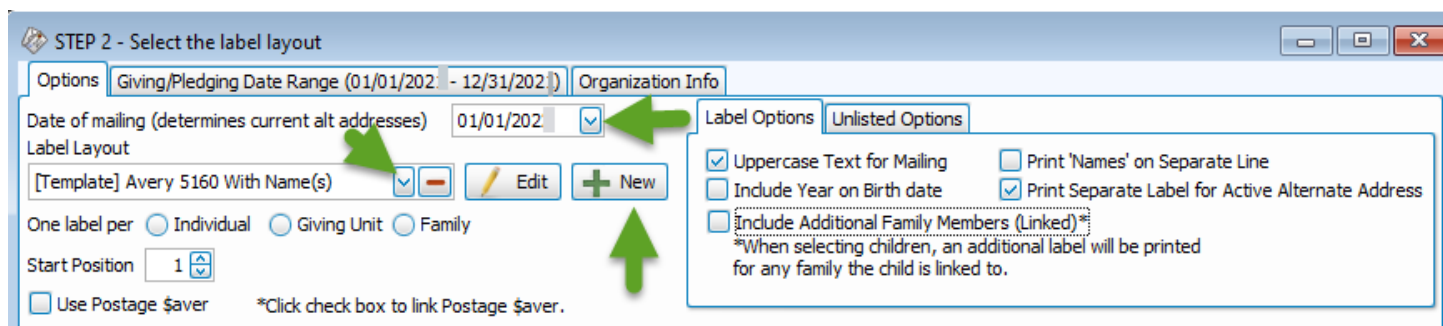
## STEP 1

On the *Query Builder* tab, if you are creating labels for the new year 'Use #s current as of' and enter the Start Date of new Giver #s.

- ◇ Click 1. *Edit People Selection Criteria* tab, uncheck *Include those without #* and you may fill in *Giver # Range*. Click OK.

- On the *Sort* tab, sort by *Giver #* or *Name*. Click *Next*.

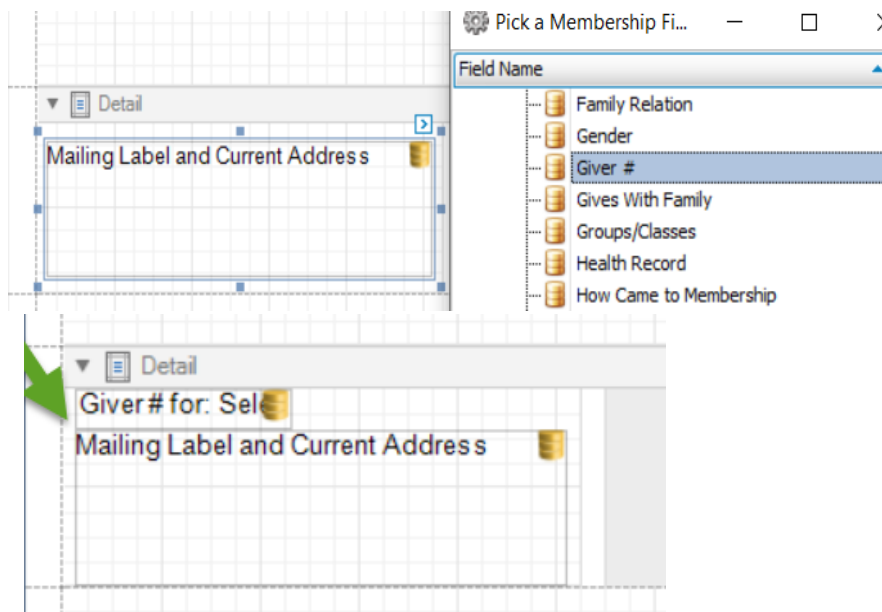
## STEP 2



On the *Options* Tab, change the *Date of Mailing* to 01/01/202X because of the Alt Addresses. A *New* label may need created to include a *Giver #* or choose that existing label from the drop down list.

- ◇ To create a *New Label*, click *New* and choose the *Label Product* and *Product Number*, click *Finish*.

- ◇ On the *Report Designer*, format the label to include the *Giver #*, by double clicking on *Membership Field* on the right side of the screen. The *Pick a Membership Field* screen opens, scroll down to *Giver #* and double click on it. *Giver #* will be placed at the top of the *Mailing Label and Current Address Label* and may turn it pink, adjust the label by *Mailing Label and Current Address*, then using the keyboard to move it down (the pink will disappear).



- ◇ Align the fields.



- Use *Save As* (top left of the screen), this will save your labels to be used again. Enter a name for your Layout: such as **Avery 5160 Giver # Labels**, click *OK* and close this screen.
- On the *Options* tab, under *One label per* choose *Giving Unit*.
- Click on *Print Labels*.

## Starting a New Campaign

You may begin a new pledge campaign or pledge at any time. Because there is no end-of-year procedure in Donations, to begin a campaign or pledge, simply *Copy* a campaign forward or *Start* a new one.

### 1. Copy a campaign

- *Donations>Accounts & Pledges>Pledges*
- At the *Campaign/Pledges* tab, click the down-arrow at *Campaign* and select the *Campaign* you wish to copy
- Click the *Copy Campaign* button
- The copy Campaign box opens, enter the *New Campaign Name*
  - ◊ If you wish to use the same name for the campaign, distinguish it from the prior campaign by including the new year in the campaign name.
- Set the *Start Date* and the *End Date* for the new campaign.
- Click *OK*.
- The information from the old campaign carries forward, including all the people who pledged to the prior campaign and their pledge to that campaign. You may edit as needed.
- Under *Account* verify the *Giving Account* name or you may wish to change it.
- Set a new *default Amount* and *Frequency* if you use those.
- Edit the list of those pledging. Edit a person or group's pledge amount and frequency; remove (-) those who did not pledge to the new campaign. You may add those who are new to the campaign. Givers in red indicate Inactives.

### 2. Start a new campaign

- *Donations>Accounts & Pledges>Pledges*
- At the *Campaign/Pledges* tab, click the *Plus (+) sign* at the *Campaign* box and Enter a new *Campaign Name* (you may want to include the year in the campaign name).
- Select the *Account* for the campaign. If you need to add an account, click the *Plus (+) sign* at the *Account* box and Add *Giving Account*.
- Set the *Start* and *End Dates*. If you wish, you can also set a default *Amount* and default *Frequency*.
- Click *Add Givers* to begin adding the names of givers and their pledges.

## Handling PrePaid Pledges

Churches run stewardship campaigns and accept pledges from donors, which makes it possible for the church financial officers to develop a budget. Often, when a donor submits the commitment card, they may also make a donation to that pledge. It is money received in the current tax year, but it is intended to count toward the campaign for the new year. When a donation is received before the campaign actually begins, that donation is considered a prepaid donation.

### In Donations

You do not need a special donations giving account for prepaid gifts. When you set up a campaign or pledge, for the new year, the system knows that money coming into that pledge prior to the start of it will be considered *Prepaid money*. That money will show on the Giving Statement as **Prior Giving**. As an example: if someone

pledges \$2000 to the new year campaign and prepays \$500 in the previous calendar year, the system will know that as of the start of the campaign, the person has *pledged \$2000, prepaid \$500 and still owes \$1500*. The system also knows that money coming into that account after the start of the pledge is regular income and goes into the #4 income account you selected.

## In Accounting

Prepaid pledge monies can be deposited into a #2 liability account so they are not entered as income for the year in which they were received. That money carries forward in the liability to the new year and then is journal entried out to the appropriate income account once you have moved into the new year.

- After creating the #2 liability account, link the donations account to the liability.
  - ◊ *Accounting>Transactions>Transfer Donations>Default Account Links* tab. Alternately, you can click *Special Functions>Link Donations*.
- The giving account in Donations will show. Click to link it to a Debit Account - a #1 Asset account your checking account, a Credit Account - a #4 Income account, a #2 Liability account, or a #5 Expense account, and to a Prepaid Credit Account - a #2 Liability account.
- In the new year, create a Journal Entry to move the prepaid pledges from the liability to the income account. Debit the #2 Prepaid Liability and Credit the #4 Pledge Income account.

## In Donations

- Enter the person's pledge in Donations. ***\*\*Please Note: Pledges must be entered first!***
  - ◊ *Donations>Accounts & Pledges>Pledges*
  - ◊ At the *Campaign/Pledges* tab, click the down-arrow at *Campaign* and *select the Campaign* the donor is pledging to.
  - ◊ Find the *Giver's name* or *Giver #*, enter a *Pledge Amount*, designate the *Frequency* of the pledge and click *Add Giver to Campaign*.
- Enter a donation in the current calendar year for the prepaid monies.
  - ◊ *Donations>Enter Donations* or
  - ◊ Set the *Date, Giver, Amount, Payment Method, Check or Ref #* if needed.
- Under *Account/Pledge* click to *select the campaign account* for the next year. Because you set up the campaign for the General Fund in the new year, and because the person has a pledge to that specific campaign on his or her pledge record, you can click on the *General Fund 01/01/XXXX -12/31/XXXX*.
- Under *Transfer to Accounting*, the donation will be marked by the system as a **Prepaid Donation** and will automatically be moved into the Prepaid Liability.