Produced by Computer Helper Publishing (CHP). We hope this software makes the tasks of Church administration easier and more efficient. Any questions that cannot be answered by these help files should be directed to the CHP Support Team.

Support Subscribers call **800.533.5227**

Email: support@churchwindows.com

www.churchwindows.com

We always welcome your comments and suggestions (*suggestions@churchwindows.com*). No one knows better what would be helpful. This process is how new releases are designed. We look forward to hearing from you.

Non-support subscribers can call 800.533.5227 for pay-per-minute support,
or email support@churchwindows.com for free inquiries with a 4-day response time.

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Table of Contents

Getting Started in Church Windows

Welcome to Church Windows! This section of the **Help Files** is intended to cover the basics and get you up and running in the software as quickly as possible. As you perform these tasks, you may notice that not everything on all of the screens is discussed. These items are covered in detail within the sections for each specific Module.

Contact Us

Please feel free to contact us if you have any questions. Thank you for selecting Church Windows as your Church data management program. Church Windows is created and supported by Computer Helper Publishing, Inc. where we always welcome your comments and suggestions about Church Windows. No one knows better than you what would be helpful in performing your day-to-day tasks. That is how new releases are designed. We look forward to hearing from you!

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Chapter 1 - Initial Information

Opening Church Windows

Click **Start**, choose **Programs**, **Church Windows**, and **Church Windows**. Or, if you chose to have a shortcut created on your desktop during the Church Windows Installation *(pg 6)*, you could **double-click that shortcut** to open the program if you like.

> ***Note:***
>
> *When you install Church Windows for the first time, no passwords will be active unless you started by **Restoring a Backup** (pg 182). **Users** (pg 189) and passwords can be setup in the **Security** (pg 188) settings.*

The Initial Portal

In Church Windows, the Initial Portal is a quick and easy way to navigate through each of the program's different Modules. When you click one of these icons, another Portal will appear that lists the different areas of that specific Module. Try it in the image of the Initial Portal above to navigate to the help topics for each Module or click a link below:

Membership* — *Scheduler* — *Donations* — *Accounting* — *Administration

---

F.A.Q.

Question — My computers are NOT networked. Can I install **Membership** *(pg 29)* on one computer and **Donations** *(pg 96)* on another?

Answer — Membership and **Donations** data are stored in the SAME data file — they cannot be separated. While we *do not recommend* using the two Modules on two different computers, some Church Windows clients do. If you choose to do this, you must be *extremely careful* with the procedures for **Making a Backup** *(pg 180)* and **Restoring a Backup** *(pg 182)* so that no one's work gets erased. The two computers should have the same data on them all the time (see also **Network Installation** *(pg 14)*).

Question — I'd love to be able to email Church Windows reports to other people. Is there a way I can do that?

Answer — Certainly! Church Windows itself is capable of emailing your reports from the Reports / Directory / Exports screen and/or the **Print Preview** *(pg 20)* screen. The program can also **Export** data files that you could use to build reports in other programs such as spreadsheets or word processors.To export a report to Send via Email, your computer must have a properly configured email client (such as Microsoft Outlook) that successfully sends and receives email *independently* of Church Windows. Additionally, you can send your Donation Statements by email and you can Send Email (such as newsletters) to anyone or everyone with an email address entered in The People File. To enable this kind of emailing, you must first Setup Email.

Question — How often should I backup my Church Windows data?

Answer — Making a Backup *(pg 180)* of your data is never a bad idea. We strongly recommend that you frequently make backups to be sure that your data will not be lost in case of computer crashes, theft, destruction of property, etc. Essentially, every time that you make changes to Church Windows that you would not want to lose, you should make a new backup. That way, if your data is ever lost or corrupted, you always have the option of Restoring a Backup *(pg 182)* to recover your data.

Question — What else is on the Church Windows CD?

Answer — The following folders on the Church Windows CD contain additional information or installations for your use, by clicking on **Browse CD**:

- **Manuals**: Printable versions of these Church Windows **Help** files.
- **Postage $aver**: Installation for the Postage $aver *(pg 202)* program.

> ***Note:***
>
> *Church Windows no longer mails installation CDs to users, instead we now send an email containing a Download Link (pg 7) for each new update (both full versions and service releases). However, if you would strongly prefer to receive CDs in the mail or if you have not been receiving our email updates, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials.. You can check the most current version number of Church Windows on the Download Current Updates page of our website.*

Minimum System Requirements

If your computer does not meet these minimum requirements, we cannot assure the stability of your database. Additionally, the functional speed of the program will likely be prohibitively slow.

- **Processor**: Quad-core or better (**APU processor not supported**)
- **RAM**: 4GB or more
- **Network Connection (if networked):** 100MB or faster wired connection (**wireless networks not supported**)

- **Recommended Operating System (Church Windows version v21 or newer):**
  - 64-bit Operating Systems only
  - Windows® 10
  - Windows® 8 or 8.1
  - Windows® Server 2016
  - Windows® Server 2012 R2
- **Video**: 1280×1024 standard, 1280×720 wide
- **Printer**: Laser or InkJet
- **Disk Space**: 1 GB min, but 15% of total must be free

If you do not see your operating system listed, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials..

> ***Note:***
>
> *Church Windows no longer mails installation CDs to users, instead we now send an email containing a Download Link (pg 7) for each new update (both full versions and service releases). However, if you would strongly prefer to receive CDs in the mail or if you have not been receiving our email updates, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials.. You can check the most current version number of Church Windows on the Download Current Updates page of our website.*

Church Windows Installation

To install Church Windows for the first time (or as an upgrade):

- You can check the most current version number of Church Windows on the Download Current Updates page of our website.

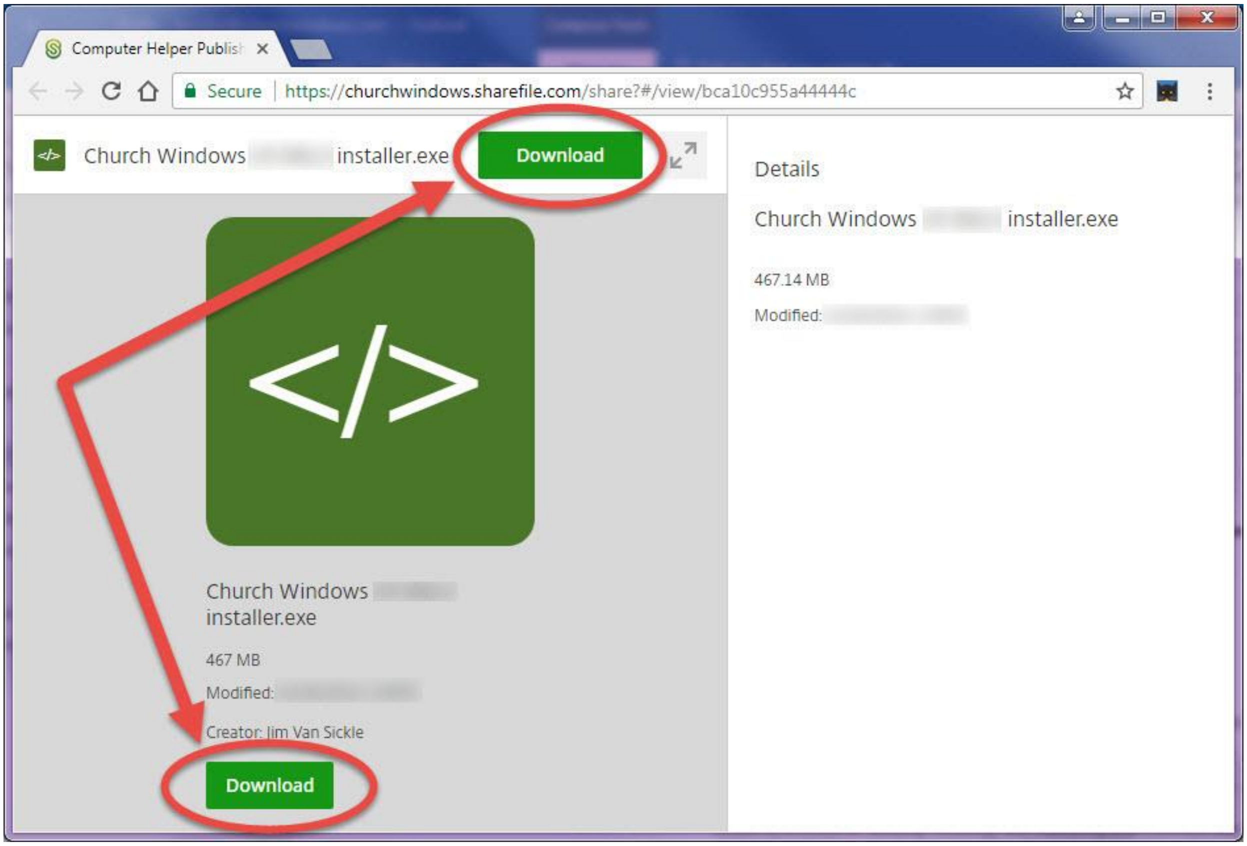
- Be sure that your computer meets the **Minimum System Requirements** *(pg 5)* needed to run Church Windows successfully.
- You must be logged on to your computer with Administrator rights.
- Exit ALL open programs.
- If you are upgrading from a prior version begin by **Making a Backup** *(pg 180)*.
- Then, use either method to open the install wizard:

Download Link

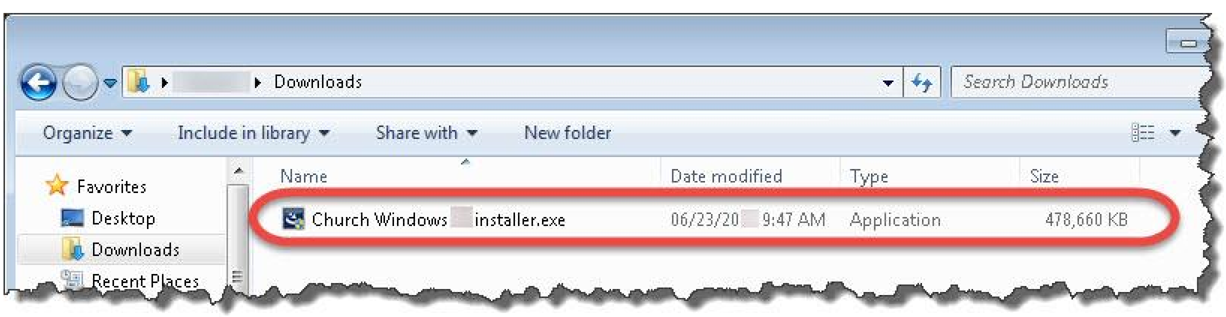
- In the email you received from Church Windows, click **Download**

> ***Note:***
>
> *If you have not been receiving our emails, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials..*

- This will take you to the website where you will download the installer file, click either **Download** button to save the installer file (.EXE file) to your computer:



- Make note of where you save this file on your computer (if you're not sure where the file was saved, try checking in the **Downloads** folder on your computer):



- Double click on the .EXE file that you downloaded to launch the installer.

CD

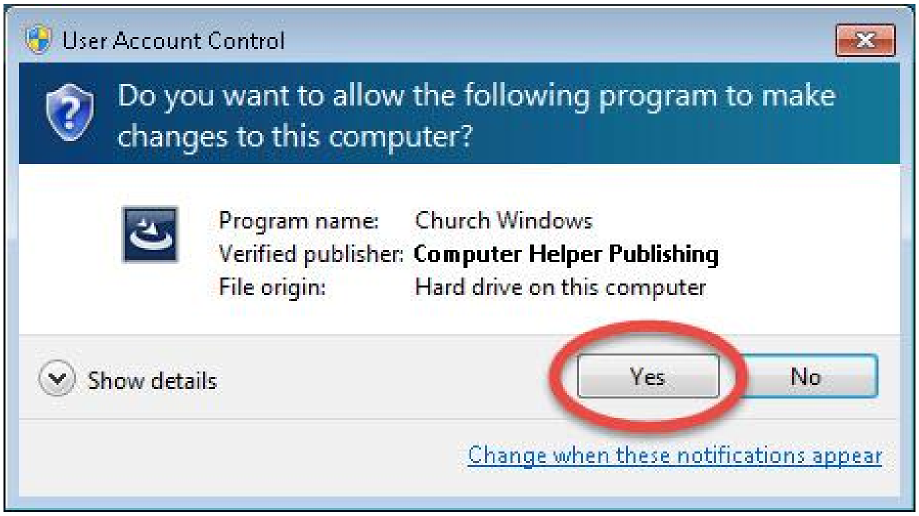
Note:

Church Windows no longer mails installation CDs to users, instead we now send an email containing a Download Link (pg 7) for each new update (both full versions and service releases). However, if you would strongly prefer to receive CDs in the mail or if you have not been receiving our email updates, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials.. You can check the most current version number of Church Windows on the Download Current Updates page of our website.

- Insert the CD into the drive.
- The install program should start automatically.
- If it does not, then click **Start**, choose **Run** (or in the Search bar) type **D:autorun.exe**. Click OK. (This assumes **D:** represents the letter of the CD drive. If your drive is another letter, use it instead of **D**.)

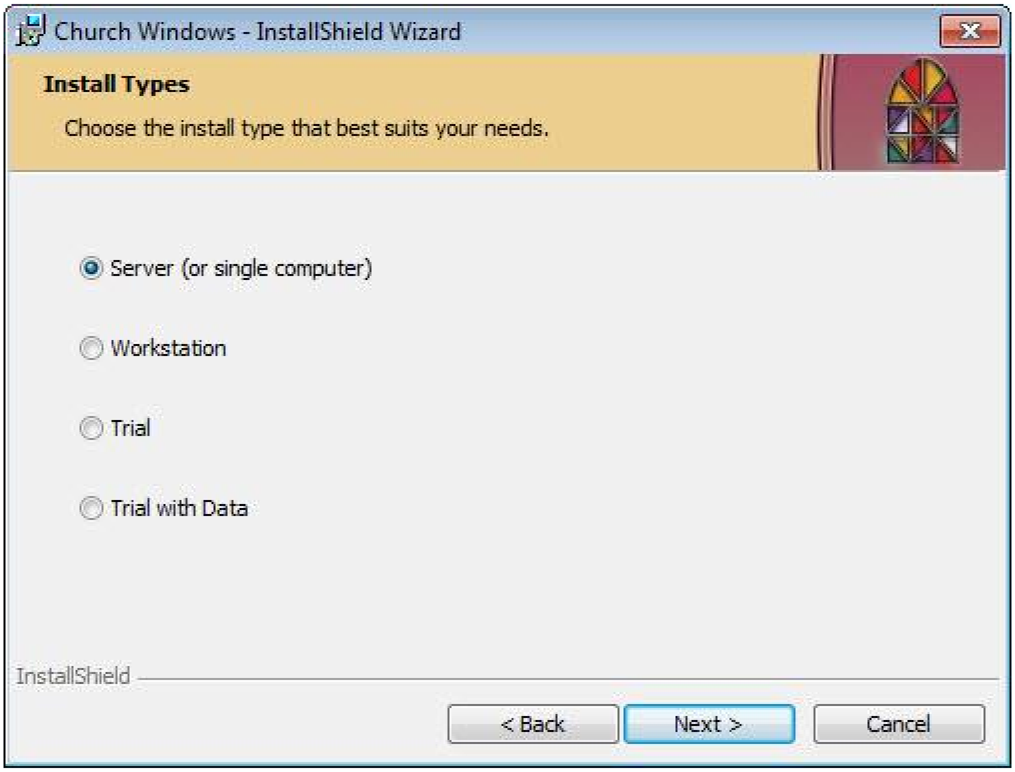
Note:

If your security software displays a message about installing files, you must click on YES or OK to ***allow*** *Church Windows to install / make changes:*



- On the Start screen of the installation program, select **Install Church Windows**
- Then choose **Install a new instance** of this application (or **Upgrade**). Click → Next.

◦ Follow the on-screen instructions choosing one of the following:



1. **Server (Or Single Computer)** — If you are installing on a server (see **Network Installation** *(pg 14)*) or a stand-alonecomputer and you want the data to reside on this computer.

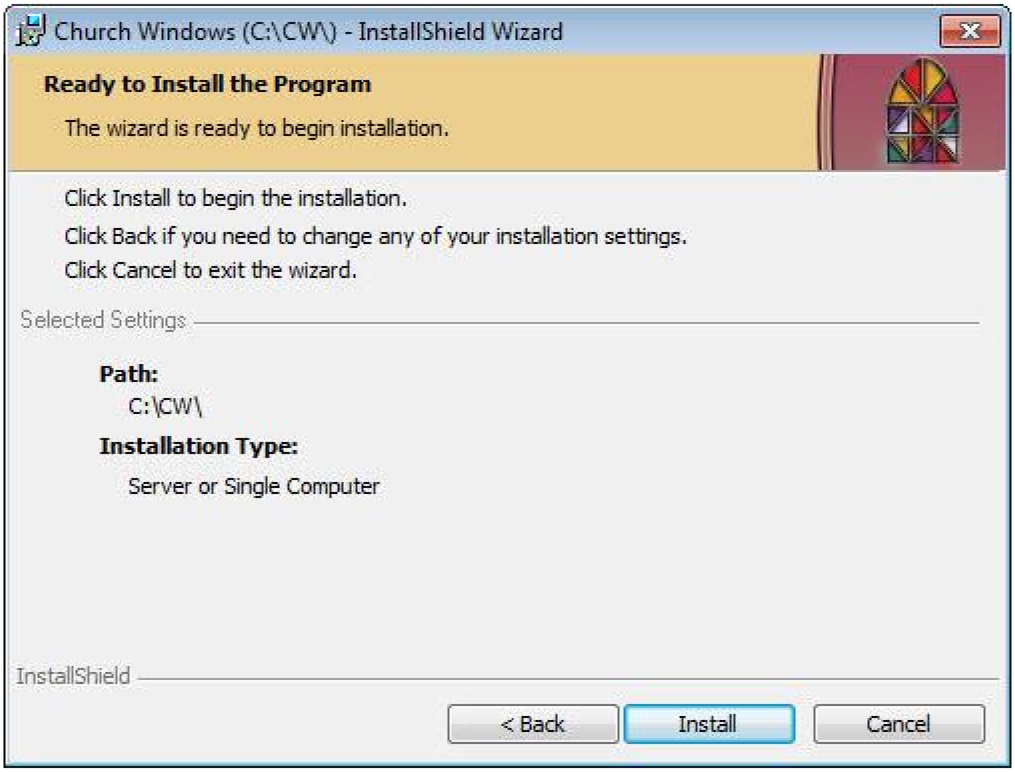
2. **Workstation** — If you are going to connect to a server and do not want the data to reside on this computer (see **Network Installation** *(pg 14)*).

3. **Trial** — Installs an empty restricted trial to enter your own data.

4. **Trial With Data** — Installs with sample data to experiment with the features without having to enter your own data.

◦ It will also ask you where to install the program. It will default to a folder called **CW** on the root of the **C:** drive. This is the preferred location but if there is another drive or folder name you wish to use, you can click on the **Change** button on the right to customize it.

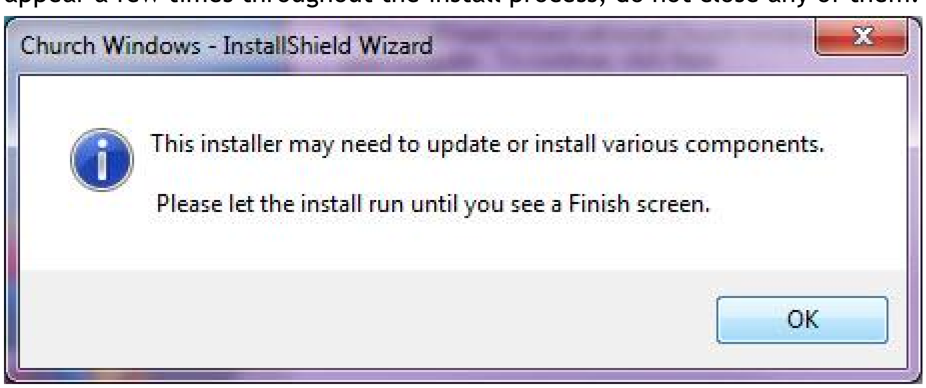
◦ At the final screen before the install starts, you can verify that the correct parameters are selected before starting the install:



- Clicking on the **Install** button will begin the installation.

Important!

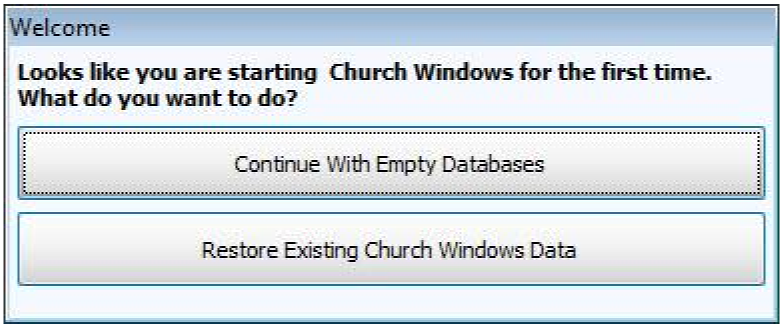
Only click on the **Install** button ONCE, and *please be patient* while the program installs. There are a number of steps it will go through and many screens will appear and disappear a few times throughout the install process, do not close any of them:



- You will know the program has finished installing when you get the screen with a **Finish** button at the bottom:

- When prompted for a " Church Name", type the name of your Church or organization as you would like it to appear at the top of all of your reports. The name can be up to 100 characters. **Use care when entering the name, as it will become hard-coded into your** System Information *(pg 184)*.

When you open the program for the first time, you will be prompted to tell the computer if you are going to start entering data from scratch or use existing data if you have a backup to restore:



Continue With Empty Databases

Will take you to **Opening Church Windows** *(pg 3)* and you will be able to begin entering your Church's data.

Restore Existing Church Windows Data

Will open the Restore screen where you can select the location of the backup you want to restore. For more help on restoring, see **Restoring a Backup** *(pg 182)*.

Network Installation

VERY IMPORTANT!

Wireless networks typically will NOT transfer Church Windows information between computers consistently enough for the Church Windows software to function.

***Any* interruptions or signal degradation *will* cause data loss.**

We can only support **hardwired networks** as a rule since Church Windows requires a constant, uninterrupted, active, and open connection to the databases on the Server.

If you have purchased the network version of Church Windows and will be installing the program on two or more networked computers, either peer-to-peer or client-server:

- Select a computer to be the **Server** or host computer for Church Windows. On this computer, follow the Church Windows Installation *(pg 6)* instructions and choose **Server** for the type of installation.

- Once Church Windows is installed on the **Server**, call the Church Windows technical staff at 800.533.5227 to enable Church Windows' network capability.

> ***Note:***
>
> *There is no need to do this if you will be Restoring a Backup (pg 182) that already has been enabled for networking from another **Server**.*

- Next, have your network technician or some other knowledgeable person share the **CW** folder on the **Server**. Make sure that access to that shared folder is clicked as "**Full Control**" or "**Read/Write**" with **FULL ACCESS** for every user and group available. Write down the name of the **Server** computer so you can find it from the **Work-station**.

- Then, on each **Workstation**:
  - For **Windows 8 or earlier** — open up the **Start** menu, right click on "**My Computer**" or **"Computer"** or **"My PC"**, then left click **Map Network Drive**.
  - For **Windows 10** — open up your **File Explorer** from the taskbar or click the **Start** menu button, select **This PC**, then on the **Computer** tab select **Map network drive.**

- It doesn't matter what drive letter it suggests, it can be any letter to function correctly. Network drive letters usually start from the end of the alphabet and go backwards.

- To the right of the **Folder** field, click the **Browse** button.

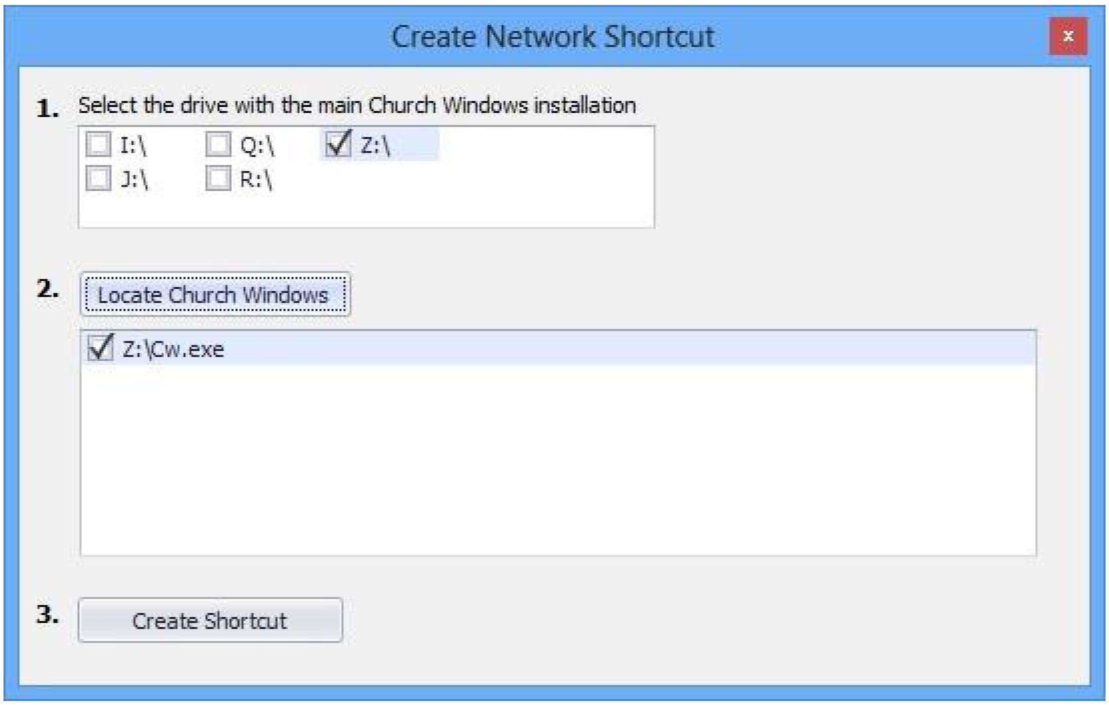
- Expand your network view by clicking on the plus button next to its name. Find the name of the **Server** computer and click the plus next to that name. Left click the Church Windows share (usually the **CW** folder, unless it was renamed during the install) and click **OK**.

- Make sure there is a ☑ checkmark in the **Reconnect at Logon** box and click **Finish**.

- Next, on each **Workstation**, follow the Church Windows Installation *(pg 6)* instructions except select **Workstation** from the install type options. This will install certain necessary files in the Windows\System folder and Common Files folder on each **Workstation**.

> ***Note:***
>
> *The **Workstations** must have the exact same version installed as the **Server**. If service releases have been run on the **Server**, they will also need to be run on the **Workstation**.*

- At the end of the installation, you will see a screen that will create a shortcut if you need to make one. It will find your drives and you can select the mapped drive you created to the **Server** Church Windows install. For this example below, the mapped drive letter is Z:



- Finally, clicking on **Create Shortcut** will put a new shortcut on your desktop for you.

Re-size & Re-position Screens

Many of the screens in Church Windows can be re-sized and re-positioned to your preference. For example, you can re-size and move any screen open and you are able to see the windows side by side or cascading. You can only have certain windows open at any one time within those Modules so there are ways to view or close all windows quickly and easily. Each Church Windows Module also includes a setting to return all of the screens in that Module to the original sizes and positions.

Re-size a screen

- You can click the **Maximize / Minimize** button in the upper right.
    - If you prefer to manually set the size of a screen, do the following:
    - Hover the mouse on one of the edge lines; a double-headed arrow will appear.
    - Holding the left mouse button down, drag the edge line to the right or left to increase or decrease the size of the screen.
- Continue with the other three sides of the screen until you have it at the desired size.

Re-position a screen

- Click the blue bar at the top of the screen.
- Holding the left mouse button down, drag the screen to the desired position on the screen.
- When you open the screen(s) again, it will appear in the size and position you set.

Restore screens to their original size and position

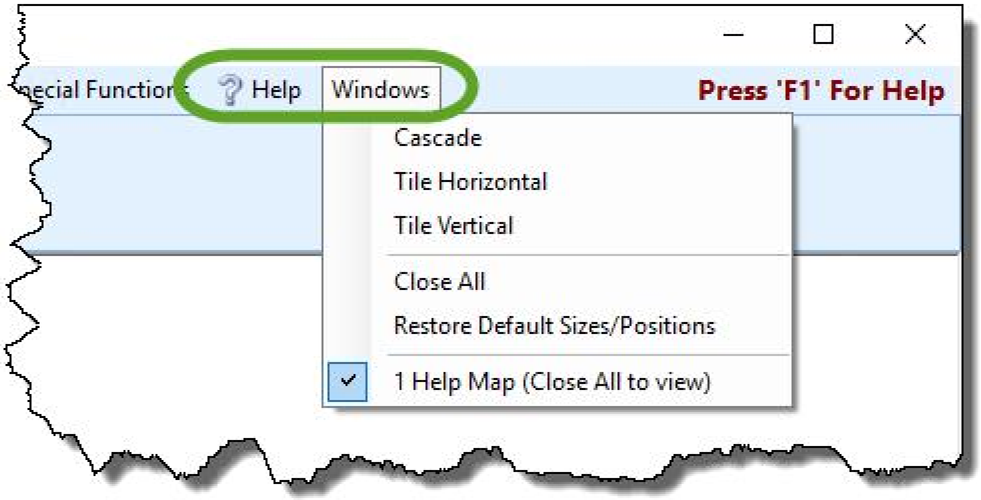
- Either:
    - Go to **Special Functions** and click on **Settings** for the Module in which you want to reset the screens.
    - Click the button to "**Reset all screens to default size and location**" in the settings screen (either on the bottom or on the right side of the screen). This will only affect the screens within that Module.

      OR

    - Click the Windows button at the top of the screen and choose "**Restore Default Sizes/Positions**" from the dropdown list.
- A popup may open asking you to confirm the changes to the screens within that Module: Click **Yes** to continue, **No** to cancel the changes.

Help and Windows

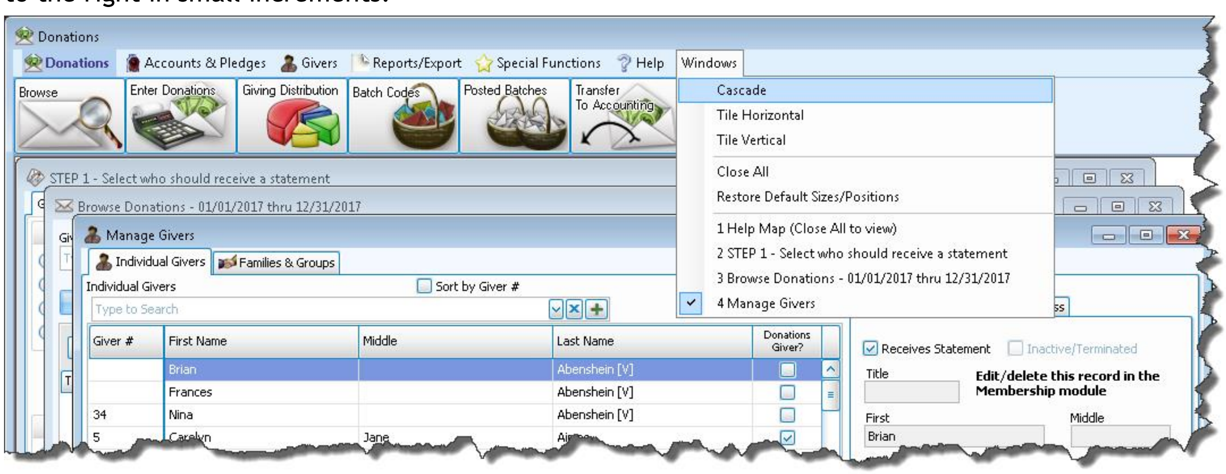
The final two options in the Button Bar across the top of the screen are **Help** and **Windows**.



? Help is a quick link to bring you to these help files. You can also always press **F1** on your keyboard to go to the specific area of these help files relevant to the screen where you pressed the **F1** key.

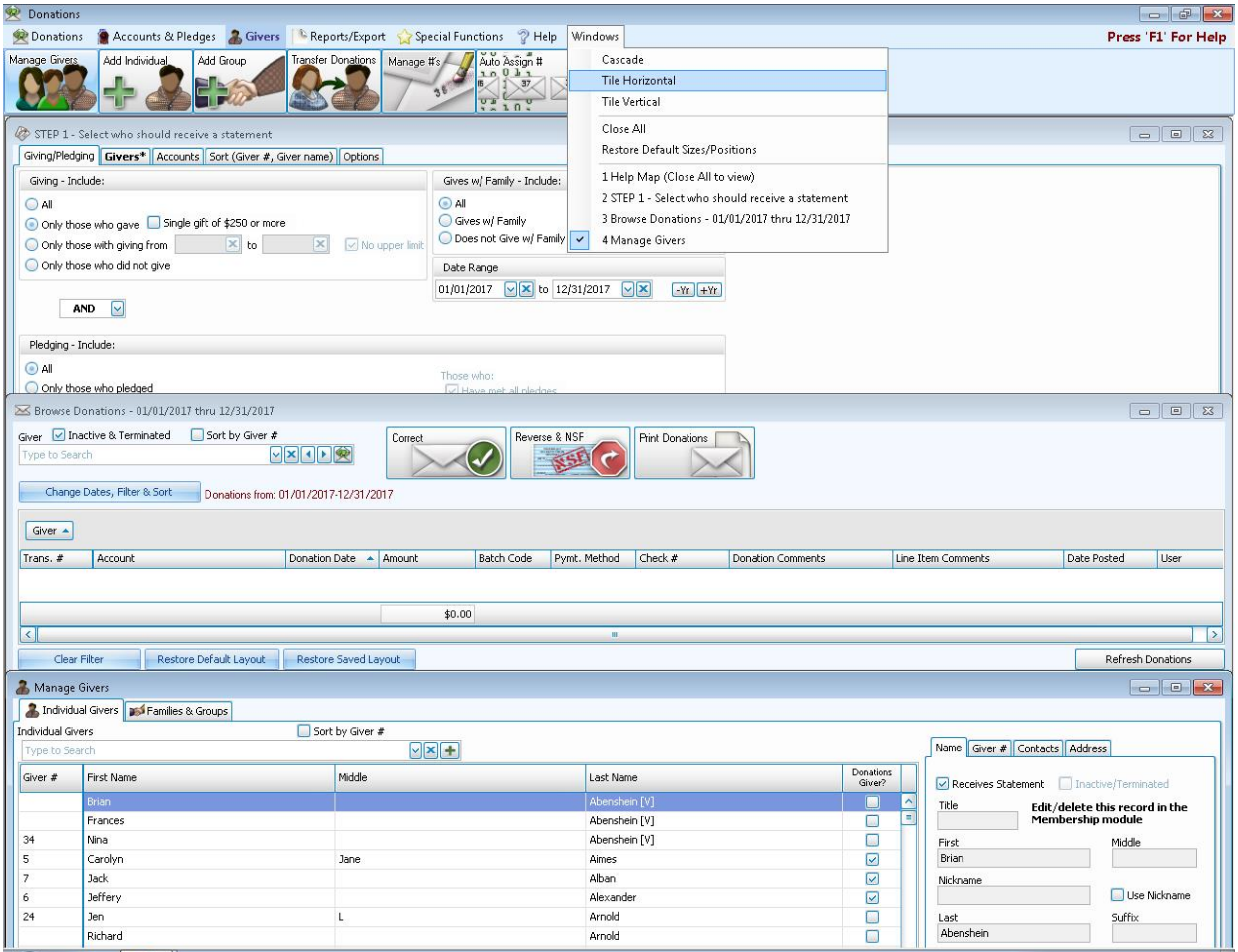
The **Windows** dropdown menu is divided into three sections which allow you to adjust how your windows or screens appear in the current Module. These options are quite handy when multitasking with various functions in the software.

1. The first section provides three choices for arranging the current set of open windows:
   - **Cascade**
     Displays the windows in a staggered formation, starting in the top left corner and continuing down and to the right in small increments:



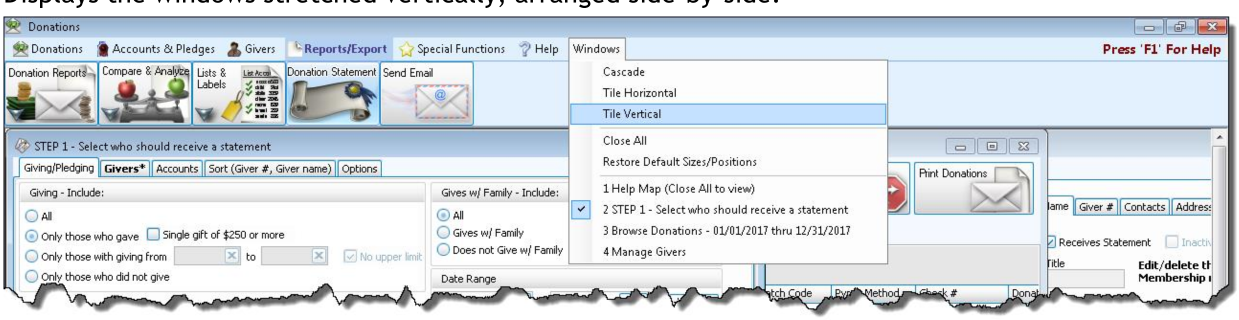
- **Tile Horizontal**

  Displays the windows stretched horizontally, stacked top to bottom:



- **Tile Vertical**

  Displays the windows stretched vertically, arranged side-by-side:



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2. The middle section in this menu includes two functions:

- **Close All** — This will close all open windows in the current Module (useful for functions that require you to close all other windows).
- **Restore Default Sizes/Positions** — This choice will **Restore screens to their original size and position** *(pg 17)*

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3. The bottom section contains a list of each of the windows that are currently open. Clicking on one of them will bring that window to view in front of the other open windows.

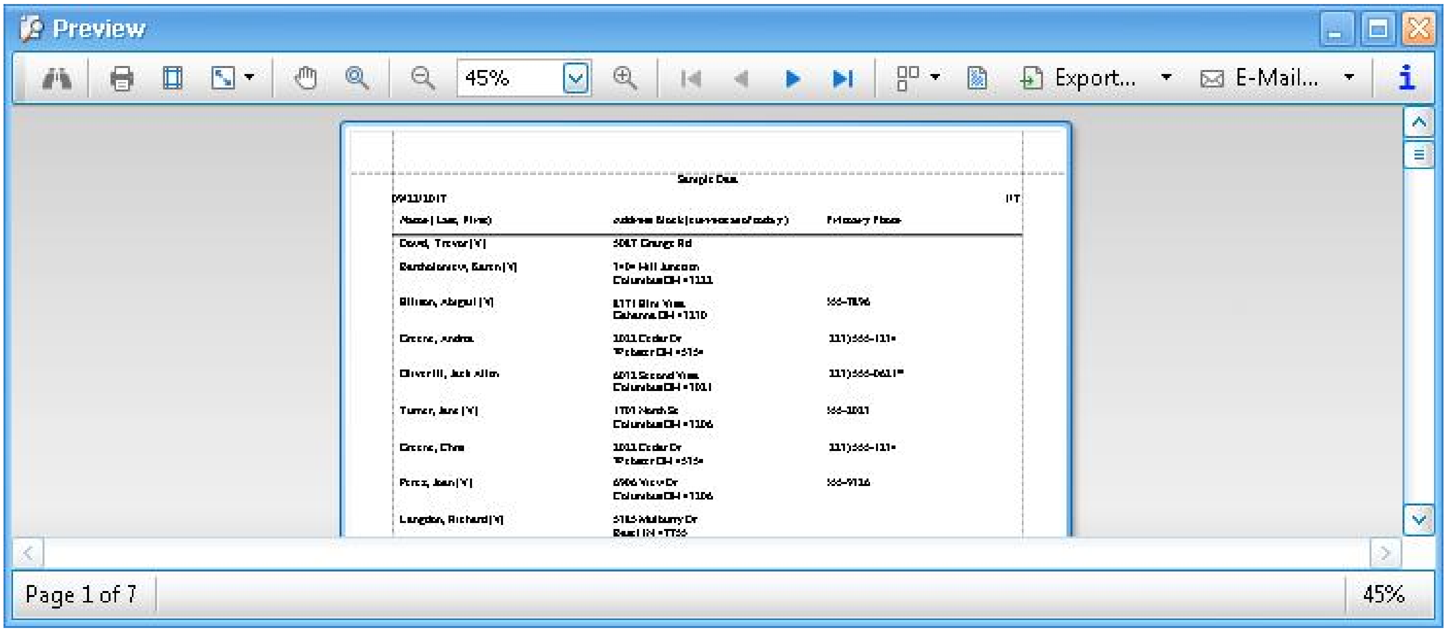
> ***Note:***
>
> *When you choose any function in any Module, if the window does not open, has completely disappeared, or if any of the buttons on the screen are no longer visible (e.g. Next, Print, etc.), **resetting the screen sizes and positions** will almost always fix the issue. This may occur more frequently for web / cloud based and networked users, because different users with different computer monitors will each re-arrange the screens to fit their monitor.*

Print Preview

Throughout Church Windows whenever you click the "**Print**" button it will always take you to a preview screen so that you can see what the document will look like, before you actually print it out. Across the top of this screen is a toolbar where you can choose the final formatting options for your report.

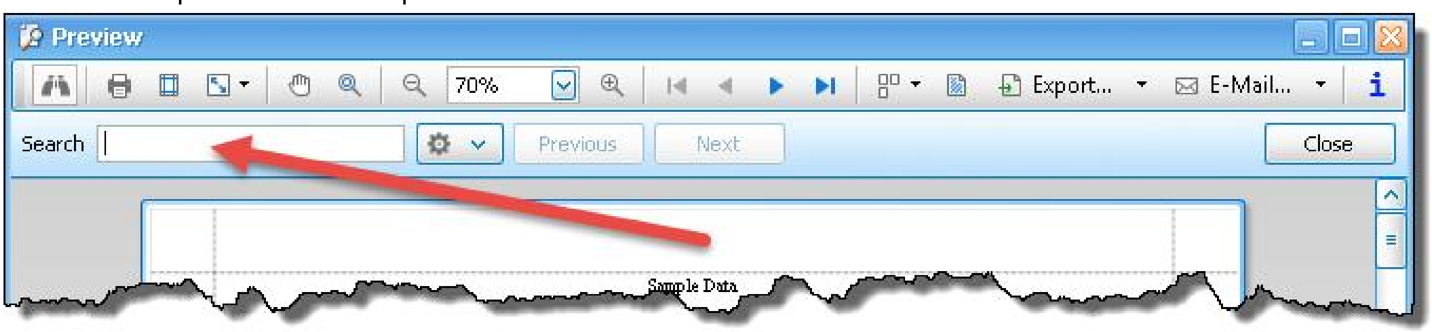
From left to right these buttons are called:

Search *(pg 21)*, **Print** *(pg 21)*, **Page Setup** *(pg 22)*, **Scale** *(pg 23)*, **Move** *(pg 24)*, **Magnifier** *(pg 24)*, **Zoom** *(pg 24)*, **First, Prev, Next or Last** *(pg 24)*, **Pages** *(pg 24)*, **Watermark** *(pg 25)*, **Export** *(pg 25)*, **Email** *(pg 26)*, and **Info** *(pg 27)*



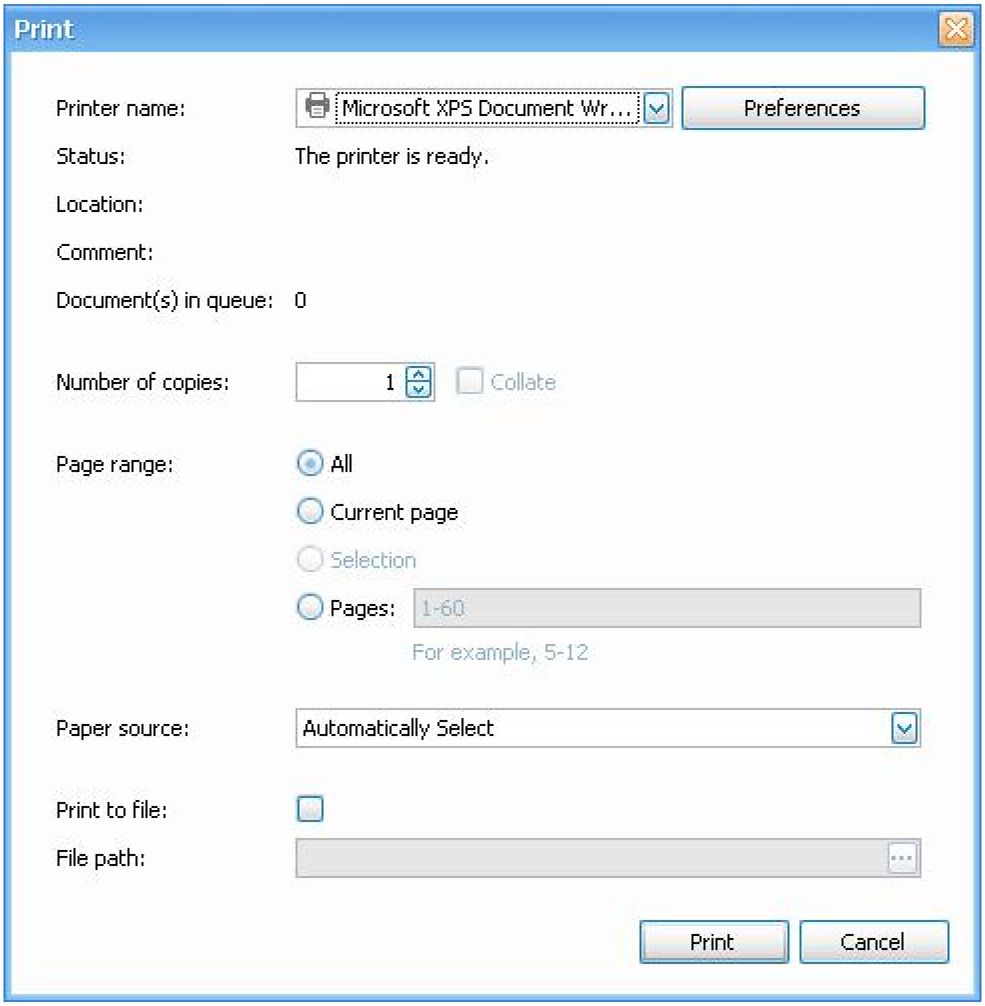
Search

Used to find a particular word or phrase in the document:



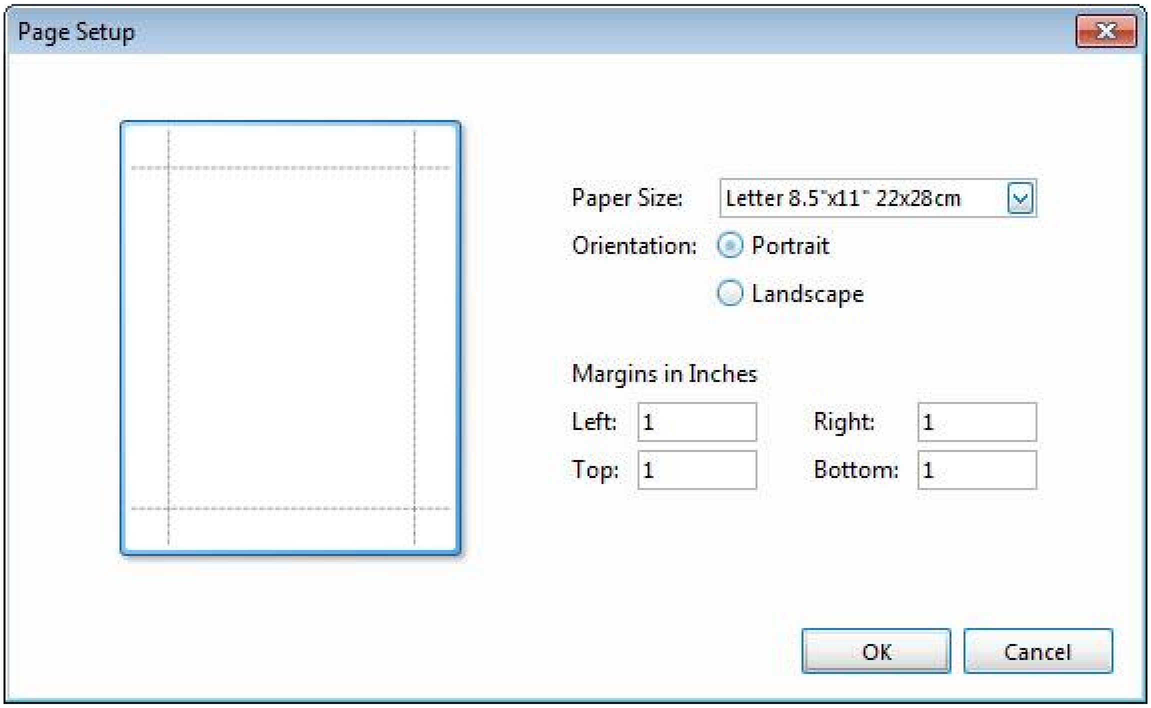
Print

Click this button when you are ready to send the document to your printer. You will see a screen that allows you to choose your printer and number of copies and page range as well as a button to access the Preferences for your specific printer. If you have more than one printer available to you (as in a network setup) you can select a different printer from that screen by clicking the **Printer Name** dropdown:



Page Setup

Click **Page Setup** to adjust paper size, page orientation, and/or margin settings. The **Page Setup** dialog box will appear:



- **Paper Size**
  If your printer supports multiple paper sizes, you will see the available options in the dropdown list. Make your selection by clicking on the dropdown button, then clicking on your choice.

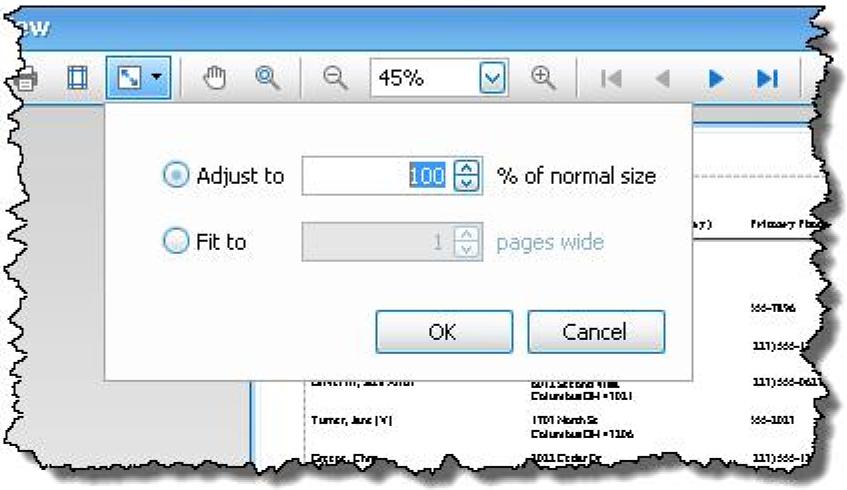
- **Orientation**
  Choose between portrait or landscape using the radio button.

- **Margins in inches**
  You may adjust the left, right, top or bottom margins, if you wish.

- Click **OK** to close the **Page Setup** dialog box and keep your changes, or click **Cancel** to close the box and discard your changes.

Scale

Click to adjust the size of the report on the page when you print it. You can scale up or down by percentage or you can set it to print more than one page of the report per piece of paper:



Move

Click if you would like to be able to move around in the page with your mouse (click, hold, and drag the hand to move around the page). This is simply a different way to navigate around on the preview page, you can also use the scroll bars if you like.

Magnifier

This button allows you to switch back and forth between viewing the preview at 100% and another Zoomed percentage that you set (see Zoom below).

Zoom

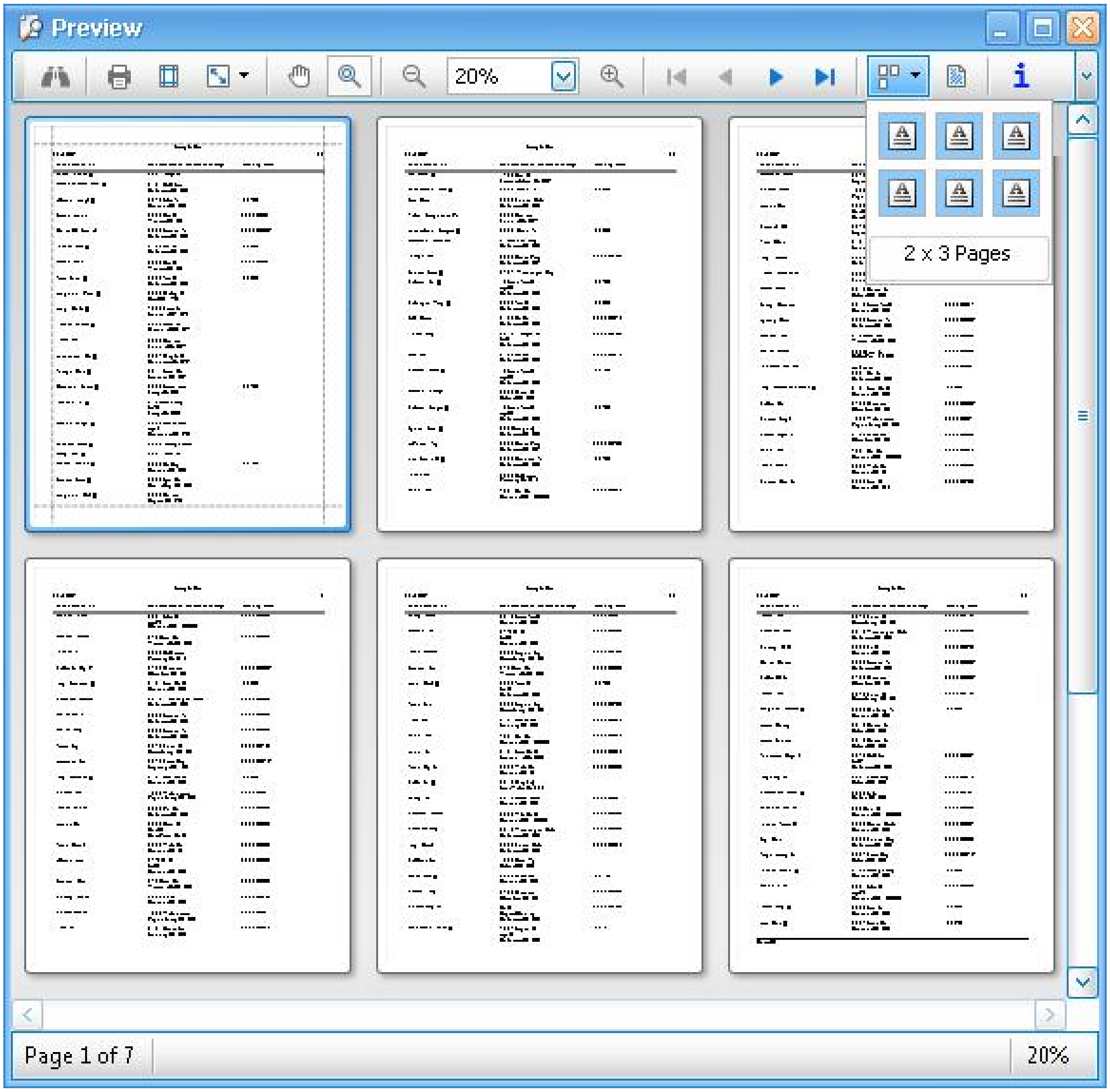
These buttons allow you to zoom in or out on the preview of the document. You can either click the **+ In** or **— Out** buttons or click the down arrow on **Zoom** and choose a specific percentage of zoom.

First, Prev, Next or Last

Click any of these buttons to skip to other pages in the preview.

Pages

Click this button to change the number of pages being displayed at once on the preview screen. The default is one page by one page. Hover your mouse over the number of pages you'd like to view, such as 3 pages side to side and 2 pages top to bottom:

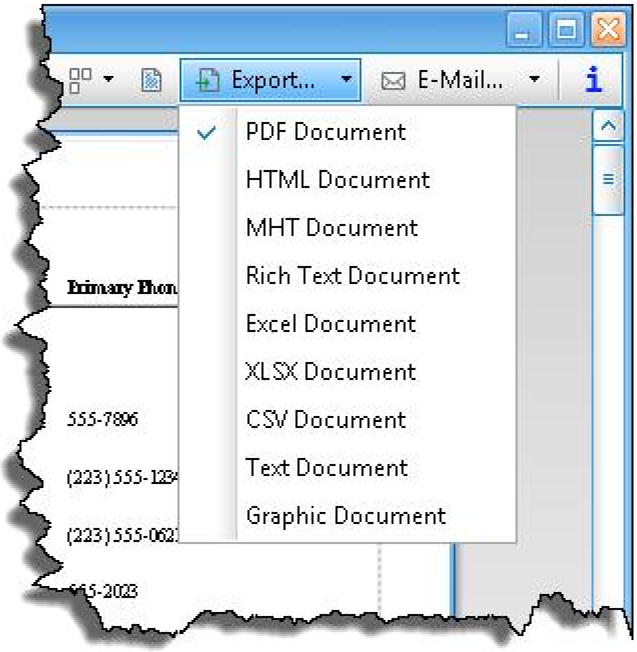


Watermark

This button allows you to add text or a picture to the background of the printed report.

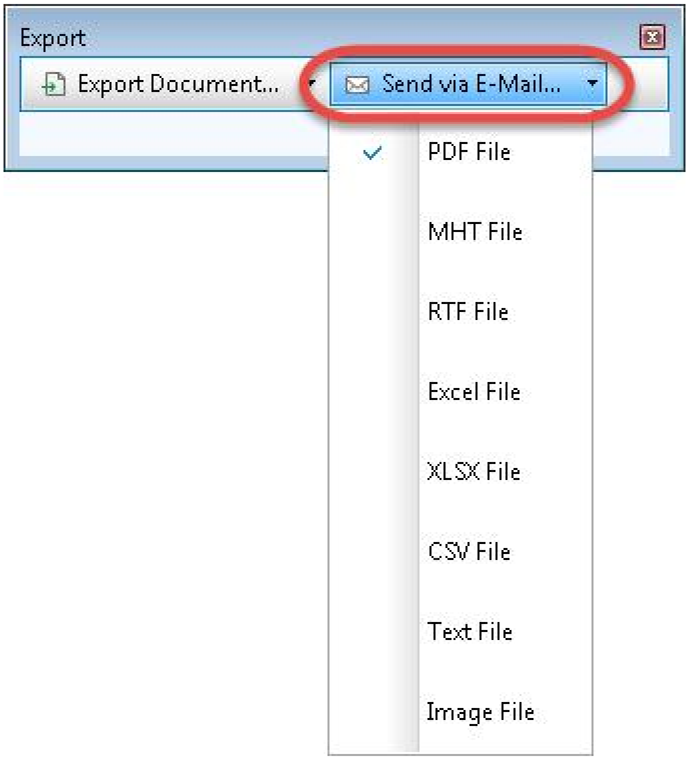
Export

This button allows you to save the report in one of several standard formats for use in other programs. Click the down arrow to choose the file format you would like to Export to. The type of file you choose should be determined by the other software with which you want to use the data. You will then see a form that allows you to adjust the settings, if needed, and then choose a name and a location for the file.



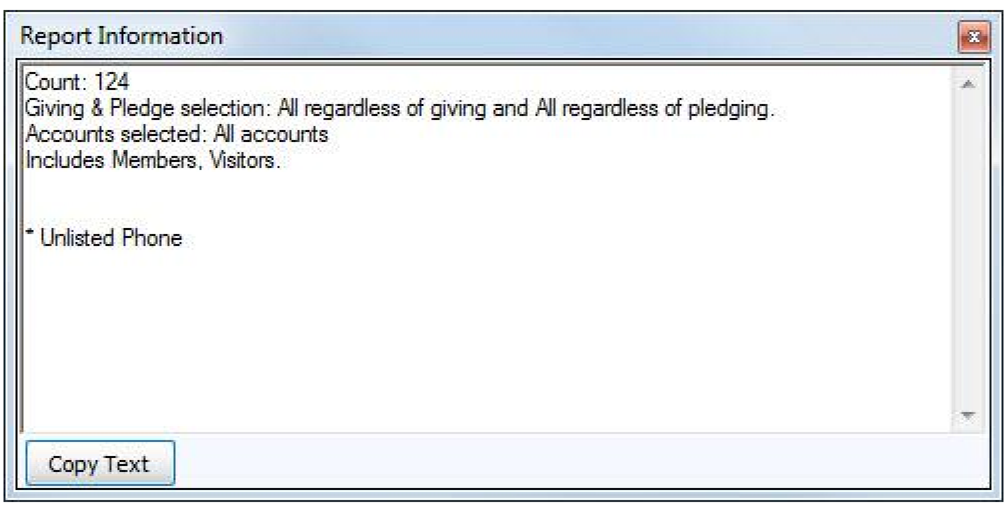
Email

This button will convert the report to one of several file formats and attach it to an external email, such as Outlook or another 3rd party email client installed on your computer. Click the down arrow to choose the format you would like it converted to. (PDF file format is a very common way to send reports via email.) You will be asked to name the file and choose a location for it to be saved. When you click **OK**, it will create the file and attach it for you to Send via Email.

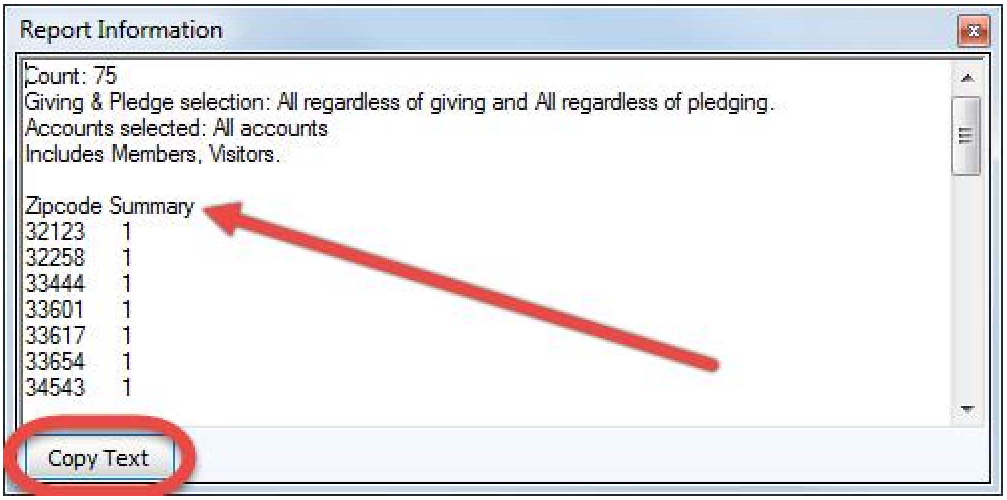


Info

This button is a quick way to get Report Information including a count of how many total items are on the whole report as well as a breakdown of the criteria you used for creating the report itself (this information is also displayed at the very end of most **Membership** and many **Donations** reports):



When printing Labels, this will also contain a Zipcode Summary which can be copied and then pasted into another program, if needed:


Report Information
Count: 75
Giving & Pledge selection: All regardless of giving and All regardless of pledging.
Accounts selected: All accounts
Includes Members, Visitors.
Zipcode Summary
32123 1
32258 1
33444 1
33601 1
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Chapter 2 - Membership

Membership

The **Membership** Module is a compendium of information about the people involved in your Church, available in an easy-to-view and quickly accessible layout.

Family and Individual Records

- View The Family Record and The Individual Record screens simultaneously
- Track Family and Individual Alternate Addresses
- View all Family names (with option to display ages)
- Accommodate non-traditional and traditional family structures effortlessly
- Create different Categories to organize the families in The People File
- Customize Fields to meet your Church's record keeping needs

Connect with People

- Access and send individual emails with minimal mouse clicks
- Easily Send Emails to a number of people, a group, or a committee
- Track information **About Attendance** *(pg 36)* for specific groups, classes, Events, and Sunday worship
- Enter Personal Visits, and make notations, including Follow-Up Date

Reporting

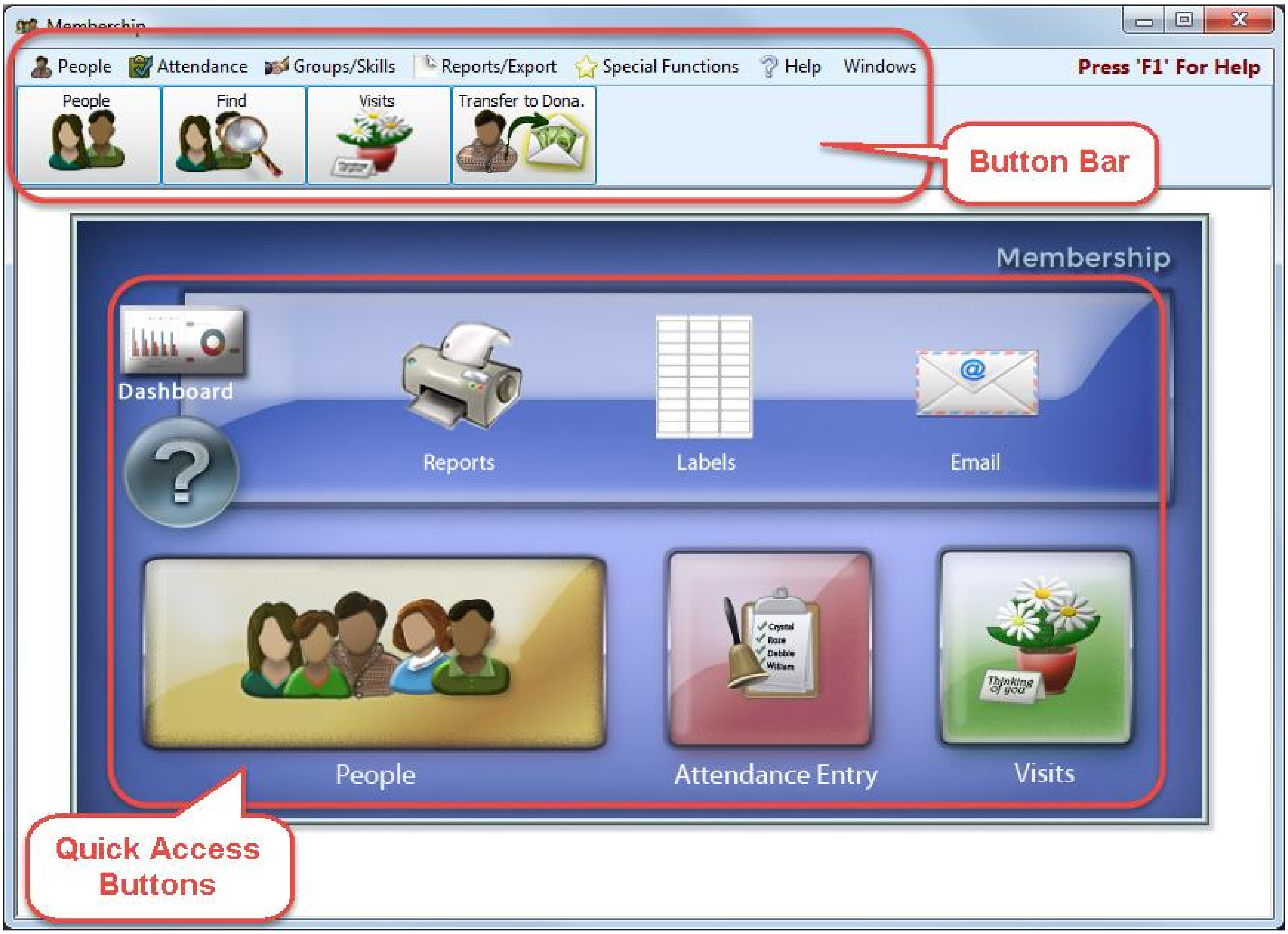
- Create Attendance Reports and Visits Reports in summary or in detail
- Create Custom Reports / Directory / Export and Labels based on criteria you choose
- Export information for viewing in a spreadsheet program or merging with a word processor
- Print a Church Directory / Custom Reports in multiple, flexible formats with or without pictures

And much, much more...

About Membership

If you have been using an older version of Church Windows prior to version 20, you'll notice that **Membership** has gotten a big update.

When you click on the **Membership** button from Opening Church Windows *(pg 3)*, it will open a whole new window we will call the **Membership** Portal. This will have seven different **Quick Access Buttons** in the center of the screen as well as a **Button Bar** across the top of the screen to choose from different functions depending on what you need to do.



Quick Access Buttons

Dashboard — Each module contains an area called the Dashboard which contains various charts and graphs.

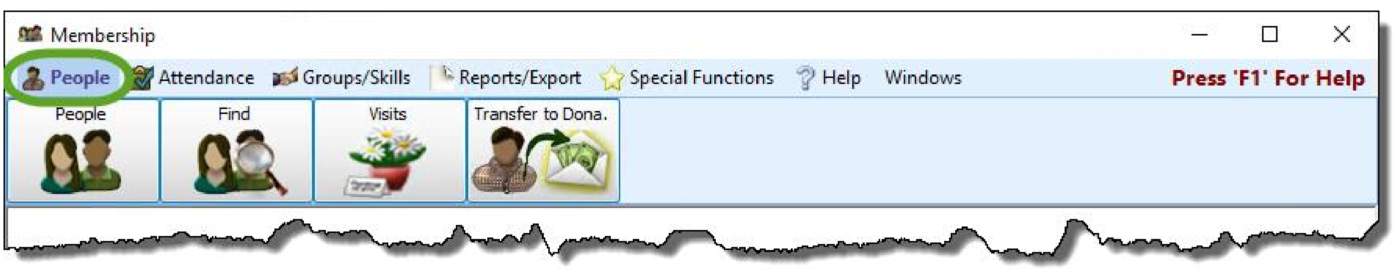
? — This is the **Help** button which will open this help interface (you can also press the **F1** key on your keyboard from anywhere in Church Windows to bring you to the relevant section of these help files).

Reports, **Labels**, and **Email** — This is now the quickest way to get to the interface for Reports / Directory / Exports, Labels, or Setup Email. There are links to some specific reports through various other screens such as The Find Grid, or attendance reports, but if you just need to get directly to specific **Membership** reports to print, export, or email, this is the best method to use to get to each of them.

People, **Attendance Entry**, and **Visits** — **The People File** button will take you to your database of family and individual records for Members, Visitors, and other Categories of people. **Attendance Entry** will take you straight to the screen to record attendance for your **Events** *(pg 38)* **and Groups / Classes** *(pg 38)*. **Visits** will take you to the personal visits screen.

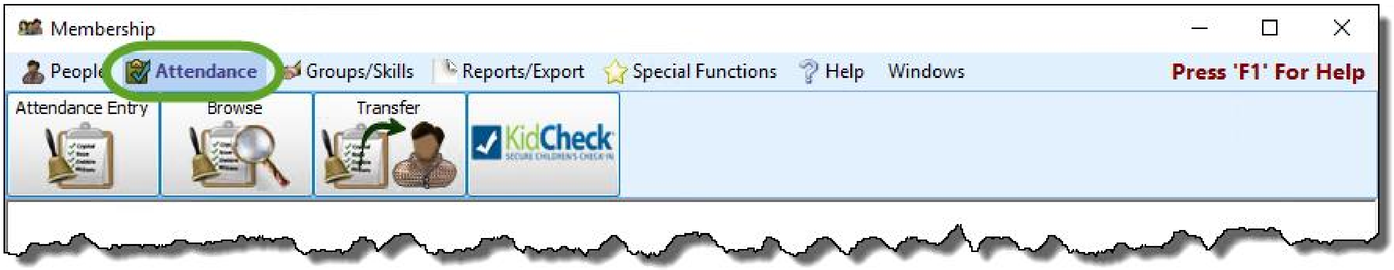
Button Bar

People



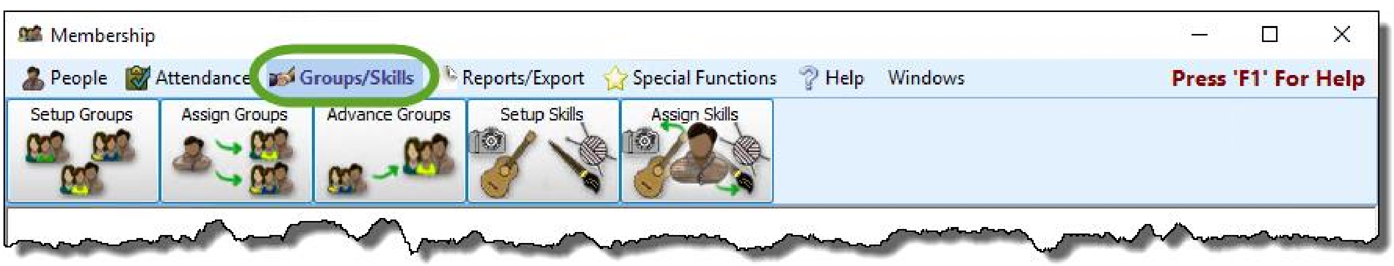
- The People File allows you to interact with the records for families and individuals in your database, regardless of whether they are **Members**, **Visitors**, or any additional **Family Categories** *(pg 47)* of people which you are now able to add to the database to organize the records.
- **Find** will help you locate and edit information for families and individuals Using the Find Function and displaying the records in The Find Grid.
- Visits helps you to track and schedule when someone in the congregation is visiting or is visited by another person.
- Transfer

Attendance



From the Attendance menu, you can perform Attendance Entry and Browse Attendance records for people, Events, and Groups / Classes as well as Transfer Attendance from one person to another. Additionally, you can synchronize Church Windows with our partners at KidCheck if you subscribe to their service as well.

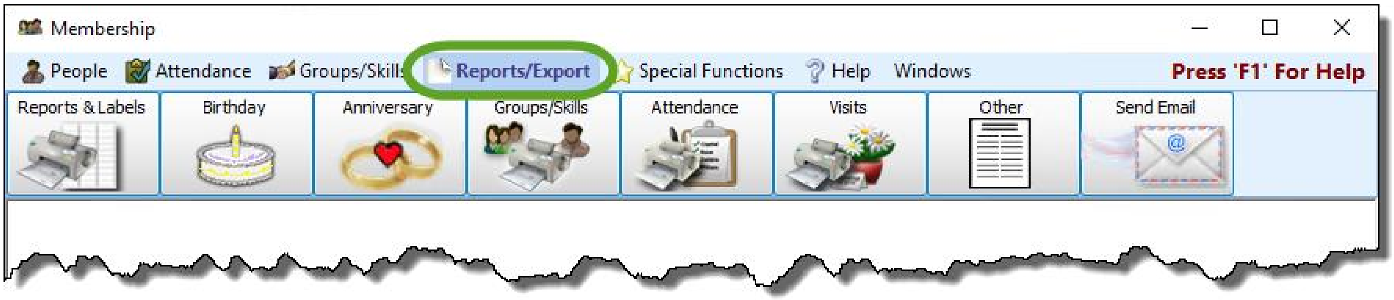
Groups / Skills



Here, you have options to Setup Groups and Classes and maintain a list of Skills. Once setup, Managing Group Members using Assign Groups & Skills and Managing Skills / Interests using the Assign Groups / Skills Screen allows you to add individuals in The People File to the applicable Groups / Classes and Skills. Additionally, you can use the Advance Groups / Classes function to "graduate" one class to the next.

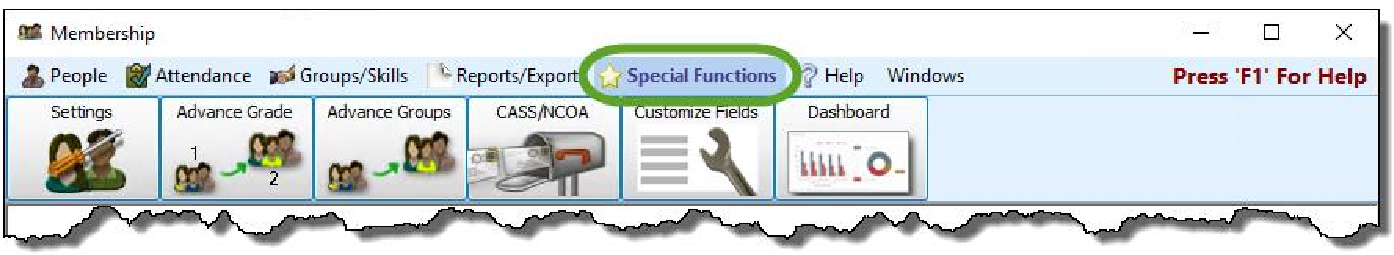
> For example, you can move the entire roster of each of your Sunday School classes from one age group / grade level to the next.

Reports / Export



These options let you create and print a variety of Reports / Directory / Exports, Labels, Birthday and Anniversary Reports, Attendance Reports, and Visits Report, as well as Export reports in various file formats and even Send Email.

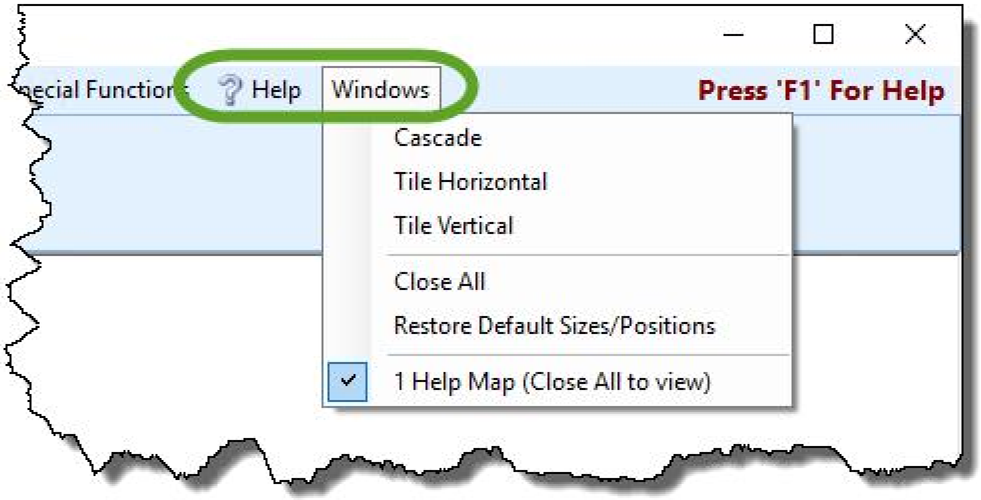
Special Functions



These options allow you to adjust the default Membership Settings, Advance School Grades recorded on The Individual Record, and Advance Groups / Classes from one level to the next.You can **Create a CASS/NCOA file** *(pg 211)* or **Import your Output from Lorton** *(pg 213)* to verify the addresses in your database for **Bulk Mailings** *(pg 202)*. Additionally, you can Customize Fields in The Family Record and The Individual Record to store all of the information you need. Finally, you can view and customize various charts and graphs on the Dashboard.

Help and Windows

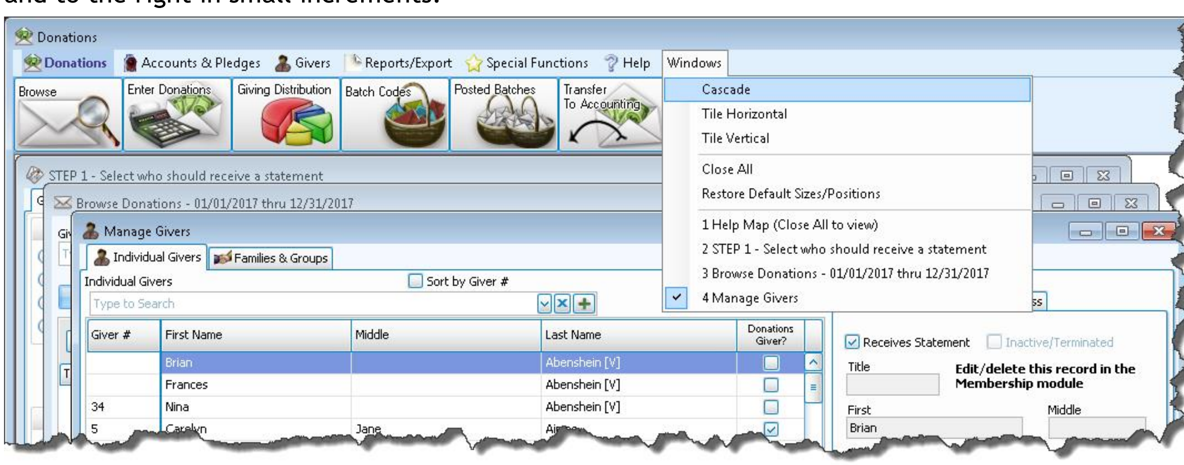
The final two options in the Button Bar across the top of the screen are **Help** and **Windows**.



? Help is a quick link to bring you to these help files. You can also always press **F1** on your keyboard to go to the specific area of these help files relevant to the screen where you pressed the **F1** key.

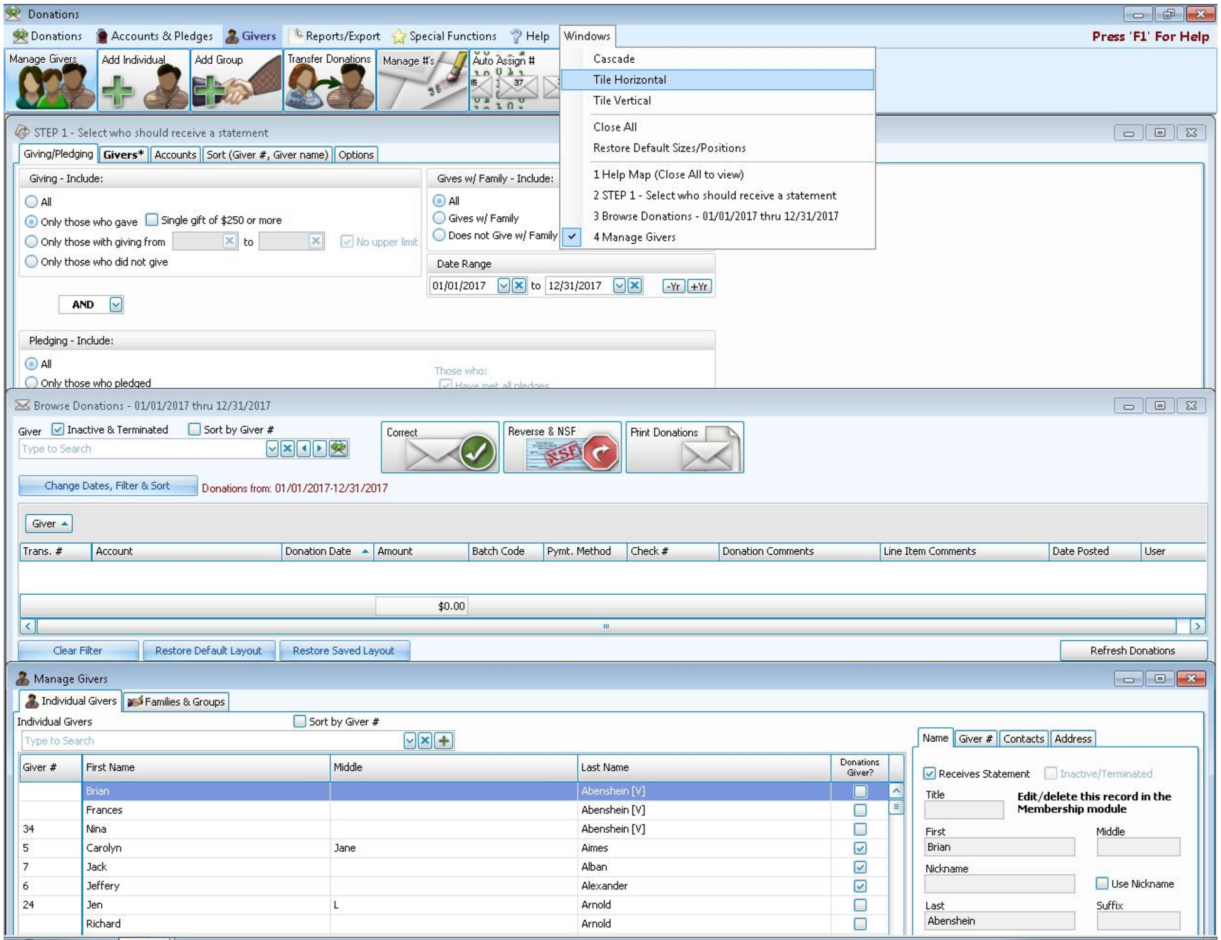
The **Windows** dropdown menu is divided into three sections which allow you to adjust how your windows or screens appear in the current Module. These options are quite handy when multitasking with various functions in the software.

1. The first section provides three choices for arranging the current set of open windows:
    - **Cascade**
      Displays the windows in a staggered formation, starting in the top left corner and continuing down and to the right in small increments:



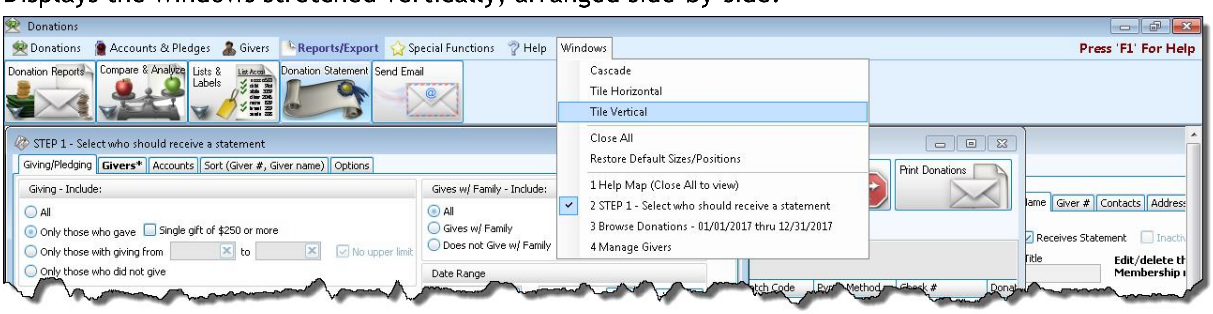
- **Tile Horizontal**

  Displays the windows stretched horizontally, stacked top to bottom:



- **Tile Vertical**

  Displays the windows stretched vertically, arranged side-by-side:



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2. The middle section in this menu includes two functions:

   - **Close All** — This will close all open windows in the current Module (useful for functions that require you to close all other windows).

- **Restore Default Sizes/Positions** — This choice will **Restore screens to their original size and position** *(pg 17)*

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3. The bottom section contains a list of each of the windows that are currently open. Clicking on one of them will bring that window to view in front of the other open windows.

About Attendance

The Attendance portion of Church Windows is an easy and powerful way to keep track of attendance at Church functions and for Church Groups and Classes. Attendance Entry for a specific Group, Class, or Event is simply a matter of "check marking" the names of those who attended that day. To learn how to get started, see **Attendance Setup** *(pg 37)*.

This component of the software can do several things, it can:

- Record the **names** of the people who attended **Events** *(pg 38)* or **Groups / Classes** *(pg 38)*.
- Track the **total attendance** at **Events** *(pg 38)* or **Groups / Classes** *(pg 38)* (since the "head count" often differs from the number of names you have).
- Record an additional facet of people's attendance at an Event, such as whether or not they participated in **Communion**.
- You may also Re-label Permanent Fields including "Communion" and use it for anything else you'd like to track.
- Copy Attendance from one date / Event / Group / Class to another — you do not have to re-select each person who attended on the new date, so you save time and keystrokes!
- Track up to six items of **Additional Information** for a Group / Class, such as how many children learned their Bible verses for the day, or how many people brought their Bibles to class.
- Maintain **General Meeting Notes** about that Event or Group / Class: perhaps you will comment on how well the class went, or whether or not you had good participation in the discussions or activities. You might make a note of the major items of discussion at a committee meeting, or note that Mr. or Mrs. XXX appears to be an effective group leader.
- Identify **Lesson Studied** so you can track topics or Bible verses used as the basis for class.
- Identify **Attendance Factors** — things that might have affected attendance at this Event, or Group / Class meeting. Was there inclement weather? Perhaps it was a holiday weekend?
- **Advance Groups / Classes** to move people from one class to the next efficiently.

- Produce Attendance Reports on **individuals attending, group totals, those who have not attended** within a given time frame and more.

What is the difference between an Event and a Group / Class?

- An **Event** is something that everyone in the People database is eligible to attend, such as Sunday worship or a concert.
- People are enrolled in a **Group or Class**, although a not-enrolled individual may also attend.
- Before you can record attendance you must begin by Add Groups / Classes and you must Add Events.

Attendance Setup

Attendance may be taken for **Events** — such as Sunday worship — or for **Groups and Classes** — such as Sunday School, choirs, or committees.

Taking attendance may consist of either:

- Taking a head count and entering that figure into the system for a given date.
- Recording in the system the actual names of people who attended on a given date.

In either case, after completing Attendance Entry you will be able to create several different Attendance Reports, including a chart of the attendance, with or without the average attendance, and even reports of non-attenders.

"Events" vs. "Classes"

Before we begin with Attendance Entry, it is important to discuss the difference between "**Events**" and "**Classes**." These are two different entities with different purposes:

Events

- Functions that everyone in your database can attend.
- You must Add Events to the software to begin tracking attendance for these types of functions.

> Examples of **Events** might include:
> Sunday worship, community outreach, fellowship gatherings, etc.

Groups / Classes

- Consists of your list of Groups / Classes or Committees.
- In the **Membership** Module of Church Windows, people from any **Family Categories** *(pg 47)* may be enrolled as members of Groups / Classes.
- Only people who are already members of a Group or Class will be listed as **Enrolled**.
- Everyone else in The People File will be listed as **Not Enrolled**.
- Those not enrolled may be enrolled in the class at the time you are doing Attendance Entry for a given date.
- Or, you can mark someone as attending but leave them not enrolled in that Group / Class.
- Start by Add Groups / Classes and Managing Group Members using Assign Groups & Skills to create your list of groups and add people as members of these groups.

> Examples of **Groups /Classes** might include:
> Sunday school, confirmation class, first communion classes, bible study, knitting/quilting circle, etc.

You may also want to customize your Attendance Options . Then see Attendance Entry to begin recording attendance.

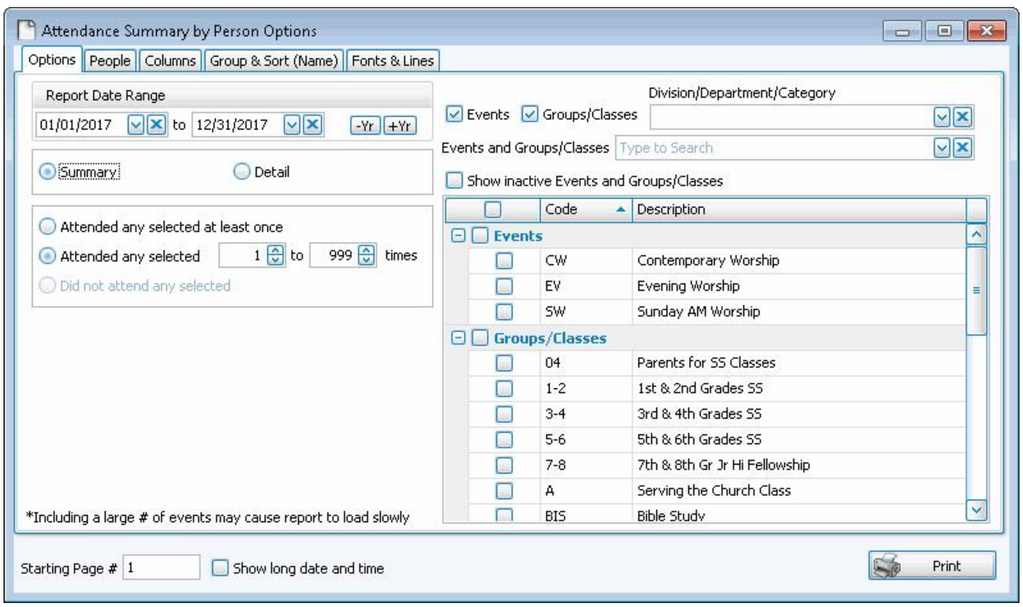
Attendance Reporting Exercises

Try the following exercises to practice utilizing the capabilities of Attendance Reports.

List of All Those Who Attended

Once you have recorded attendance information for an **Event**, you may easily get a report that lists the people who were at that Event or for those who did not attend that Event. There are quite a few ways to get this report. For this exercise, we will use the Attendance Summary by Person report.

- From The Initial Portal of Church Windows choose **Membership**
- From the Button Bar, choose **Reports / Export**
- Click **Attendance**
- Choose **Summary by Person**
- The **Attendance Summary by Person** screen will appear:



- Click Events since we are running this report for the Sunday worship. You can use this report to get an attendance report for any of your Groups and Classes by clicking on **Include Groups / Classes**. But for now, just select **Events**.

Two formats are available for this report:

Summary

Looks at all the Events or Groups/Classes and compiles a table showing:

- First and Last name
- Total number of times each person has attended any Event or class
- Last date they attended any Event or class
- Name of the last Event or class they attended

- Change the **Date Range** to the date of the Event that you recorded attendance for earlier. Place this date in both boxes to get a list of the people who attended just this date.

> ***Note:***
>
> *It is also possible to put a range of dates in these boxes to get a list of people who attended or didn't attend in a longer range of time. But for now, put the same date in both fields, since we're getting a list of everyone who attended just this one day.*

- Because we are looking at just one Event, you will see:
  - First and Last name
  - The number of times they attended that service, which will be 1 in this case
  - The date they last attended any Event (which will be the date you entered into the **Date Range**)
  - The last Event they attended (which will be the name of the event you recorded attendance for)
- If you enter a **Date Range** of several weeks, then the report shows:
  - The last date attended any Event
  - The name of the last Event they attended.
  - This is helpful if you have more than one event for which you track attendance: someone may not have attended this particular event, for example, the Sunday worship, but is attending another event.
- Click **Print** to compile and view the report on the **Print Preview** *(pg 20)*.

Detail

Allows for the selection of specific **Events** *(pg 38)* or **Groups / Classes** *(pg 38)*.

- ◦ You may ask for only those people who **Did not attend** an Event or Group / Class.
- ◦ You may also limit your report to include only those people who have attended the selected Event or Group / Class a certain number of times, or a range of number of times. Enter this range into the **Attended Number of times** boxes, with the lowest number in the range in the first box, and the highest number in the range in the second.
- ◦ You may also ask the report to **Include the number of times attended**, to **Include the last date attended each selected Group or Class**, and Additional Information (such as how many students learned their verses for that week or brought their Bible to class). These selections will be made on the Columns Tab.

- ◦ Select **Detail**.
- ◦ Select the Event you just recorded attendance for.
- ◦ First, click the radio button by **Number of Times** to indicate the **Number of Times** people should have attended in order to appear on this report. The Number of Times defaults to 1 through 999 times; leaving these boxes as they are would give us a list of those people who attended one or more times. (We could specify a certain range of times, but for now, just leave these fields as they are or change them to "1 thru 1".)
- ◦ If you want the number of times they have attended this Event, put a checkmark in the box Include **Number of Times Attended**.
- ◦ If you want the *last date they attended any Event* included in the report, put a checkmark in the box **Include Last Date Attended**.
- ◦ Click **Print** to compile and view the report on the **Print Preview** *(pg 20)*.
- ◦ This report will include the names of everyone who attended your Sunday worship Event on that date. Because we selected only one event and one date, the report looks very similar to the **Summary** *(pg 39)* format.
- ◦ For a final report option, click the radio button by **Did Not Attend Any Selected**.
- ◦ Click **Print** to compile and view the report on the **Print Preview** *(pg 20)*.
- ◦ Now the report will be a list of everyone who did NOT attend that Event.

- For any of these Attendance Reports you can also enter People Selection Criteria on the **People tab** to further limit your search criteria and use the Columns Tab, Sort / Group & Sort Tab, and/or Fonts Tab to customize the look of your report, if needed.

- If you wish to print any of these reports, click **Print**. You can also Export any report as a file to be used outside of Church Windows and/or Send via Email.

> ***Note:***
>
> *You can also get attendance reports using the Reports / Directory / Exports function. This is particularly helpful if you would like to include additional criteria in your report, as explained in the next exercise.*

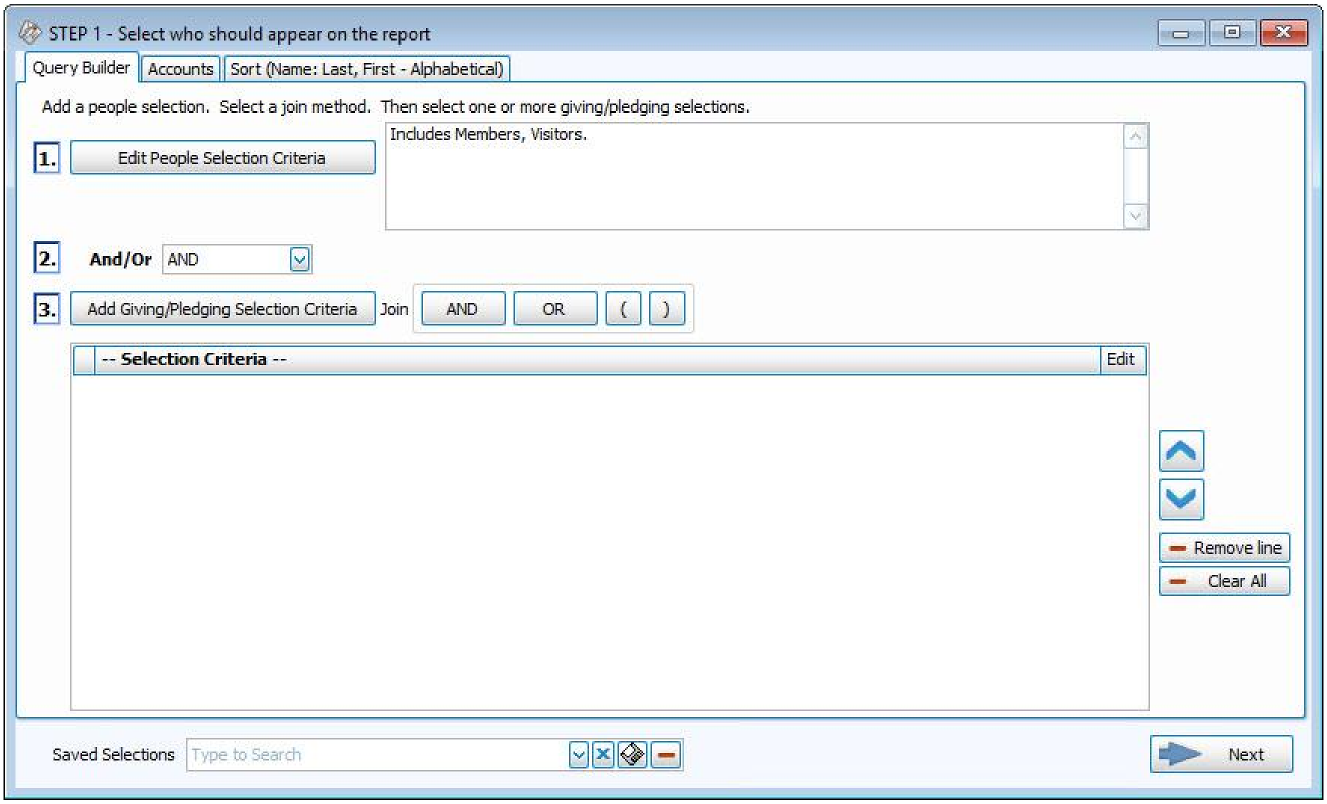
List of Members Who Did Not Attend

Another attendance report that may be helpful is a list of those people who did not attend a certain Event. You could easily create such a report following the steps outlined previously using the " Attendance Summary by Person" (by choosing **Detail** *(pg 40)* and "Number of times"), but the report that you create there will include on the list everyone in your database who did not attend.

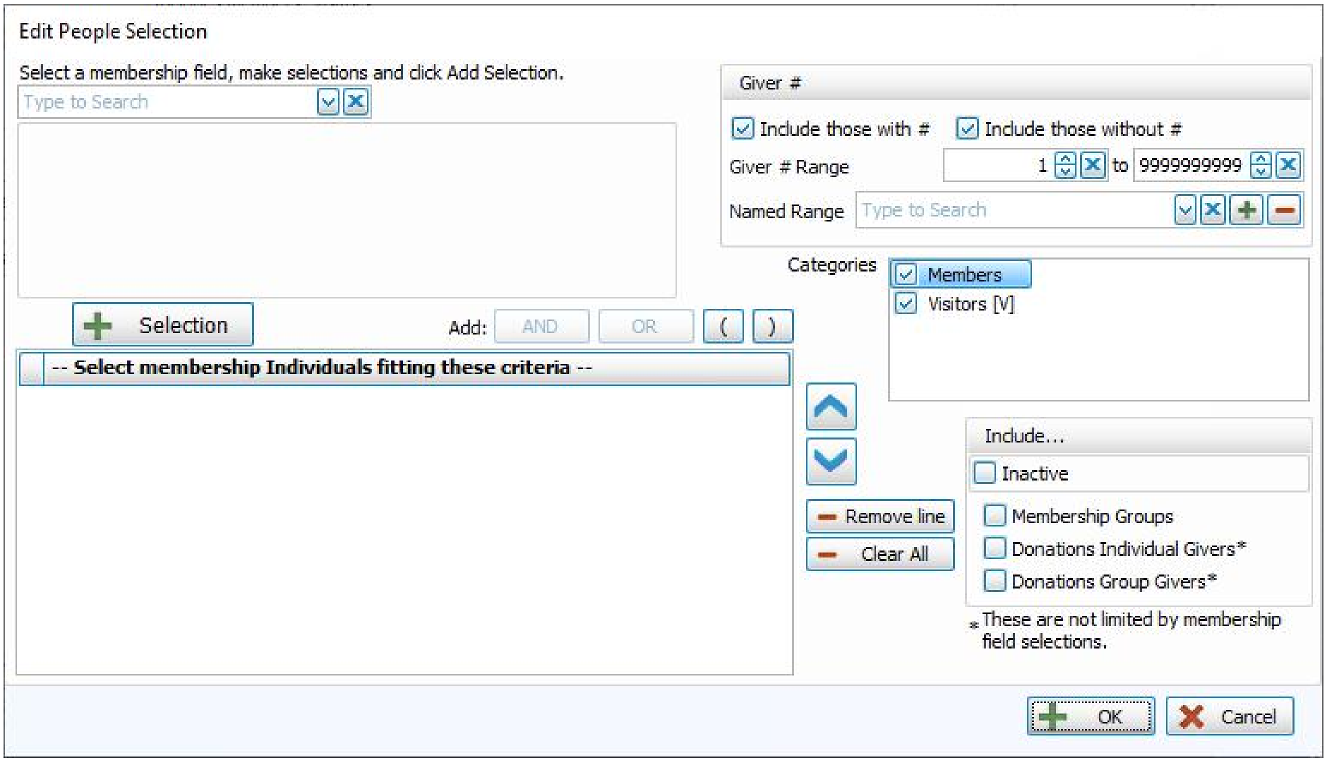
Sometimes it may be more helpful to narrow the list of non-attenders down by their Individual Record Fields. This can be done by Combining Membership and Attendance Data on Reports. For this example, we will ask for a list of only those in the Members **Family Categories** *(pg 47)* who did not attend any services this year to date. The best place to combine criteria like this for a report is on the Reports / Directory / Exports screen.

- From The Initial Portal of Church Windows choose **Membership**
- Choose **Reports** from the **Membership Quick Access Buttons**

- The **Step 1 — Select who should appear on the report** screen will appear:

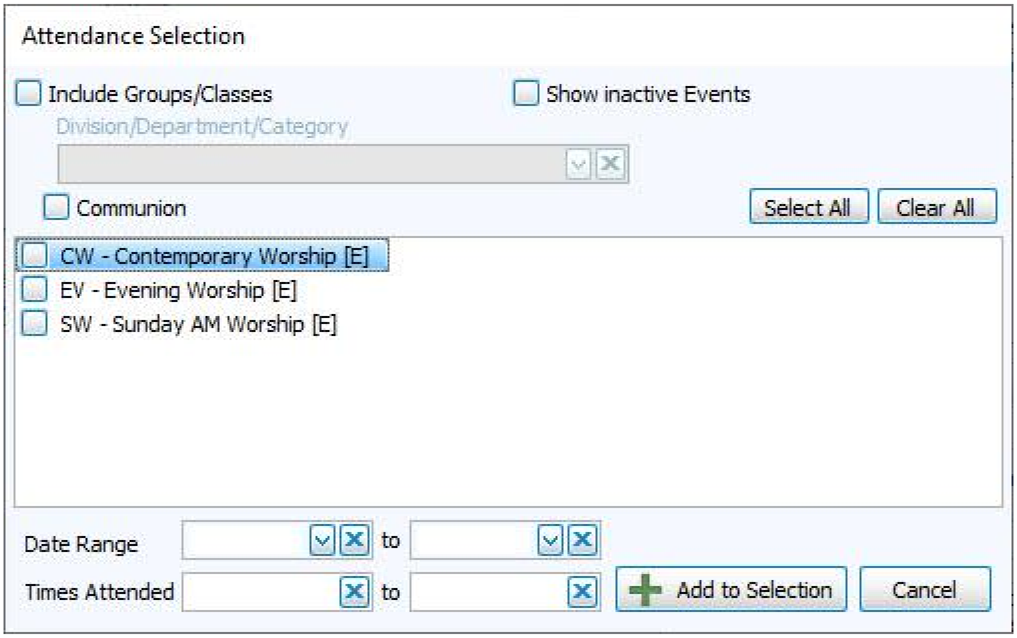


- Click the **Edit People Selection Criteria** button and a new window will open:

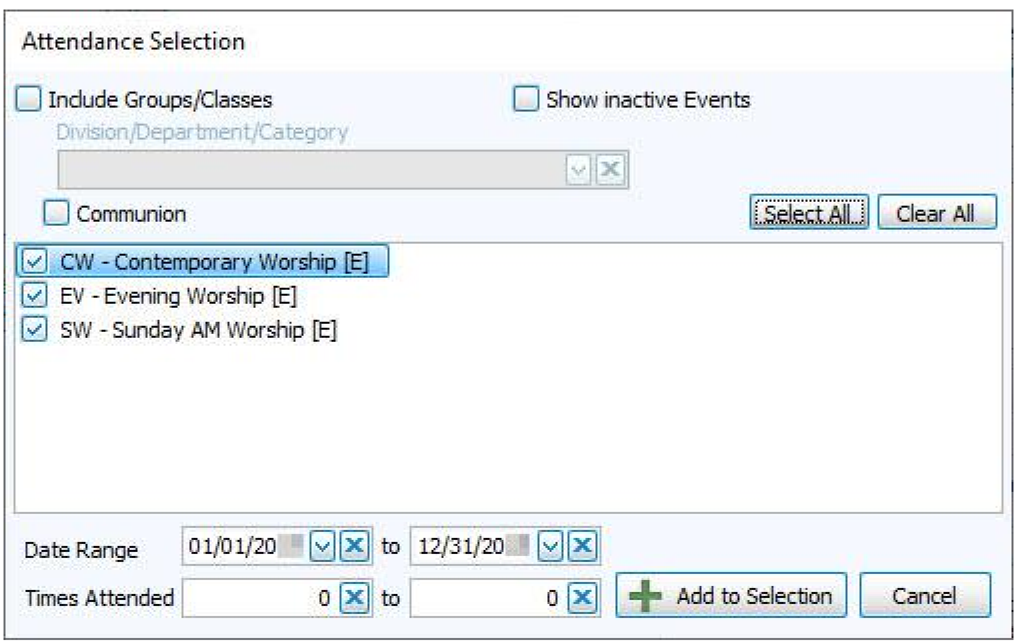


- In the **Categories** box, uncheck **Visitors** any custom Family Categories *(pg 47)* so that only **Members** are selected.
- Then at the top left, use the **Membership Field** dropdown to select the first option, **[Attendance]**.

- You will get an **Attendance Selection** screen:

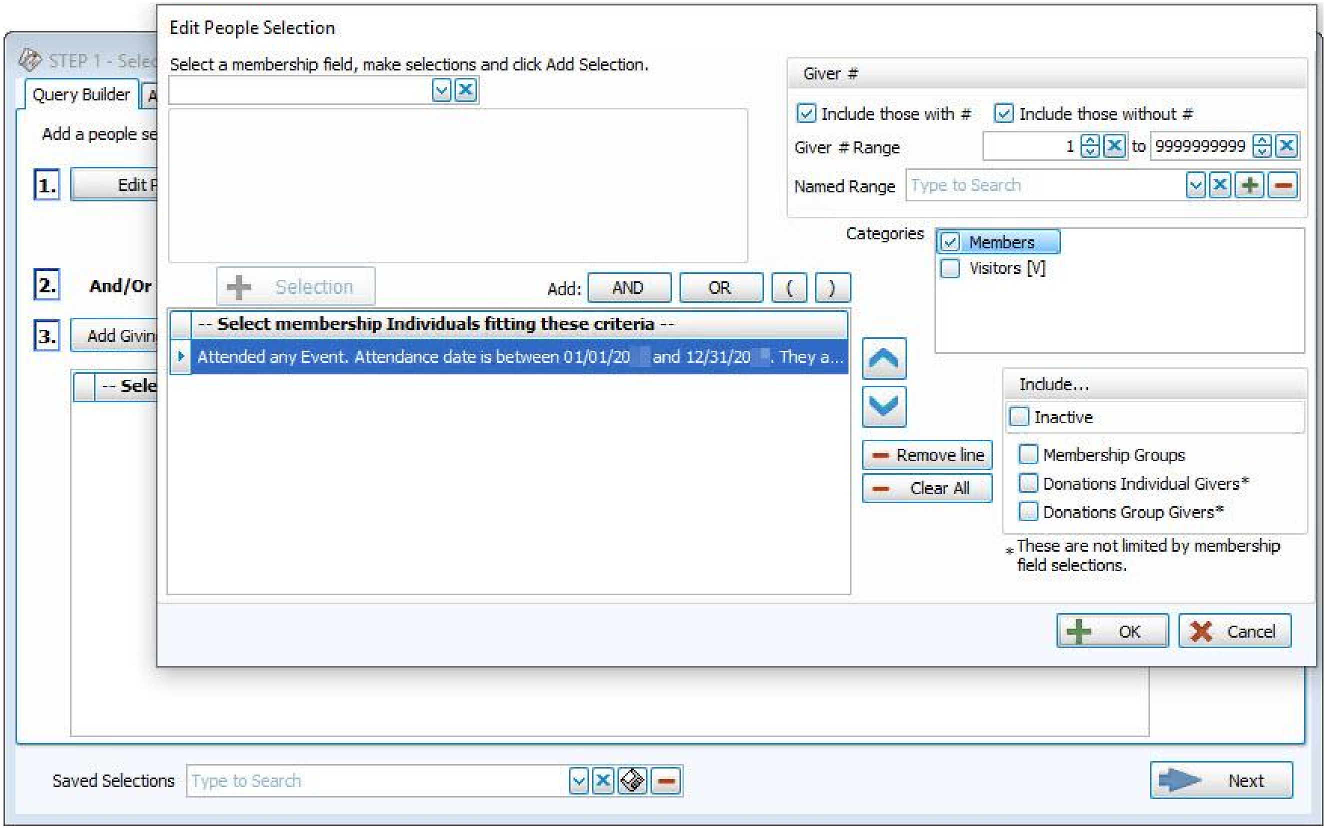


- You will see a list below of defined **Events**, you can check any you would like to run the report for.
- In the **Date Range** fields, type in the dates you want to run it for, or a single date if preferred. Lets run this for all three services last year: January 1 through December 31
- In the **Times Attended** fields, type in 0 thru 0. It should look like this:



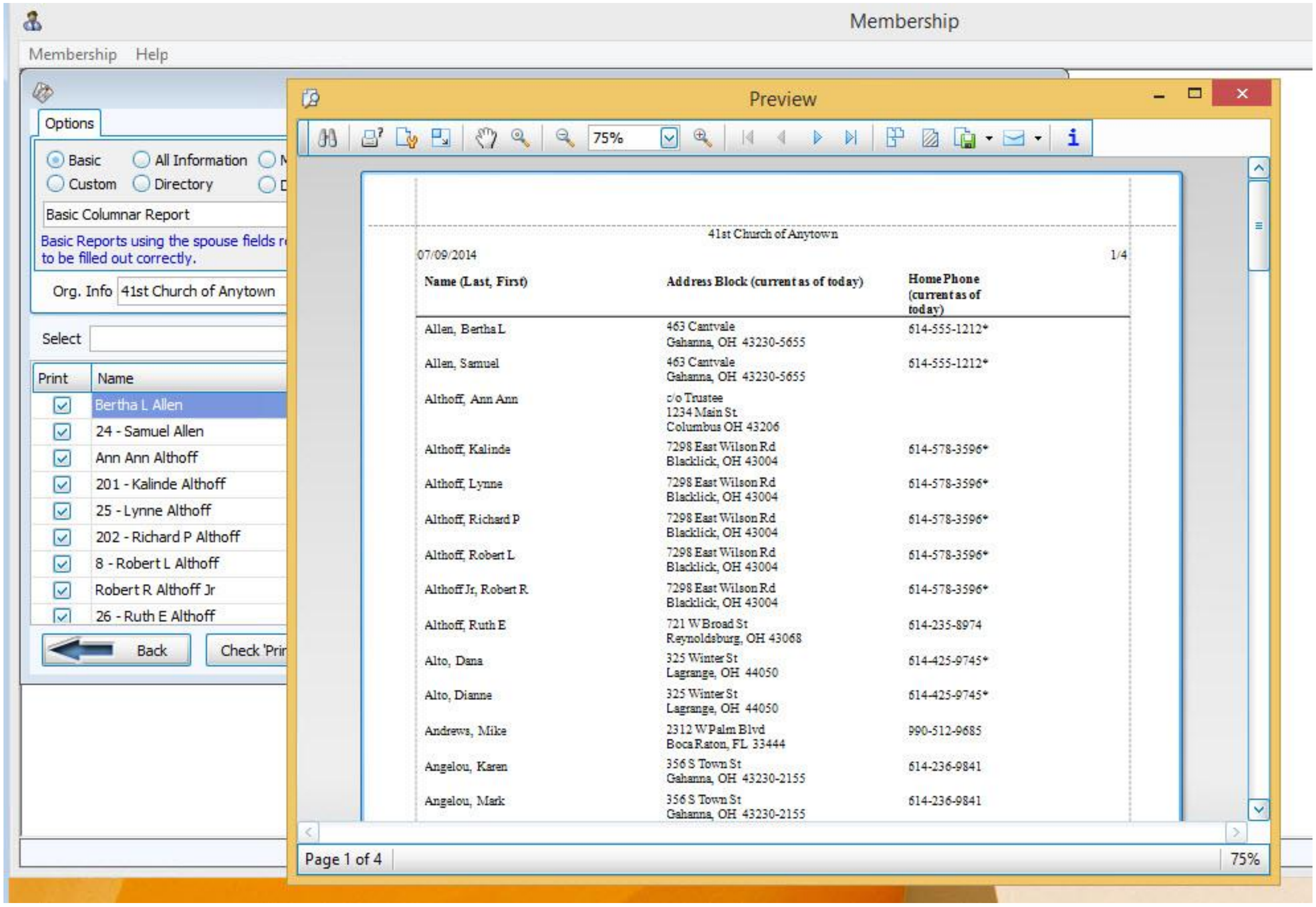
- Click **+ Add to Selection** to close this options box.

- You will notice that the box below now has the criteria you just chose:



- Click the **OK** button to return to **Step 1**
- When you're finished, click the → **Next** button.
- Here you will see the Step 2 — Select the report layout/format screen.
- Again, there are many options available here to use to customize this report that are discussed elsewhere, but for this exercise, just click on the **Print** button to get your **Print Preview** *(pg 20)*.

- This gives you the list of active members who have not attended any of the services selected for the whole year:



Family Categories

In Church Windows **Membership**, your members and visitors are stored together in The People File and each family is assigned to a **Category**. The software comes with the standard Categories of **Members** or **Visitors**. Additional Categories can be added as needed. In each Category, a family is created and individuals are put into The Family Record.

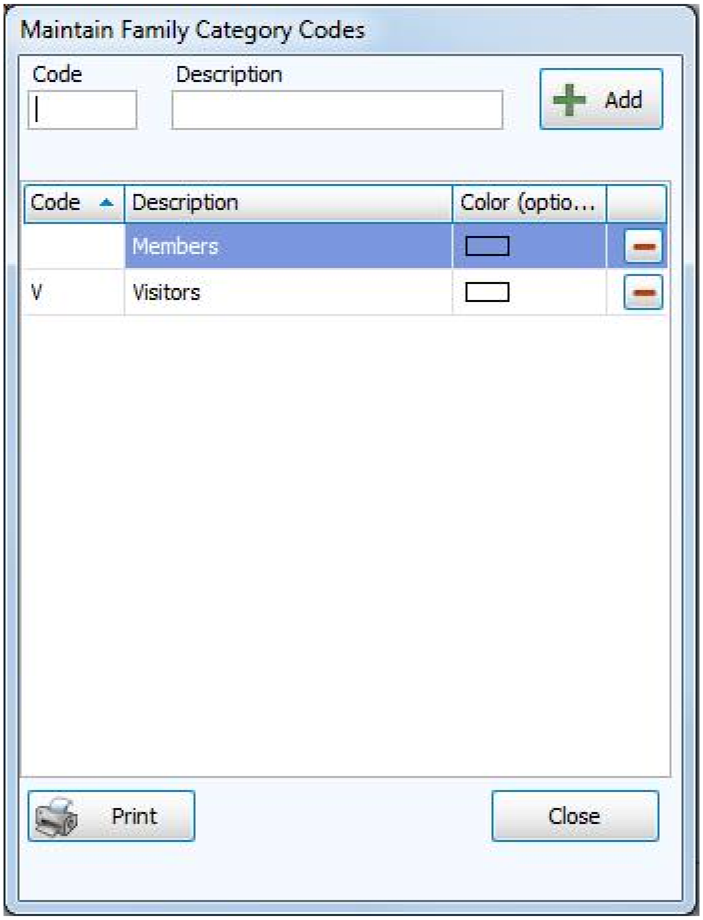
- You can easily reassign the **Category** of households. So when a family begins attending your Church, you can create their family and individual records in the **Visitor** Category. Then when they join the Church as members, that family and all of its members can be reassigned to the **Member** Category.
- Likewise, a family can belong to your Church and thus be entered into the **Member** Category. They move away but would like to continue getting mail about the Church. You can easily reassign that family and all its members from the **Member** Category to the **Visitor** Category or, perhaps, a new **Category** called "Former Members".

- It is possible to use Church Windows and never use the Categories. Some Churches use only the **Member** designation and use the **Status** field to differentiate between members, visitors, etc.
- For ease in reporting, we do recommend that you use these Categories to differentiate between Church members, those non-members who are actively involved in the Church, and people who merely visit.
- You might also enter a new **Category** for those Churches or other businesses whom you regularly contact. The flexibility of Church Windows allows you to decide how you will use the Categories to keep organized (see below).
- Colors can be selected for each **Category** to change the background of the records for an easy visual differentiation between Categories when viewing The People File.
- Reports / Directory / Exports can be written to include multiple groups and reports can be created for just one group.
- Using the Find Function, you can pull up a certain set of people, you can create a directory that includes one **Category** or but not the other(s), or you can create a directory that includes multiple Categories.

Add New Categories

- From The Initial Portal of Church Windows choose Membership
- Open The People File
- On the **Family** side of the screen (left), click the **Edit** button next to the **This Family's Category** dropdown menu.

- This will open the **Maintain Family Category Codes** dialogue box:



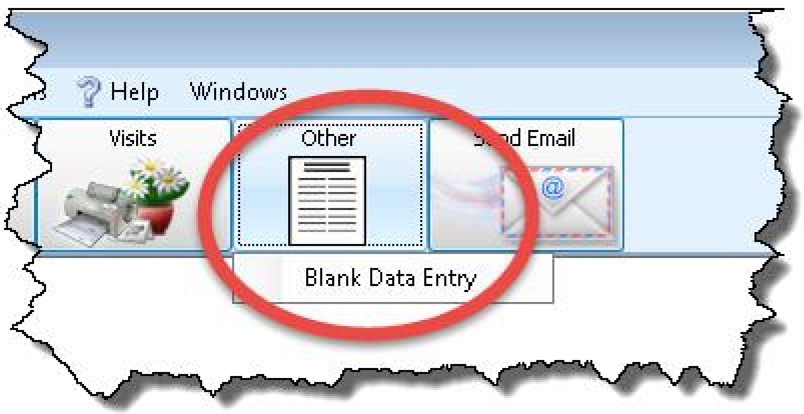
- To **add** new Categories:
  - Enter description and, if desired, a code and a color.
- To **edit** current Categories:
  - Simply make the desired changes to any of the columns for that **Category** (code, description, or color).
- To **delete** current Categories:
  - Click the **Delete** button at the end of the row (you *must* have at least one Category).

Blank Data Entry Form

Church Windows has the capability to print blank reports that include **Membership** information that would be excellent tools for data collection before Entering Membership Data *(pg 53)*. You could print a **Family** report and an **Individual** report, photocopy them, and hand them out to your congregation. They could fill in the reports and return them to the Church office so that you could then update their records in The People File. These forms might also be handy to collect information from new members as well.

To view or print the Blank Data Entry Form :

- From The Initial Portal of Church Windows choose **Membership** *(pg 29)*
- Click **Reports/Export** in the **Button Bar** at the top of the screen.
- Choose **Other**
- Click **Blank Data Entry Form**:



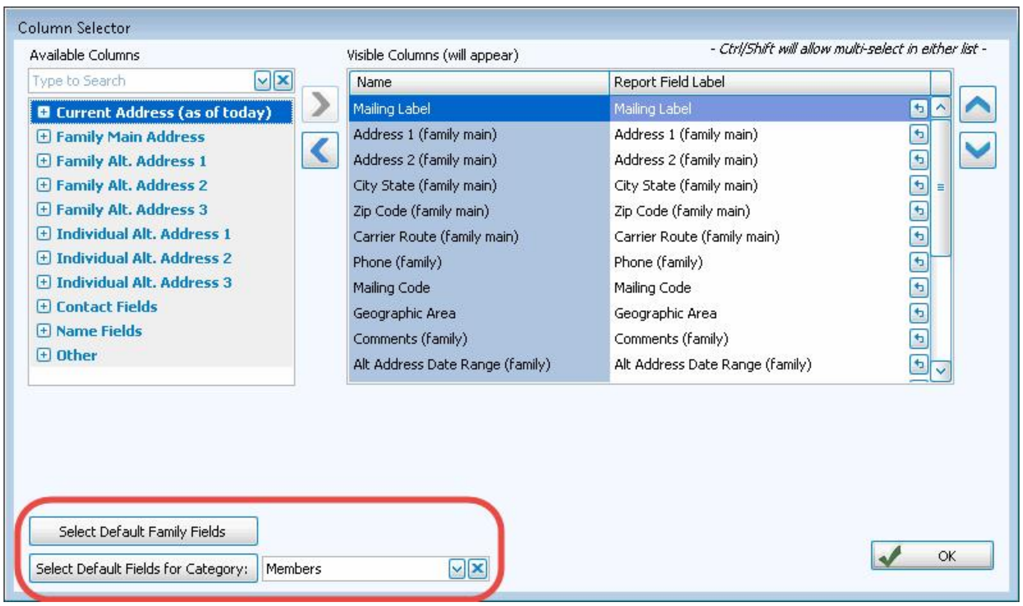
- The **Blank Data Entry Options** screen will appear:

Blank Data Entry Options

- The preset **[Template] Basic Blank Data Entry** form layout includes all of the Family Record Fields, click **Print** to view a **Print Preview** *(pg 20)*.
- You can create your own layout and select the fields that will appear on the form by clicking **New**:

New Layout

- Enter a report name and click OK.
- On this screen, you may select either the **Family** report or the **Individual** report layout. With each option, you also have the option to include or omit the other fields in The Family Record or The Individual Record.
- The Column Selector should appear:



  - To browse the **Available Columns**, click the to expand a group of fields or use the "**Type to Search**" dropdown box to find a particular column.
  - You can either highlight the column and use the left and right arrow buttons to bring it back and forth, or double click on it to move it to the opposite side of the screen.
  - Use the up and down arrow buttons to rearrange the order of the columns.

- The buttons in the bottom left of the **Column Selector** will automatically select the fields for designated groups of records:
  - **Select Default Family Fields**
    Will add all the fields showing on The Family Record (or left side of the screen) in the order they are listed in the actual records.
  - **Select Default Fields for Category:**
    Will add all the fields showing on The Individual Record in the **Family Categories** *(pg 47)* selected from the dropdown in the order they are listed in the actual records of The People File.
- Use care when selecting fields to be included on the form. If your people will be filling out these forms themselves, some of the fields may not make sense to them because they may not know what to fill in.

> For example, people likely will not know what Directory/Report Order is used for. Inactive Date and Reason should typically be excluded from this form as well, since the people who will be filling out these forms wouldn't be inactive people.

- Underneath the **Visible Columns** on the right is a space for the "**Report Column Header**". You can edit this text to label that field differently on your printed / exported report without changing the actual column name in the database.

> For example, you could remove "(family main)" from the Address fields' Report Column Headers.

- Click **OK** once you have selected the fields.
- Click **Print** to see the report.
- Once you have created new layouts, you can click the dropdown button at the end of the layout line to select the desired layout.
- To delete a layout, select the layout name then click the **Delete** button at the end of the line.
- To alter the fields you chose, click **Select Fields** to reopen the Column Selector.
- Clicking the **Edit** button will bring up the Report Designer showing the layout of the name selected prior to clicking **Edit**. Here you can make detailed changes as to where and how things appear on the layout. It will rarely be necessary to use this option for these reports.

- **Organization**

  Unless otherwise specified, your Church name will appear at the top of the report as you initially entered it into the **Organization Info** *(pg 185)* stored in **System Information** *(pg 184)* in the **Administration** *(pg 178)* area of Church Windows.

  If you need to create additional sets of **Organization Information**, click the **Add** button. Or, select an existing name from the **Org. Info** box and click either **Edit** to change it or **Delete** to remove it from the list.

- If you would like to show each of the different choices for the List fields on the blank data entry form, put a check in '**Include List Field Choices**'.
- Once you have made all of your selections, click **Print** to view a **Print Preview** *(pg 20)* and then proceed in sending the file to your printer. You can also Export most reports and/or Send via Email as a file to be used outside of Church Windows.

If you have already begun **Entering Membership Data** *(pg 53)* into Church Windows, then the program can print similar reports to hand out to your members, but one which includes any existing Church Windows data and leaves blanks to fill in the missing information, this is called the **All Information** *(pg 62)* report. That way, you can have people check your existing data for accuracy and fill in the blanks for you.

Entering Membership Data

To get started in Church Windows **Membership** *(pg 29)* as quickly as possible, we suggest that you begin by entering just the basic information into The People File. That way, you can begin to use the system to print Reports / Directory / Exports, and perform other time-saving tasks while continuing to collect and enter more detailed information about each person or family.

The bare minimum information fields that you should fill out in each person's record are as follows:

Family Record Fields:

- **Mailing Label**
- **Address**
- **City State**
- **Zip**
- **Main Phone**
- **Mailing Code**

Individual Record Fields:

- **First Name**
- **Last Name**
- **Giver Number**
- **Include on Directory**
- **Directory/Report Order**
- **Family Relation**

Other information that would be helpful to enter if you have it handy, but is not required to run the system, includes **Status Code**, **Birth Date**, and **School Grade**.

Add a Family

- Even if you are only adding a single person, you must first add a Family record for them.
- Click the **+ Add Family** button.

- First, a window will pop up where you must choose one of the **Family Categories** *(pg 47)* from the pop-up window (e.g. Members or Visitors or a custom category) and click the **OK**:

If needed, click the **Add/Edit Family Categories** button in the bottom left to **Add New Categories** *(pg 48)* or edit existing category names, codes, or colors.

Note:

Once you select a category, you will have the option of saving that Category as the default Category for new Families by checking the box that appears. This setting is specific to each of your ***Users*** *(pg 189) and can be changed at any time in Membership Settings.*

- Then you will fill out the Family Record Fields, staring with the **Mailing Label** field. Enter the family name as you would like it to appear on Labels.

Examples:

Mr. and Mrs. William Smith

Ms. Joan Thomas

Casey and Dana Miller

The Jones Family

- Continue to enter the rest of the Family Record Fields information on each of the Family information tabs.
- You must click the Add button to enter the **Addresses**.
- When you have finished entering Family information, then you are ready to click the Add an Individual button and fill out the Individual Record Fields.

Note:

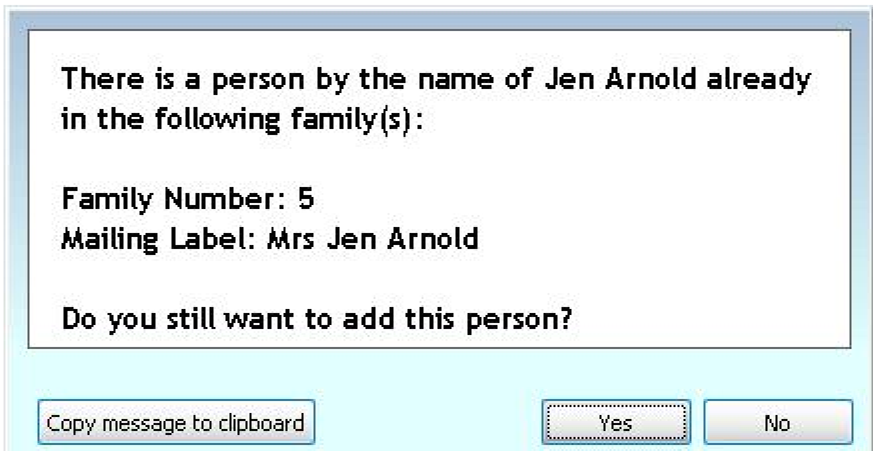
Family records may exist without any Individual records, although you don't want to do this. Make certain every family has at least one person in it to avoid potential problems.

- Switch to The Individual Record to enter individual information.
- The cursor should be in the **First Name** field. If it is not, then click this field to bring the cursor there. Enter that person's full first name in this field.
- Continue entering that person's Individual information.
- When you have finished entering that person's Individual information, click the **Save** button. The Family Record will be assigned a five-digit Family Number, while The Individual Record will be assigned an Individual Number, which is the Family Number plus a "-1" extension. The Family Number may not be changed and, if this record is deleted, the number will not be reassigned. In the Individual Number, you may only edit the extension.
- After you save the Family and/or Individual information, a box will appear, giving you the option to add a new Family record, add another Individual to the current Family, or to exit the Add mode altogether. Click your choice to continue.

Add an Individual

- Make sure that The Family Record that appears on the screen is the Family that the new person belongs to. If the appropriate family/individual record is not open, bring it to the screen using **Person Lookup**, the **Prior** and **Next** buttons, or Using the Find Button. If the family is not yet in the database, first Add a Family, even if you are just adding a single person they *must* have a family record.
- Click the **+ Add Individual** button.

- Enter that person's Individual information.

> **Note:**
>
> *If you enter a **First and Last name** which are exactly the same as an existing person in your database you will receive a warning including the **Family Number** and Mailing Label of the existing person. It will ask you to confirm if this duplication is intentional. For example:*
>
> 
>

- The information you enter will save automatically when you navigate elsewhere, however, you can also click the **Save** button.
- Click **Cancel** to discard your input.
- To add another individual to this Family, select **+ Add Individual** again, or select **+ Add Family** to Add a Family.

> **Note:**
>
> *It is possible to Transfer Individual(s) or Link another child to this family. There is **never** a need to create a new record and delete the old one nor create multiple records for the same person.*

Beginning with Converted Data

Many new customers have switched to Church Windows from another software program. In some cases, our conversion staff can convert your existing **Membership** *(pg 29)* data into Church Windows for you. Conversion prices vary based on the format of your old data.

> ***Note:***
>
> *For questions about converting data from another program into Church Windows, please call 800.533.5227 or email cwdataconversion@gmail.com.*

If you have sent your data in to us for conversion, you should receive a letter from our conversion staff that includes instructions on how to install your new data as well as extra information concerning your specific situation. Please read this information carefully as conversion results vary not only by the original format, but also from Church to Church.

Data is processed in the order that ensures the smoothest, most accurate conversion possible. New conversion customers often notice that their family numbers do not flow alphabetically. This is not something to be concerned about, since you can get any reports and lists in alphabetical order at any time, and you may view your data in alphabetical order Using the Find Function.

Please remember that data conversion is not an exact science. Because different software programs use different kinds of data formats, there will *always* be some "cleaning up" for you to do once you have your data in Church Windows. During a data conversion, there is a pattern to how data comes over into Church Windows format. You can usually recognize the pattern in the first few families and know that the rest of your families will be similar. To follow are some suggestions on how to check and correct your data, but please be sure to read the earlier sections of this manual as well. It is important to be familiar with Church Windows fields and how they are used within the program.

Tools to help review converted data

Print Selected Data and Review

It might be a good idea to print an All Information *(pg 62)* report for a handful of people and then check the data, looking for patterns.

- From The Initial Portal of Church Windows choose **Membership**
- Click **People**
- Click **Find**
- Then click **Find** again in the pop-up window without selecting any criteria

This will bring all individual records to The Find Grid, sorted in alphabetical order. Typically, this report will be a bit more helpful if we Group and Sort the Find Grid Records primarily by **Family #**, then by **Individual #** within that, so individuals will be together with their other family members and in the order in which they appear in the family.

To sort the people and fields on the Grid in such a way:

- Click the **Columns and Sorting** button at the top of the Grid.
- The Group & Sort tab allows you to set the sort order using up to three fields.
- The columns tab determine what information will be displayed on the Grid.
    - The list on the right contains the fields that appear on the Grid.
    - The list on the left contains all the available fields.
- Find the field(s) you would like to view either double-click, or click and click the right button to bring that field to the list on the right.
- Now do the same for any additional fields. (You can use the **SHIFT** and **CTRL** keys to add or remove multiple fields simultaneously.)
- Click **OK** to return to the Grid.

To print out the information:

- At the top of the Grid, click the **Print Grid** button.
- Make any necessary changes to the options.
- Click **Print**. The report will compile on the **Print Preview** ***(pg 20)*** screen.

The first 3 or 4 pages of this report will probably be enough information for you to get an idea of how your data converted. Take a look at the information on this report, paying special attention to these fields: **Mailing Label**, **Envelope #**, **Status Code**, **Family Relation**, **Include on Directory**, **Directory/Report Order**, and **Mailing Code**. Typically, you can recognize patterns by looking at these first few families.

When you are checking the **Include on Directory** and the Directory/Report Order field, keep in mind that during a conversion, usually everyone gets an entry here. There may be cases when family members get the wrong code in the conversion, and the codes may need to be reassigned.

Make Changes

There are quite a few tools available in Church Windows that will help you make any necessary changes to your data in Individual Record Fields and Family Record Fields. If you find something that needs to be changed in many records in the same way, then **Mass Edit** may be helpful (see below or, for a specific example, see Mass Editing Area Codes). There may also be situations where individual records have been entered in the wrong family. In this case, then the **Transfer Individual(s)** function would be helpful.

Mass Edit Converted Data

Mass Edit will edit the information in one field in the same way on many records at once, saving the time of viewing and editing each record individually. To accomplish this change, all you need to do is to tell Church Windows which field you would like to change, what information you would like to take out or replace (if any), and what the new information should be.

To have Church Windows find every record during its search, then enter the **Mass Edit** from The People File. For Church Windows to search through and change information in only a certain group of records, then perform a **Find** to get this certain group displayed in The Find Grid, and then click **Mass Edit** from the Grid. For an even more select group, then highlight certain records on the Grid, and only those records will be changed in the Mass Edit.

List Field Codes

First, check the definitions for all of the codes in any **Field Types** that contain converted data. On anyone's record on the People screen (click **Membership**, **People**), one-by-one, check all of your List fields on both The Family Record and The Individual Record (especially Directory/Report Order, **Mailing Code**, **Status**, **Family Relation**, etc.). This will bring up that field's available codes and definitions. Some definitions might be "unknown" or something similar, but you can change them to the correct definition. To change them, click **Edit Items**, click the definition(s) you would like to edit, and make your changes. Click **OK** when you have finished editing, then click **Close** to close that list box.

Transfer Individual to Another Family

There may be times when an individual record should be moved from one family to another.

- The individuals whose records you would like to transfer must be on the screen in The People File.
- Then click **Transfer Individual**.
- The **Transfer Individual(s) screen** will appear.
- On the left side, select the individual that needs to be moved to another family.
- On the right, select **Existing Family** and choose which Family, or **New Family**. Then, either type in the new Family information or paste in the Current Family Information.
- Then click **OK** to make the transfer final. All of the information in this individual's record will move with them to the new family, including attendance, visits, and contributions.

Printing Reports for Your Members to Update

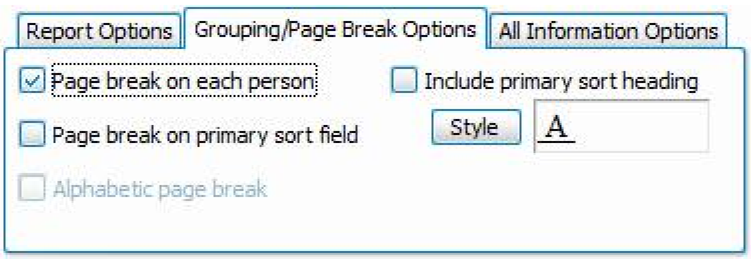
Once you have your data cleaned up a bit, you might want to print out all of the information you have in Church Windows for each person so that they can check for accuracy and add any missing information. We have a pre-pared report to help you do this efficiently.

All Information

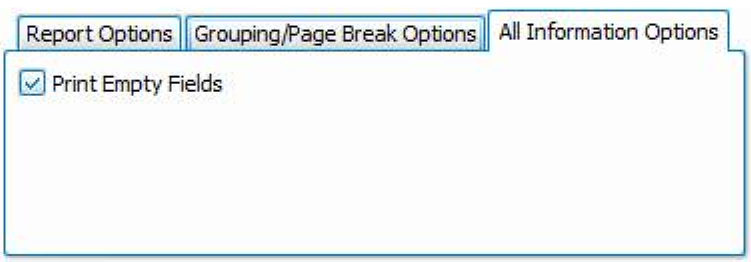
To print a report for each person / family that lists all existing information in their record and leaves blanks for them to fill in missing information:

- From The Initial Portal of Church Windows choose **Membership**.
- Click **Reports/Export** in the **Button Bar** at the top of the screen.
- Click **Reports & Labels**.
- Then choose **Reports / Directory / Export**.
- The **Step 1 — Select who should appear on the report** screen will appear.
    - Clicking → **Next** without entering any Membership criteria to get all people in the database, or click the People Selection Criteria to enter Membership search selections (and/or the Giving / Pledging Selection Criteria, etc.) to limit whose records you will print.
    - On the **Sort tab** choose **Family #** for **Sort Field 1** to list everyone in the family sequentially or choose **Name** for alphabetical order. When you're finished, click the → **Next** button.

- On the Step 2 — Select the report layout/format screen, select **All Information**
  - We recommend using a template which includes **Family Information** so that each person can confirm their correct family and mailing address.
  - If you'd like to include Alternate Addresses on these reports, add the **Alternate Address** field in the Column Selector, as well as any other fields you'd like to add.
  - In order to have the system print the reports on separate pages so you can give each family their own report, click the **Grouping / Page Break Options** tab at the top right. Place a checkmark in the **Page break on each person** box:



  - In the **All Information Options** tab at the top right corner, mark the box to **Print Empty Fields:**



- Once you have made all of your selections, click **Print** to view a **Print Preview** *(pg 20)* and then proceed in sending the file to your printer. You can also Export most reports and/or Send via Email as a file to be used outside of Church Windows.
- Keep in mind that since this report will include everyone in The People File, then it may take a while to compile.
- It will include a separate report for each person, printing all existing information about each person, and leaving blanks for the people to fill in any missing information.
- Distribute these reports to your parishioners, and update your Church Windows system accordingly with the new, updated information they give you!

Chapter 3 - Scheduler

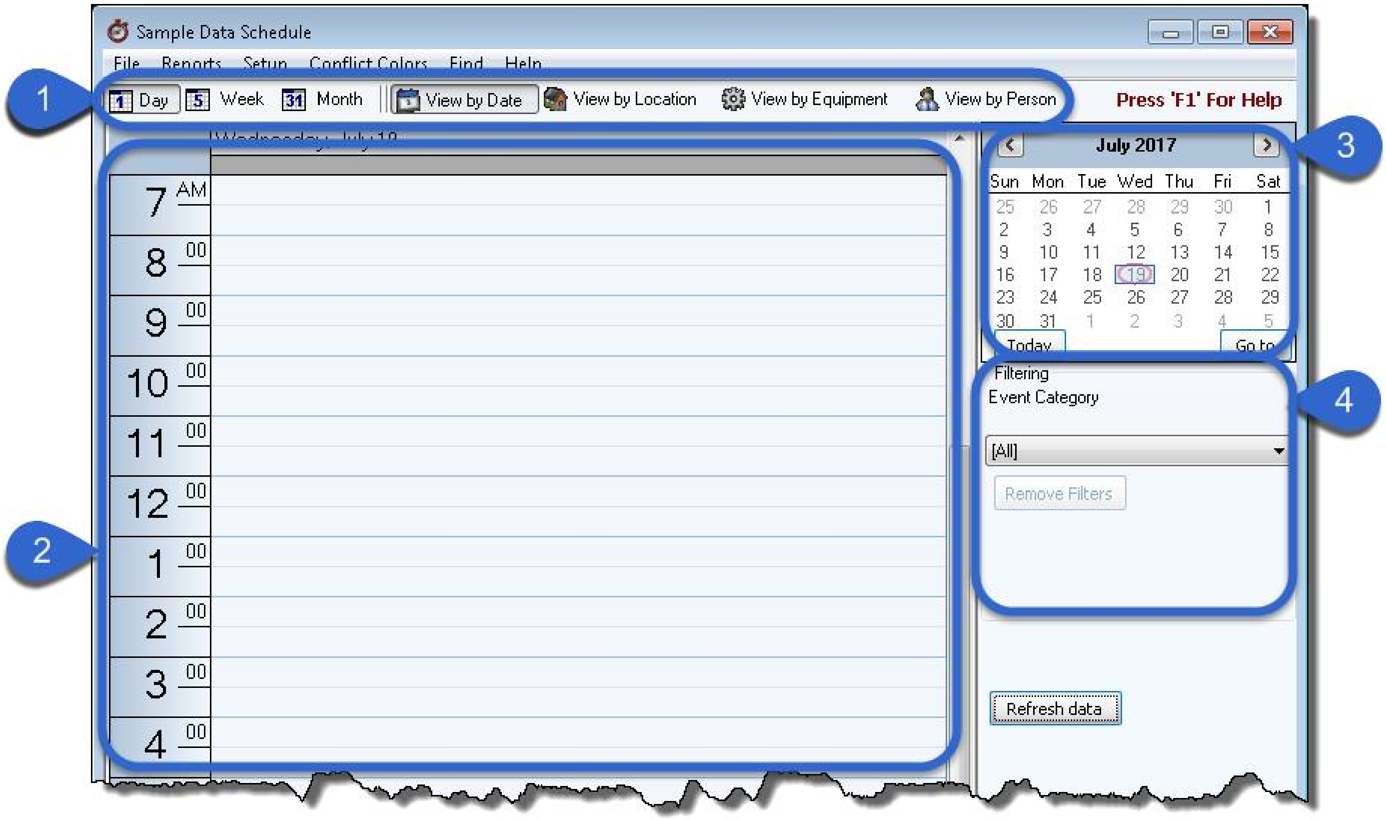
Scheduler

The **Scheduler** Module of Church Windows is a program that will allow you to schedule meetings or events. Some of the functions of the **Scheduler** Module include:

- Record details for each event such as: **date, time, Locations** ***(pg 69)*****, Categories** ***(pg 78)*****, Equipment** ***(pg 73)*** **needed, and People** *(pg 66)* **involved**.
- Links to The People File in the **Membership** Module to assign people **Duties** *(pg 76)* for the scheduled meetings or events.
- View events in various ways, such as **View by Equipment** *(pg 87)* or **View by Person** *(pg 88)*.
- The program will also notify you of Conflicting Events, such as when needed equipment is already scheduled to be used somewhere else.
- Exporting Events to vCal format which can then be imported into Outlook, Palm Desktop and other calendar programs.

Overview of the Scheduler Screen

- From The Initial Portal of Church Windows choose **Scheduler**
- The **Scheduler Main Screen** *(pg 82)* will open as follows:



There are 4 sections to the Scheduler Main Screen *(pg 82)*:

1. The bar across the top contains options to choose what you would like to display. You can click back and forth between them to **View by Date** *(pg 84)*, **View by Location** *(pg 86)*, **View by Equipment** *(pg 87)*, or **View by Person** *(pg 88)*.

2. The left half of the screen is a grid. You can begin Creating an Event directly on the grid.

3. The upper right section of the screen is a calendar. The default view is the current month but you can change this in Scheduler Options. Today's date will be circled in red on the calendar. If you are on a day or week view, the date(s) being displayed on the grid will be shaded in blue on the calendar.

4. The bottom right section of the Scheduler Main Screen *(pg 82)* is the **Filtering** *(pg 91)* section, which allows you to limit the event **Categories** *(pg 78)*, **Equipment** *(pg 93)*, **Locations** *(pg 91)*, or **People** *(pg 94)* that appear on the display. The default filter is **All**.

About Scheduler

To utilize all of the features of the **Scheduler** Module, you must first enter certain information about the **locations**, **equipment**, and **people** to be scheduled. Once entered, you will be able to restrict what displays on the Scheduler

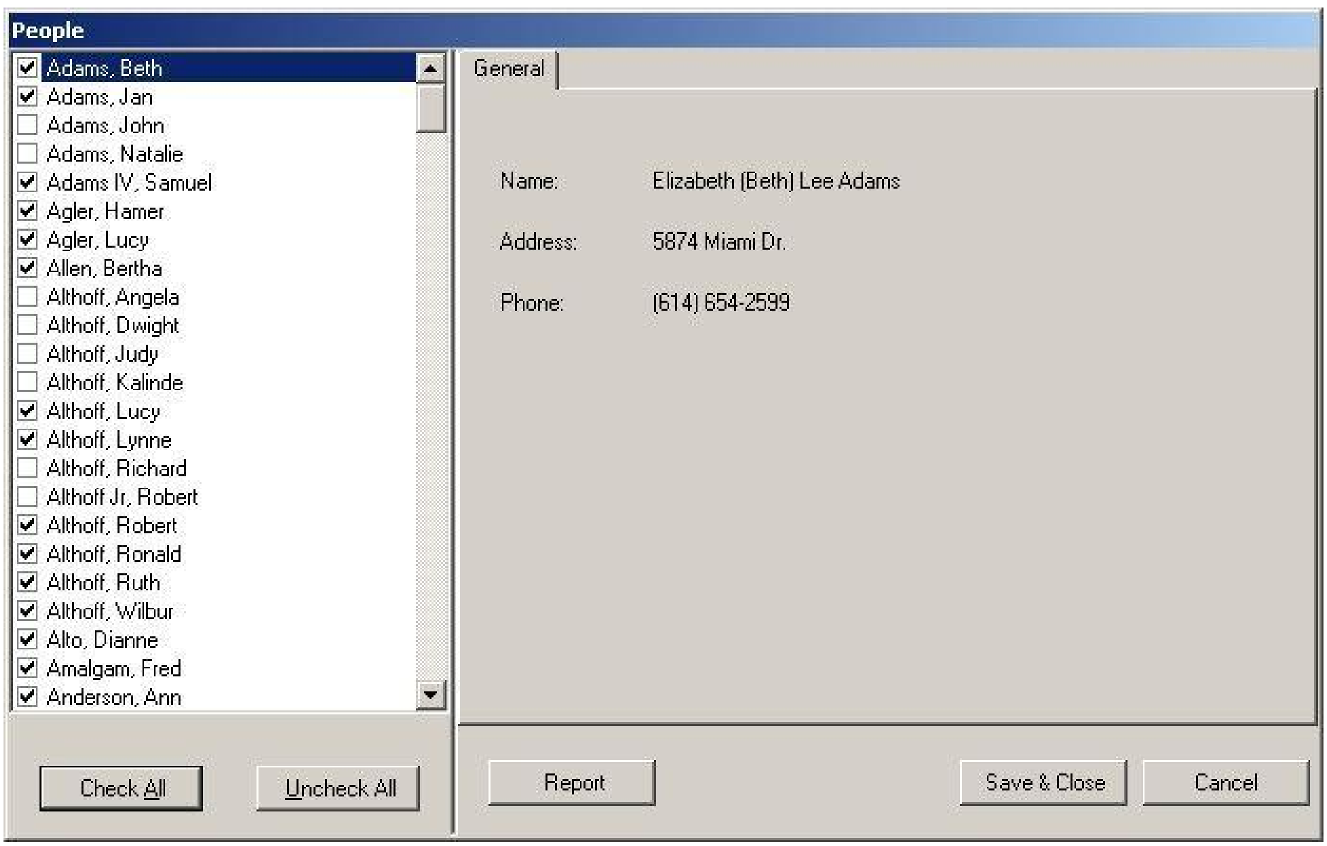
Main Screen *(pg 82)* and Reports to certain categories, piece of equipment, location or person. All of these are optional and you can modify these settings and any other Scheduler Options at any point.

People

Identify the individuals available as contacts. The **Scheduler** Module is linked to The People File in the **Membership** Module. People who are included in the **Membership** Module can be scheduled as contacts for an event, a location or a piece of equipment. They can also be assigned duties for a specific event.

__Select the people available as contacts__:

- Click **Setup** from the Scheduler Main Screen *(pg 82)*.
- Then click **People.**
- The **People** screen will appear:



- The left side of the **People** screen has a list of all the people that are included in the **Membership** Module.
- A checkmark in the box beside the individual's name indicates that the person is available for use in the **Scheduler** Module.

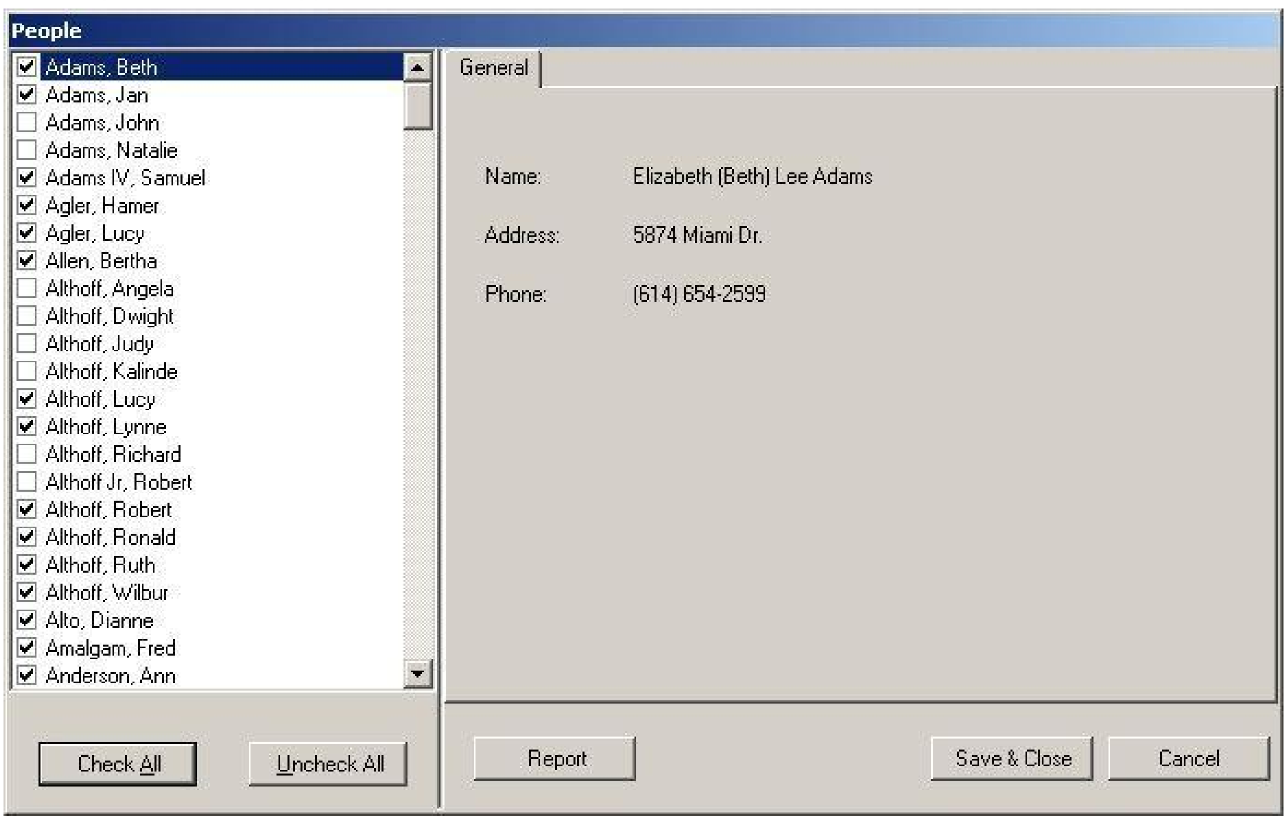
- Up to 1000 people may be marked as available in Scheduler.
- The **General** tab on the right side of the **People** screen shows:
  name, preferred name, street address, and phone number
- Any changes to the personal information shown will need to be made in the **Membership** *(pg 29)* Module.

Linking Scheduler to the Membership Module

All people in the Church Windows **Membership** database are potentially available for use in the **Scheduler** Module, and up to 1000 people may be marked to be available in **Scheduler**. An individual can be marked as available or deactivated for the **Scheduler** Module in either the **Scheduler** Module or the **Membership** Module:

From the Scheduler Module

- From The Initial Portal of Church Windows choose **Scheduler**
- Click **Setup**
- Click **People**
- The **People** screen will appear:



To activate an individual in Scheduler:

- Scroll to find the individual in the list on the left.
- Highlight their name.
- Click to put a ☑ checkmark in the box beside the name.
- To deactivate the individual, uncheck the box beside their name.

> ***Note:***
>
> *If an individual is currently assigned Duties (pg 76) or as a contact for an **event**, Locations (pg 69) or piece of Equipment (pg 73), the program will warn you that the individual is currently assigned. If you confirm that you want to remove the person from the schedule, then the person will also be removed from all **events**, **equipment**, or **locations** to which they are currently assigned.*

If you need to Add an Individual to the **Scheduler** Module who is not currently in your **Membership** database, you will need to add them to The People File in the **Membership** Module.

Once the individual is checked on the **People** screen, the **Show in Scheduler** box will be marked with a ☑ checkmark on The Individual Record in the **Membership** Module. If the checkmark is removed from the box beside an individual's name on the **People** screen, the checkmark will also be removed from the **Show in Scheduler** box on the Individual Record in the **Membership** Module.

From the Membership Module

- From The Initial Portal of Church Windows choose Membership
- From the **Quick Access Buttons** in the center of the screen, choose **People**
- If the appropriate family/individual record is not open, bring it to the screen using **Person Lookup**, the **Prior** and **Next** buttons, or Using the Find Button.
- Click to check the **Show in Scheduler** box on The Individual Record.
- The person will now have a ☑ checkmark beside their name on the **People** screen in the **Scheduler** Module.

If you need to activate / inactivate a group of people, you can use the Mass Edit feature of the **Membership** Module.

Click the **Report** button if you wish to print a list of the active people in the **Scheduler** Module. This report can also be printed from the Reports menu in the **Button Bar** at the top of the screen then clicking People Report.

Locations

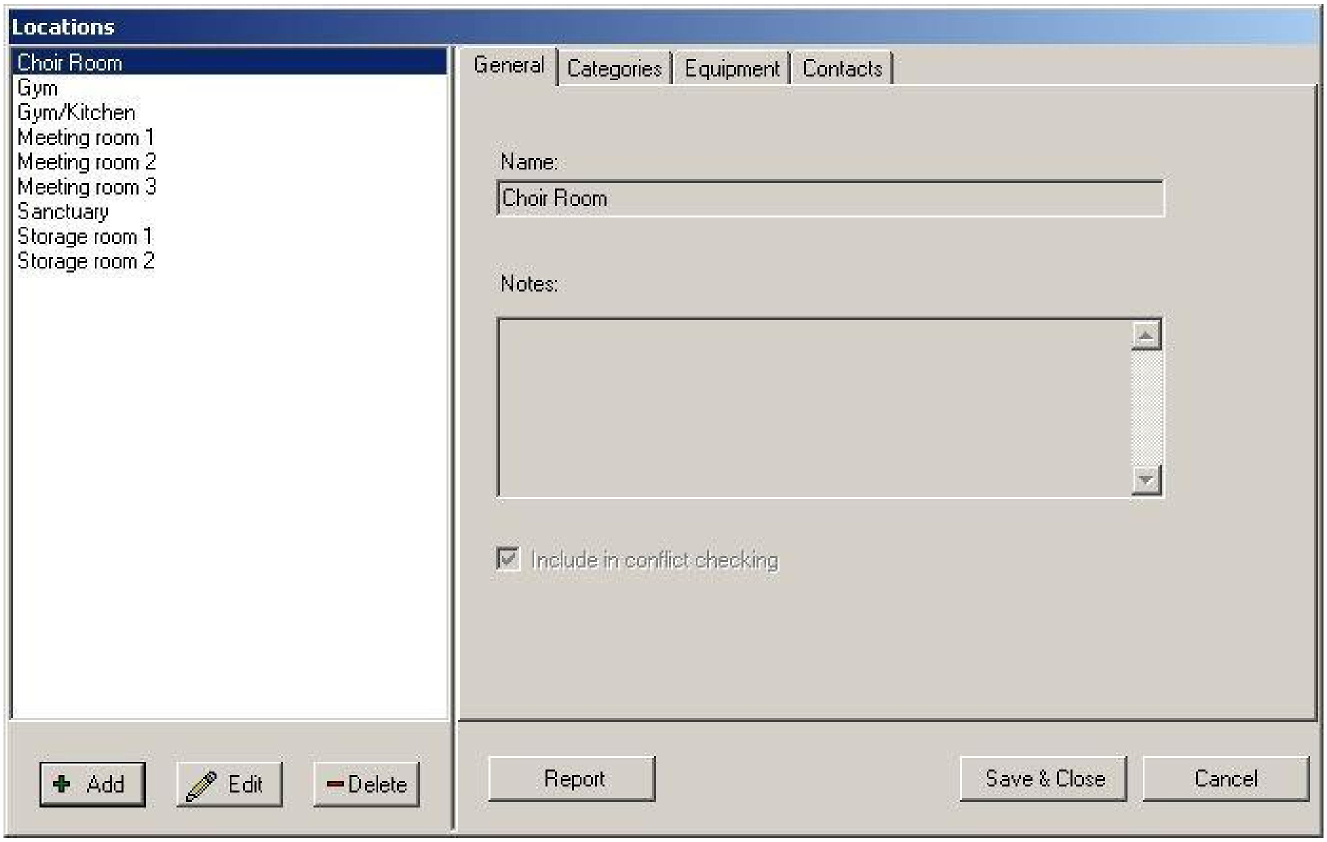
Identify the places to be tracked. The **Scheduler** Module gives you the option of scheduling specific locations. You can assign each location a contact who is responsible for the room, categories it belongs to, or equipment that is stored in that location.

> For instance, you may have a Fellowship Hall, a Sanctuary, and several classrooms you'd like to track.

To create, edit, or delete your list of locations:

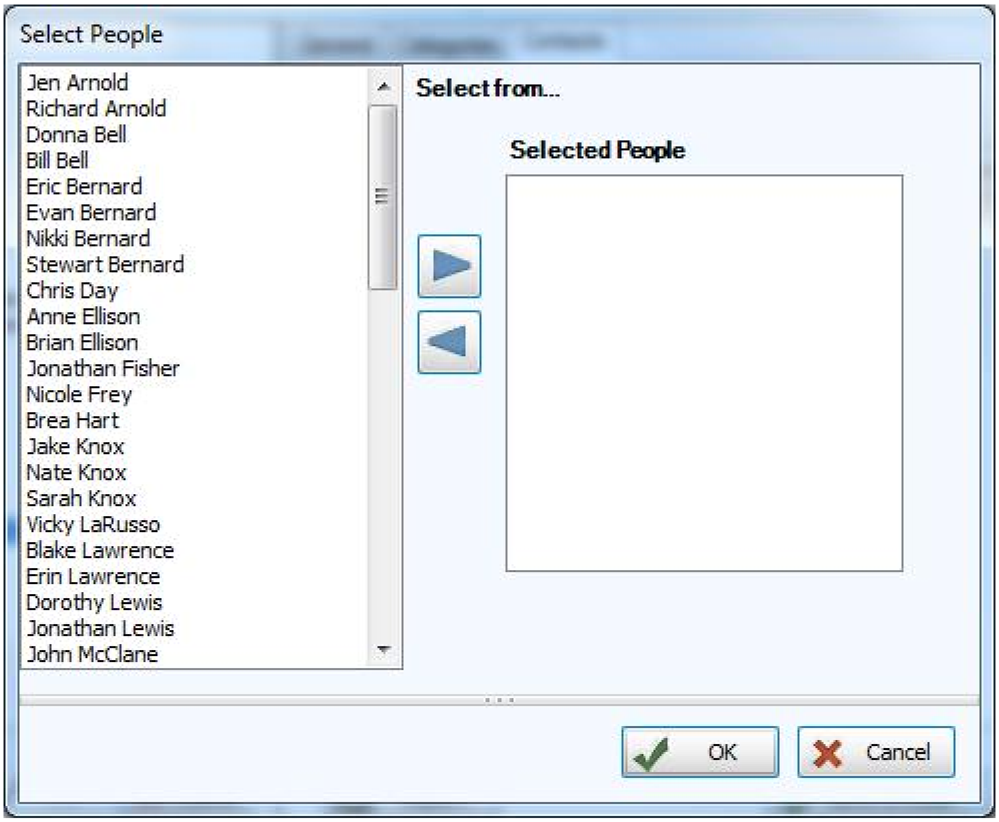
- Click **Setup** from the **Scheduler Main Screen** *(pg 82)*.
- Then click **Locations**.

◦ The **Locations** screen will appear:



- To **add** a new location, click **Add**
    - On the **General** tab:
        - **Name**
          Enter the name in the box.
        - **Notes**
          You may add any comments in the section.
        - **Include in conflict checking**
          Click to put a checkmark in the box if you would like the **Scheduler** Module to notify you if this has been scheduled for more than one event at the same time. Click to remove the checkmark if you do not want to be notified of conflicts. (The default is to **Include in conflict checking**.)
    - On the **Categories** *(pg 78)* tab:
        - There will be a list of categories that you can choose to assign.
        - Click to put a checkmark beside one or more pertinent categories, if needed.
    - On the **Equipment** *(pg 73)* tab:
        - Shows the equipment that has been associated with the highlighted location.
        - To change the equipment shown, go to Setup **Equipment** *(pg 73)*, highlight the equipment to be changed and click **Edit**.

  - On the **Contacts** tab:
    - You have the option of assigning People *(pg 66)* that are responsible for the location or equipment.
    - Click on the **Add / Delete Contacts** button to open the **Select People** dialog box:



    - Click the appropriate person to highlight their name and then click the right button to add that name to the **Selected People** list.
    - If you need to add an individual to the **Select People** list, go to **Setup** and click People *(pg 66)*.
    - Clicking on the left button will remove the name from the **Selected People** list.
    - Click **OK**.
    - The selected name(s) will appear in the box on the **Contacts** tab.
- To **edit** an existing location:
  - Highlight it and click **Edit**
  - Modify the existing information on the General, Categories or Contacts tabs.

- To **delete** a location:
  - Highlight it and click the **Delete** button.
  - The location will be deleted from the list.
  - You will be warned if you try to delete a location that has been used on events.
- Click the **Report** button to print a listing of the locations. This report can also be printed from the Reports menu in the **Button Bar** at the top of the screen then clicking Location Report.
- Click **Save & Close** to save your changes or **Cancel** to cancel all changes.

Equipment

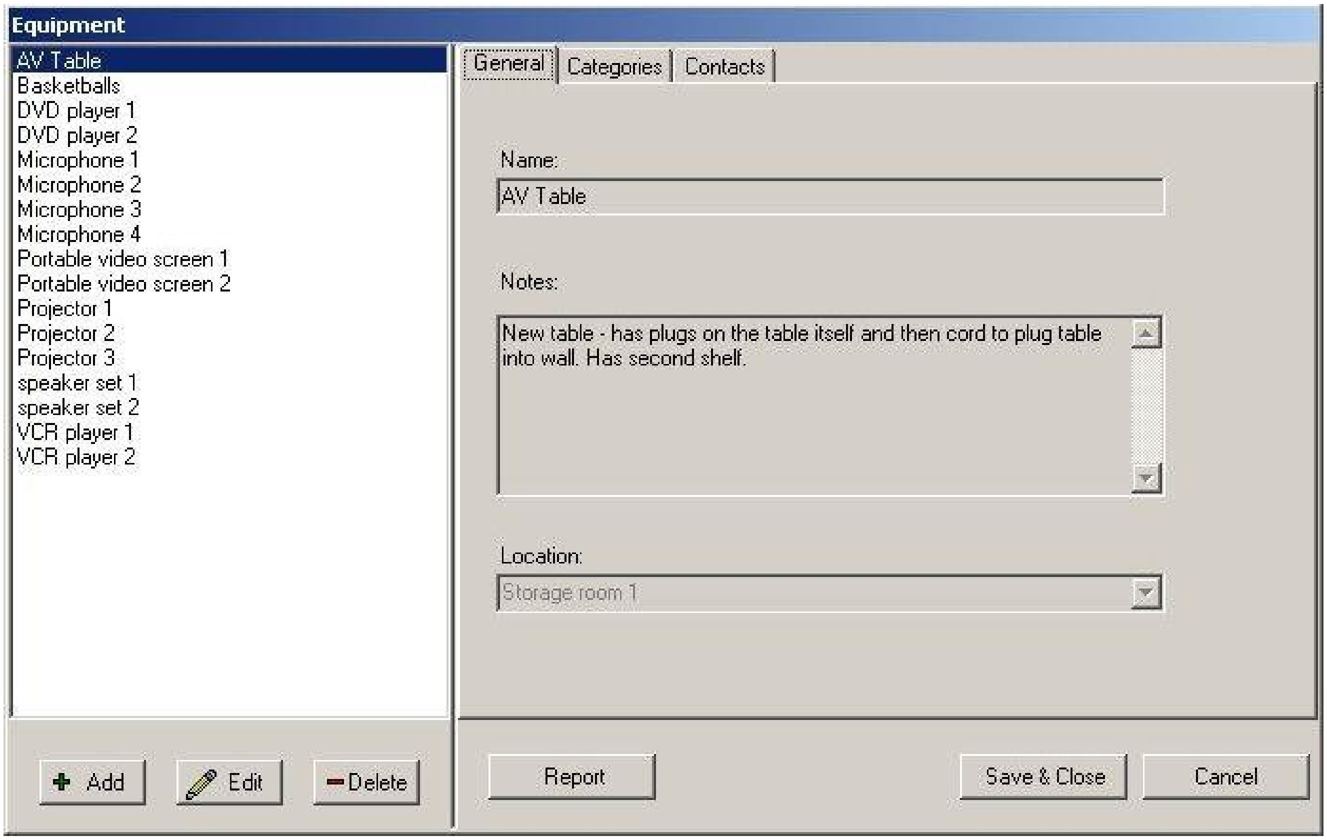
Identify the shared resources to be tracked. The **Scheduler** Module gives you the option of tracking equipment. You can assign each a location and a contact who is responsible for it. You can also indicate the categories to which that equipment belongs. For each event you schedule, you can also schedule the needed equipment.

> For instance, you may have a projector, a DVD player, microphones, etc.

To create, edit, or delete your list of equipment:

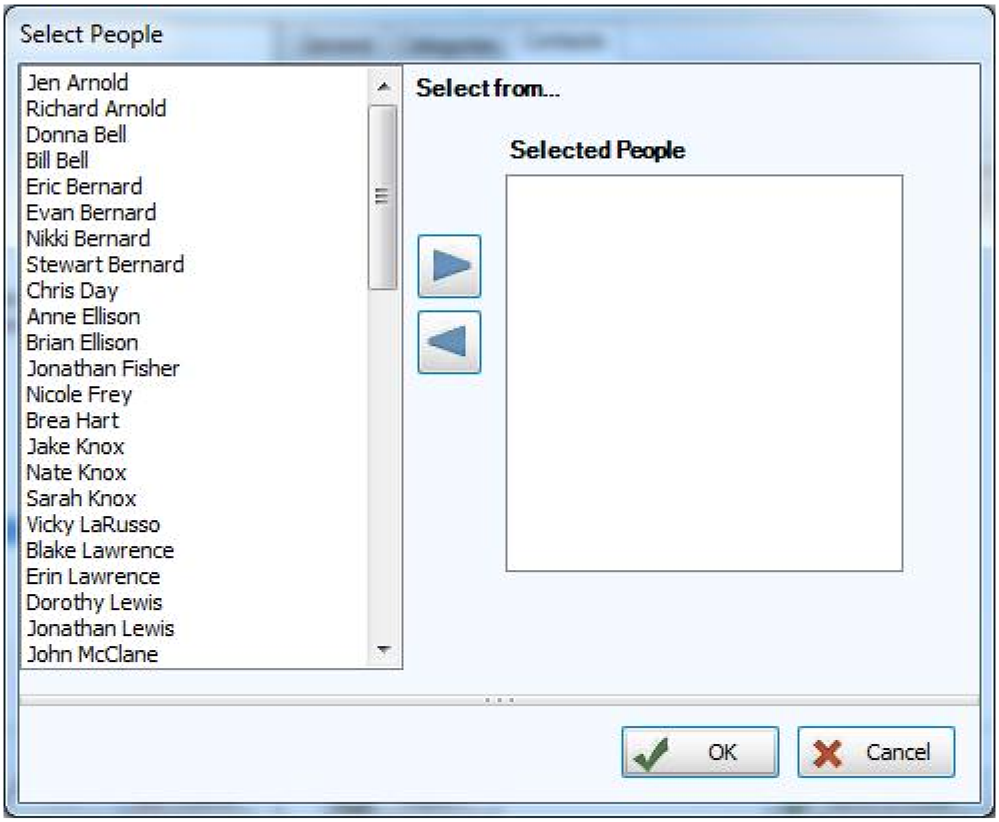
- Click **Setup** from the **Scheduler Main Screen** *(pg 82)*.
- Then click **Equipment**.

- The **Equipment** screen will appear:



- To **add** a new piece of equipment, click **Add**.
- On the **General** tab:
  - **Name**
    Enter the name in the box.
  - **Notes**
    You may add any comments in the section.
  - **Include in conflict checking**
    Click to put a checkmark in the box if you would like the **Scheduler** Module to notify you if this has been scheduled for more than one event at the same time. Click to remove the checkmark if you do not want to be notified of conflicts. (The default is to **Include in conflict checking**.)
- On the Categories *(pg 78)* tab:
  - There will be a list of categories that you can choose to assign.
  - Click to put a ☑ checkmark beside one or more pertinent categories, if needed.

- On the **Contacts** tab:
  - You have the option of assigning People *(pg 66)* that are responsible for the location or equipment.
  - Click on the **Add / Delete Contacts** button to open the **Select People** dialog box:



  - Click the appropriate person to highlight their name and then click the  right button to add that name to the **Selected People** list.
  - If you need to add an individual to the **Select People** list, go to **Setup** and click People *(pg 66)*.
  - Clicking on the  left button will remove the name from the **Selected People** list.
  - Click **OK**.
  - The selected name(s) will appear in the box on the **Contacts** tab.
- To **edit** an existing piece of equipment:
  - Highlight it and click **Edit**
  - Modify the existing information on the General, Categories or Contacts tabs.

- To **delete** a piece of equipment:
  - Highlight it and click the **Delete** button.
  - The equipment will be deleted from the list.
  - You will see a warning message if you are deleting a piece of equipment that has been scheduled.
- Click the **Report** button to print a listing of the equipment available. This report can also be printed from the Reports menu in the **Button Bar** at the top of the screen then clicking Equipment Report.
- Click **Save & Close** to record the changes or **Cancel** to discard any changes.

> ***Note:***
>
> *Equipment can also be added when Creating an Event.*

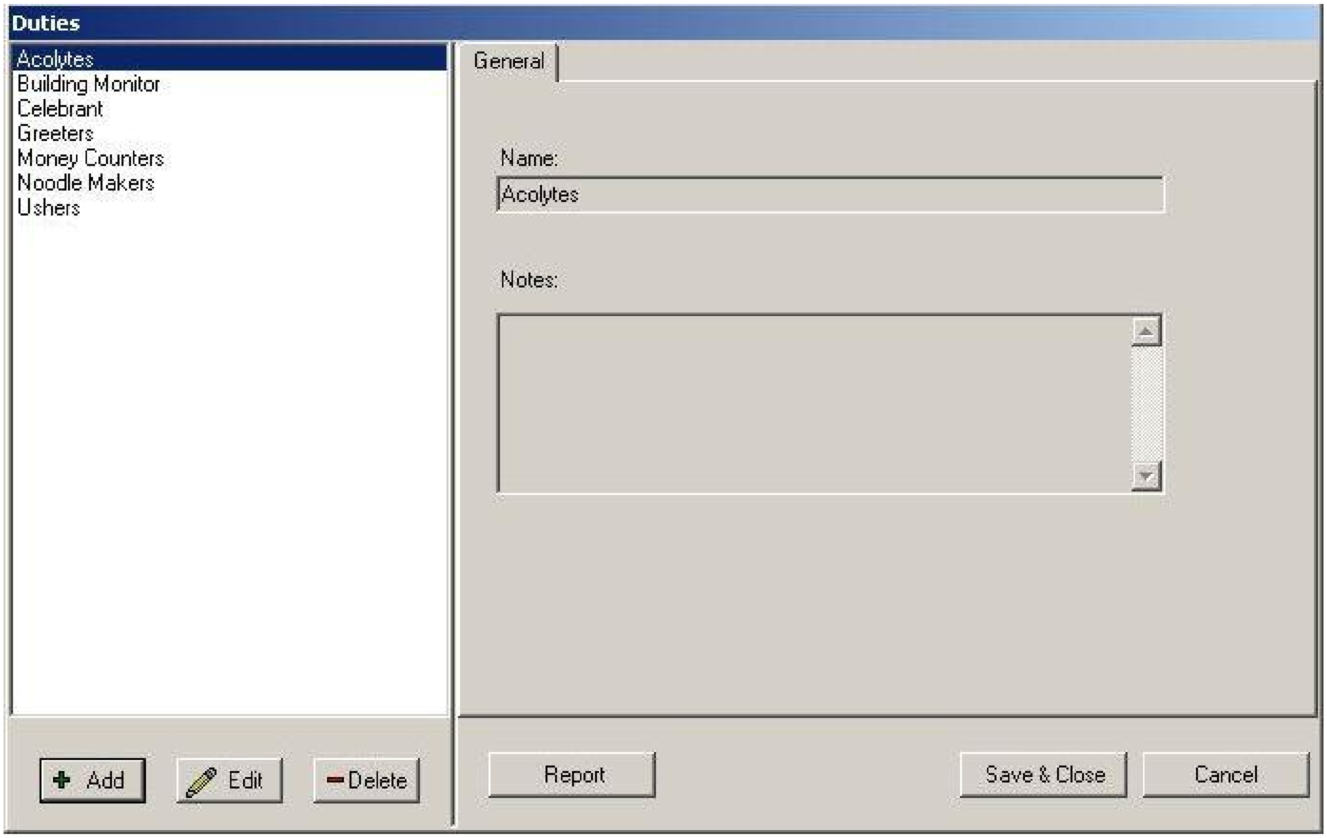
Duties

Identify the responsibilities to be tracked. The **Scheduler** Module gives you the option of setting up duties for an event and then assigning people to perform those duties. For example, for Sunday worship, you might need greeters, ushers, celebrant, etc.

To create, edit, or delete your list of duties:

- Click **Setup** from the **Scheduler Main Screen** *(pg 82)*.
- Then click **Duties**.

- The **Duties** screen will appear:



- To **Add** a new Duty:
  - Click **Add**.
  - Enter the desired duty name in the **Name** box.
  - You may add any comments about the duty in the **Notes** section.
  - Click **Add** again to enter the next duty.
- To **Edit** an existing entry:
  - Highlight the duty to be edited.
  - Click **Edit** to modify its name or notes.

- To **Delete** an existing entry:
  - Highlight the duty.
  - Click the **Delete** button.
  - The duty will be deleted from the list.
  - If you attempt to delete a duty that has been assigned to an event, the system will warn you that the duty has been assigned.
  - If you confirm that you want to delete the duty, the duty will also be removed from all events to which it is currently assigned.
- Click the **Report** button to print a listing of the duties. (This report can also be printed from the Reports menu in the **Button Bar** at the top of the screen then clicking *Duty Report*.)
- Click **Save & Close** to retain the duties entered or **Cancel** to discard them.

> ***Note:***
>
> *Duties can also be added when Creating an Event.*

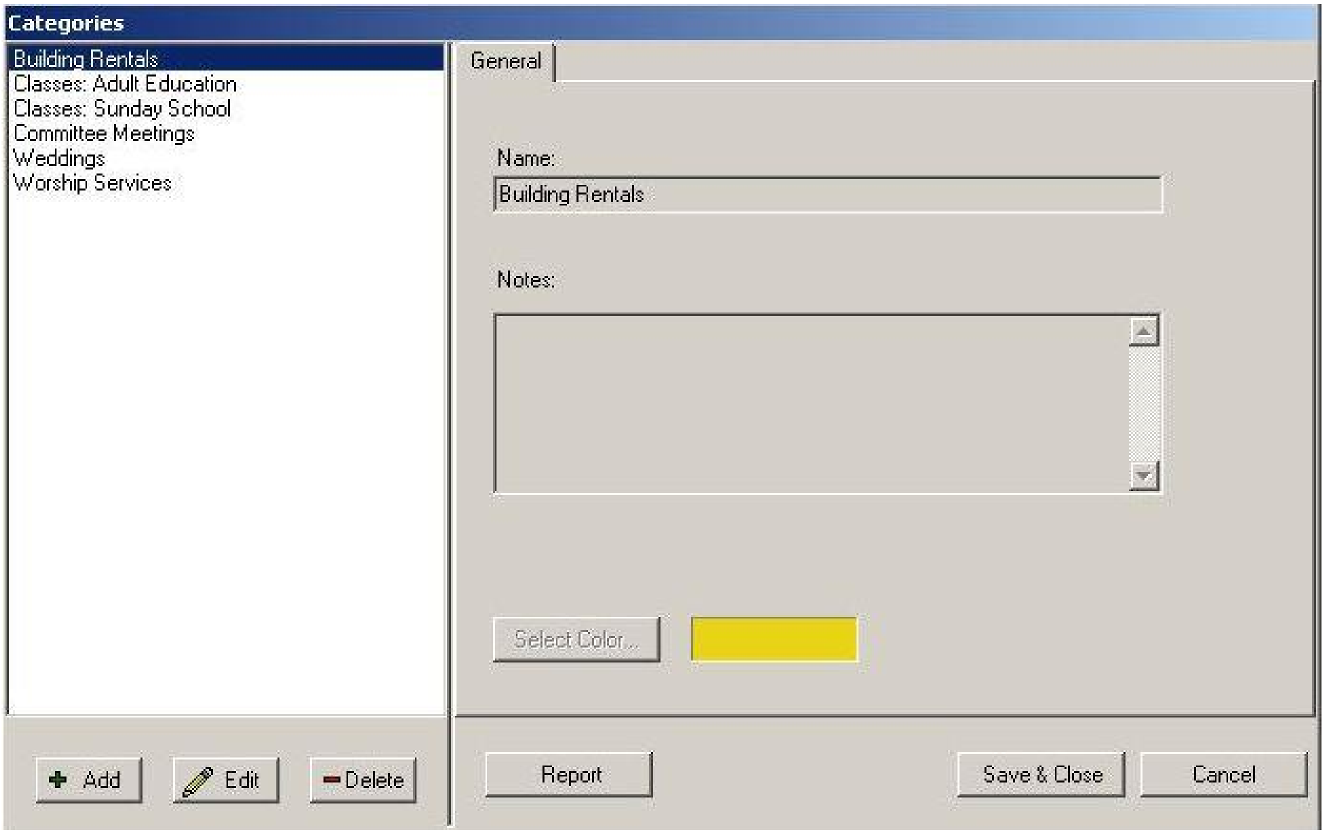
Categories

Identify an organizational structure. Categories are for organizing items in your **Scheduler** Module. To be able to display and report on a group of events, the events can be grouped into categories (Volunteering, Classes, Committee meetings, etc.). You define the categories that are needed.

To create, edit, or delete your list of categories:

- Click **Setup** from the **Scheduler Main Screen** *(pg 82)*.
- Then select **Categories**.

- The **Categories** screen will appear:



- To **Add** a new Category:
    - Click **Add**
    - Enter the desired category name in the **Name** box.
    - You may add any comments about the category in the **Notes** section.
    - A color will be assigned for this category. If you wish to change the color, click the **Select Color** button. A color palette will open for you to make a selection. This color will be used on the display screen.
    - Click **Add** again to enter the next Category.
- To **Edit** an existing entry:
    - Highlight the category and click **Edit**
    - Modify its Name, Notes or color as desired.

- To **Delete** an existing entry:
    - Highlight the category and click the **Delete** button.
    - The category will be deleted from the list.

> ***Note:***
>
> *Deleting a category does not delete the individual events scheduled with that Category. To delete events, see Deleting an Event.*

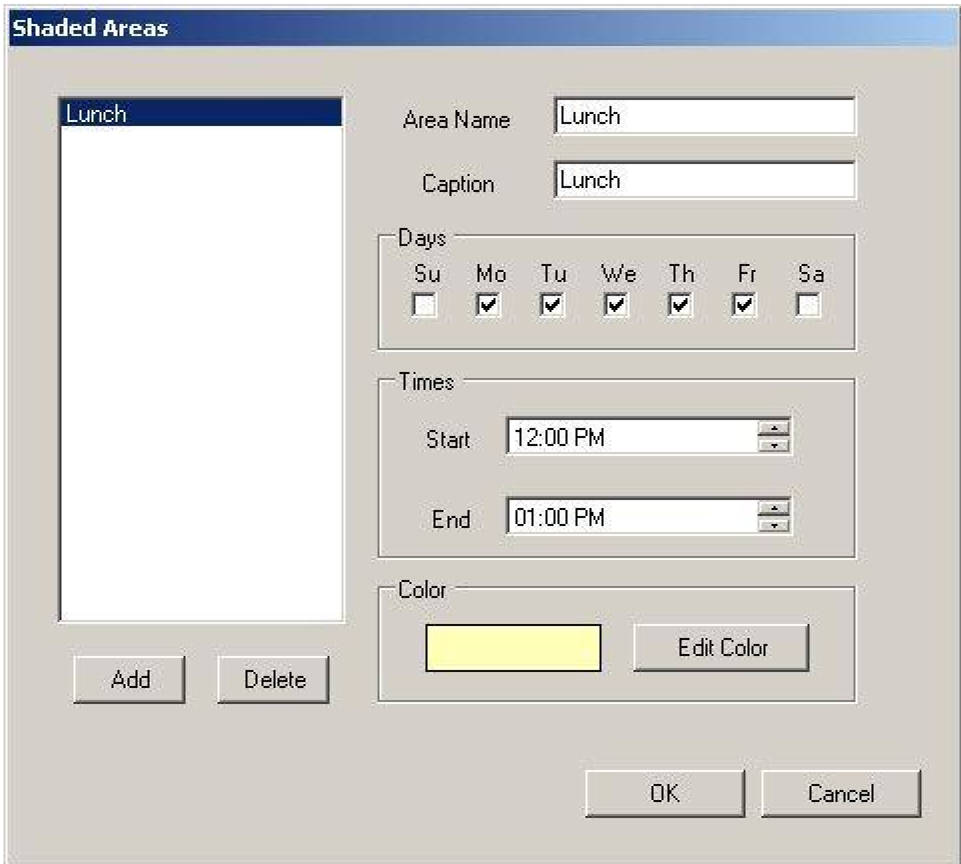
- Click the **Report** button to print a listing of the categories. This report can also be printed from the Reports menu in the **Button Bar** at the top of the screen then clicking Category Report.
- Click **Save & Close** to save your entries or **Cancel** to discard your changes.

Shaded Areas

Identify particular times without creating events. If you have certain times that you want to highlight on the grid without entering an event, you can use this feature. You can still schedule an event during the shaded period. The time will be shaded on the grid in the **View by Date** *(pg 84)* display (either Day or Week) until it is deleted.

To create, edit or delete shaded areas:

- Click **Setup** from the **Scheduler Main Screen** *(pg 82)*.
- Then select **Shaded Areas**.
- An **Options** screen will appear:



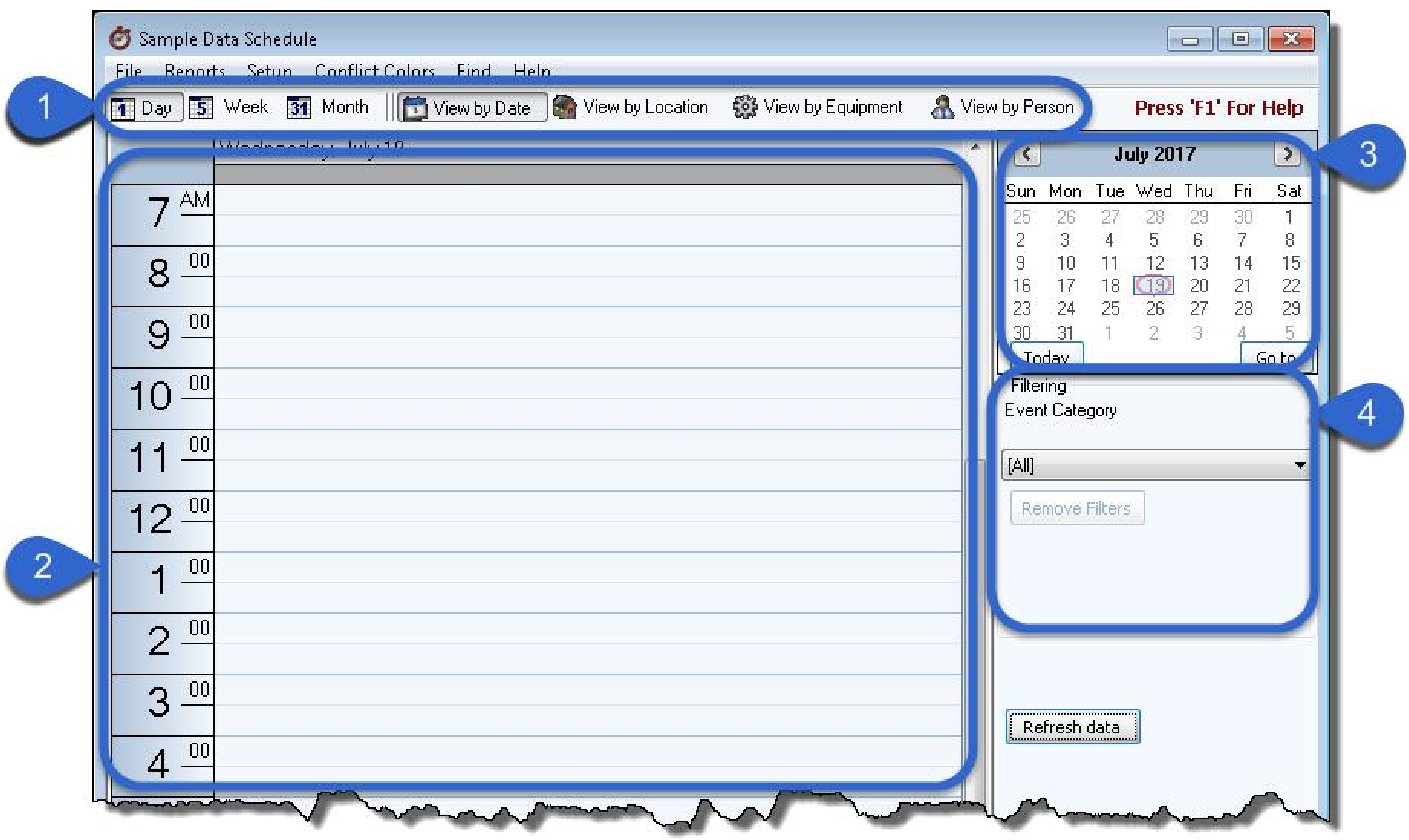
- Click **Add** to create a new shaded area:
  - **Area Name**
    Enter a name in the box.
  - **Caption**
    If you would like text to appear in the shaded area on the grid, enter text into the box.
  - Select the days of the week that you would like the grid shaded by clicking in the boxes under each day to put a checkmark.
  - Enter the **Start** and **End** Times.
  - Click the **Edit Color** button to choose a color to display on the grid for the time range entered.
- To **edit** a previously created shaded area:
  - Highlight the name to be changed on the left side of the screen.
  - The options on the right side of the screen will be available to be revised.

- To **delete** a shaded area:
    - Highlight the name to be deleted in the box on the left side of the screen.
    - Click **Delete**.
- When you have finished entering / editing shaded areas, click **OK** to save or **Cancel** to return to the Scheduler Main Screen *(pg 82)* without making any changes.

Once these have all been set up, you are ready to start Creating an Event.

Scheduler Main Screen

From The Initial Portal of Church Windows choose **Scheduler**. The **Scheduler** main screen will open as follows. There are 4 sections to the screen:



1. Display Options

The bar across the top contains two groups of settings to choose how you would like to view the grid portion of the screen:

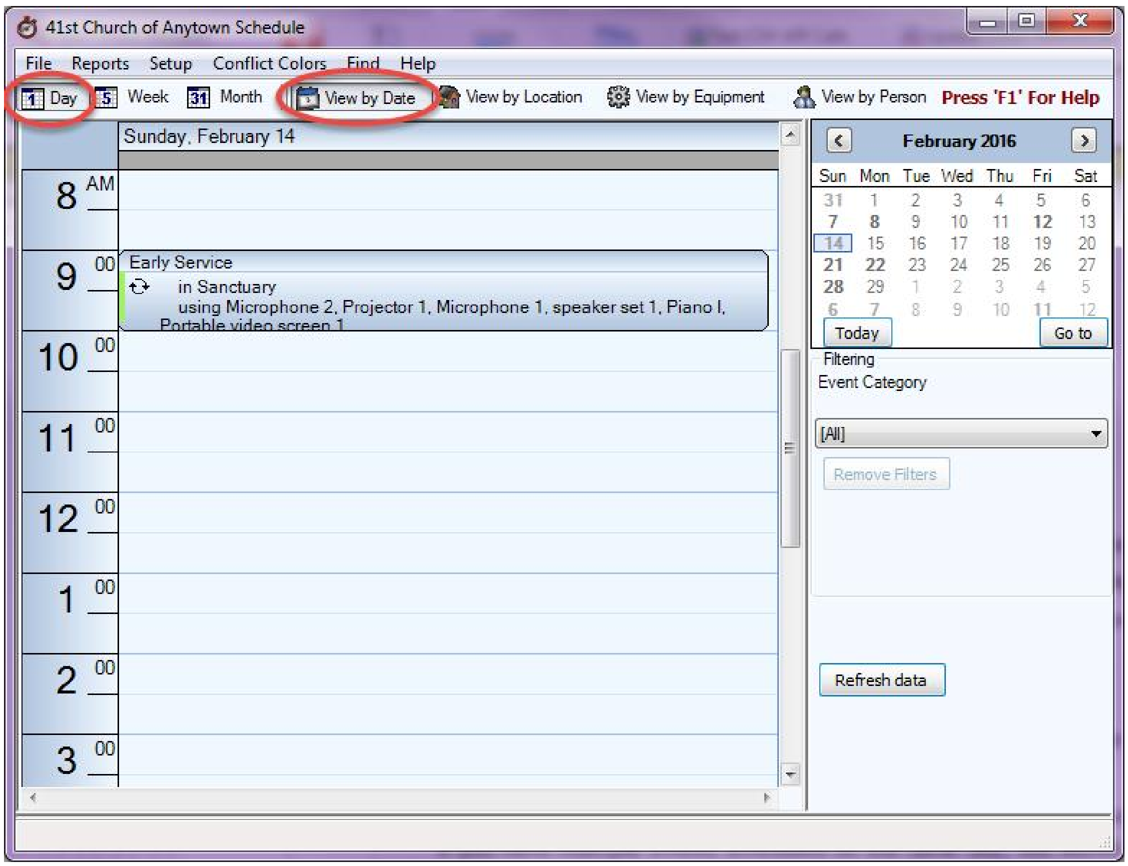
- How to view the Calendar Grid, either by:
  - **Day**
  - **Week**
  - **Month**

- How to view the Events, you can choose from:

View by Date

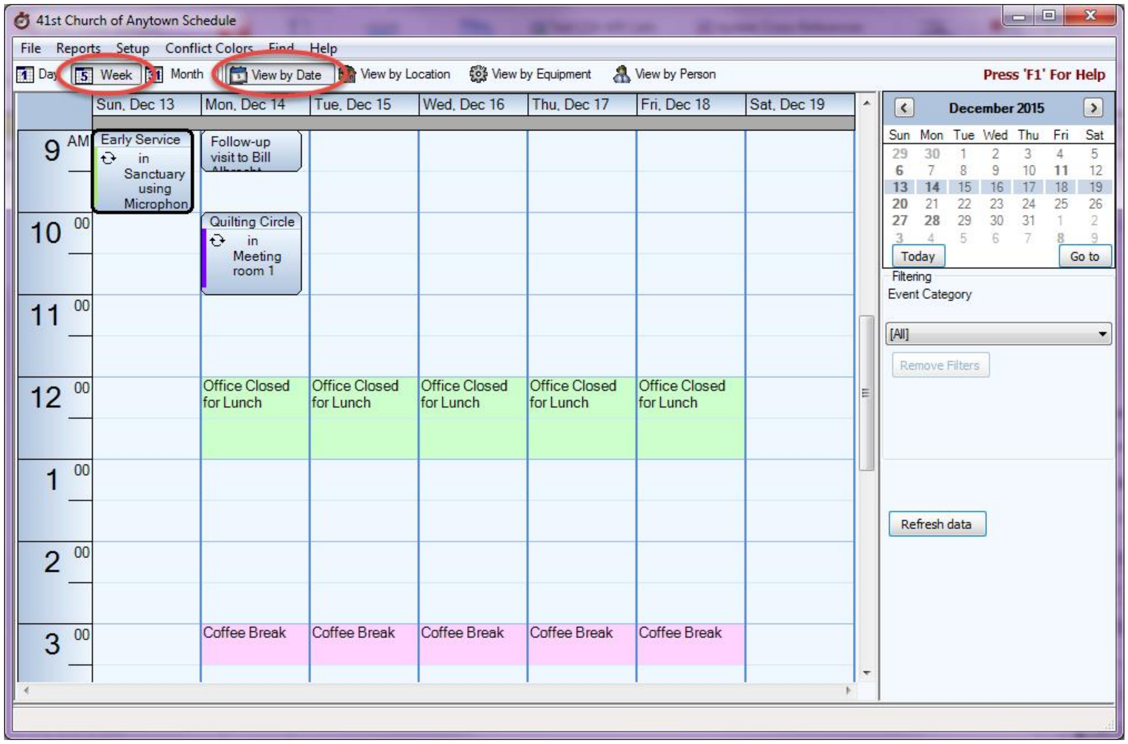
When you first open the **Scheduler** Module, the initial screen view will default to show the grid in **View by Date** mode by **Day**. However, you may go to the Scheduler Options and change this default to **Week** or **Month**.

- **Day**



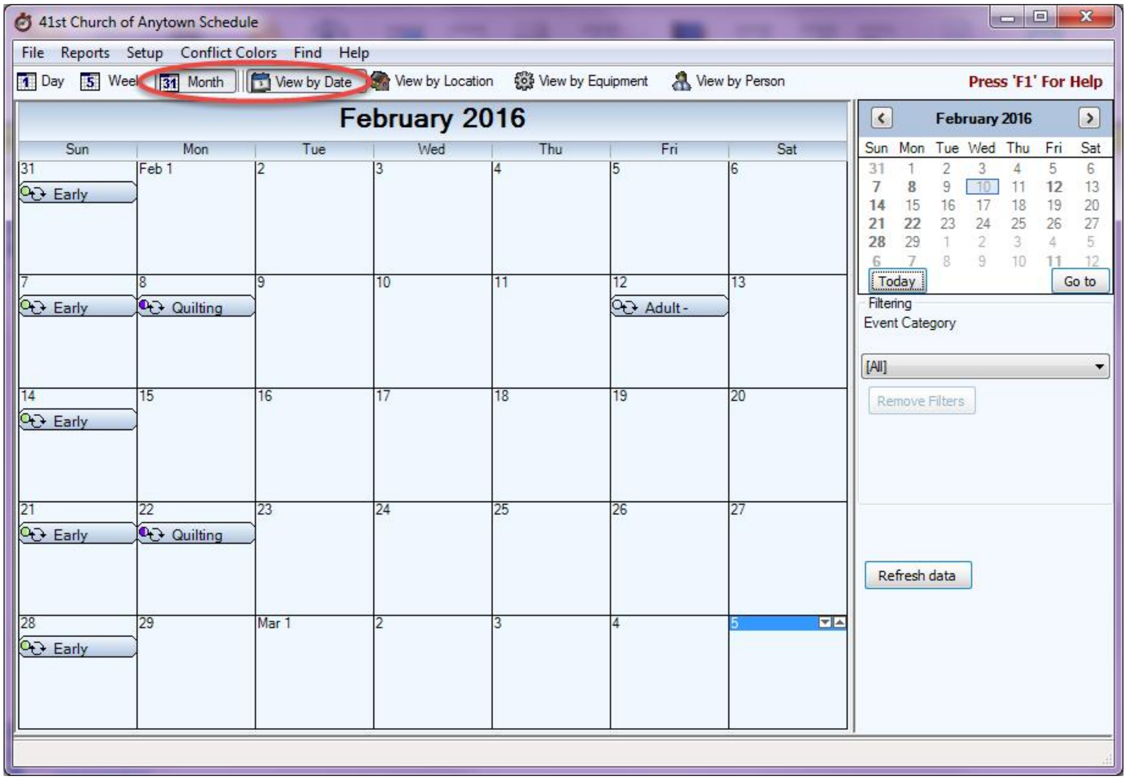
In **Day** view, the selected day will appear as a grid with events and times scheduled for each event for the date shown.

- **Week**



The Week view will show the events scheduled for the selected week and the times for each event.

- **Month**



Under the **Month** view, only the days and events (no times) will appear. If you have multiple events scheduled on the same day, the **Month** view may appear cut off some of the events.

Use the **Filtering** *(pg 91)* section on the right side of the screen to limit the **Event Grid** display to show only certain events:

- The dropdown allows you to select one of your event **Categories** *(pg 78)*. The default is **All**.
- Click the button **FilterLocations** *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* to bring up the list of all **Locations** *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* and place checkmarks by desired selections. You must select at least one item in order for the grid to display.
- The **Show scheduled only** checkbox will further limit the display by hiding unscheduled items.

View by Location

If you have created multiple Locations *(pg 69)*, you may choose to **View by Location**. There are two additional view options for this choice:

- Under the **Day** option, the grid will have columns for each location and the times that each location is being used:
- The **Week** or **Month** option will show the locations and the times that each location is being used for the selected week or month.

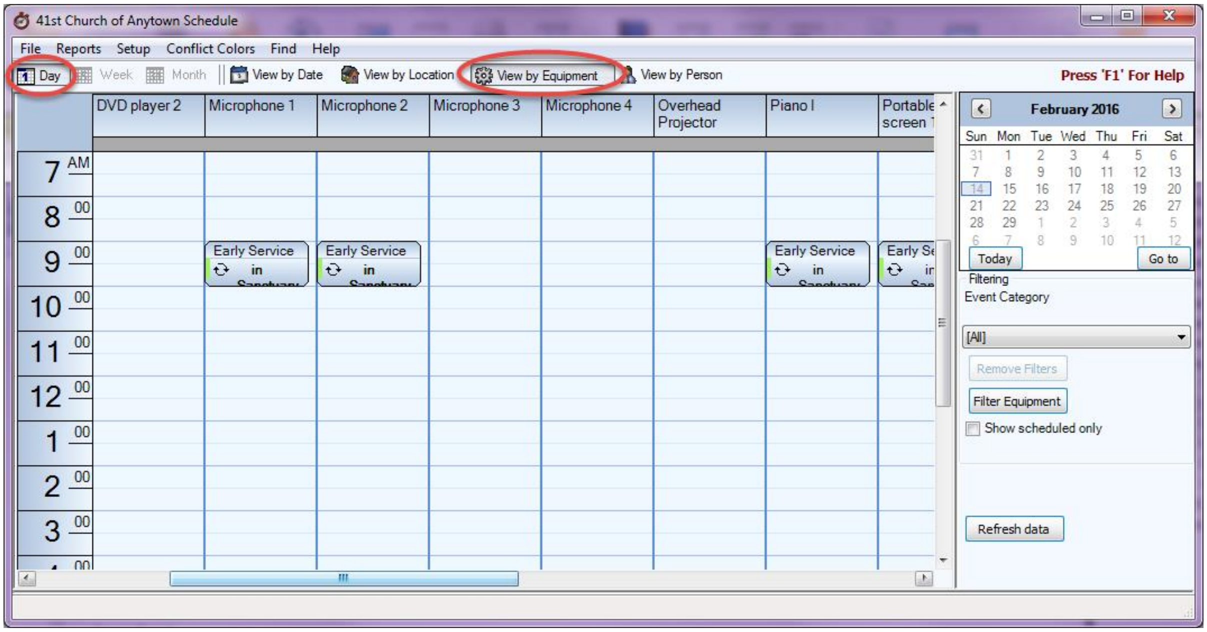
Use the Filtering *(pg 91)* section on the right side of the screen to limit the **Event Grid** display to show only certain events:

- The dropdown allows you to select one of your event Categories *(pg 78)*. The default is **All**.
- Click the button **Filter**Locations *(pg 91)*/Equipment *(pg 93)*/People *(pg 94)* to bring up the list of all Locations *(pg 91)*/Equipment *(pg 93)*/People *(pg 94)* and place checkmarks by desired selections. You must select at least one item in order for the grid to display.
- The **Show scheduled only** checkbox will further limit the display by hiding unscheduled items.

View by Equipment

If you have identified Equipment *(pg 73)* to be used, you may choose to **View by Equipment**.

The grid will show each piece of equipment as a column and the times that each piece of equipment is being used:



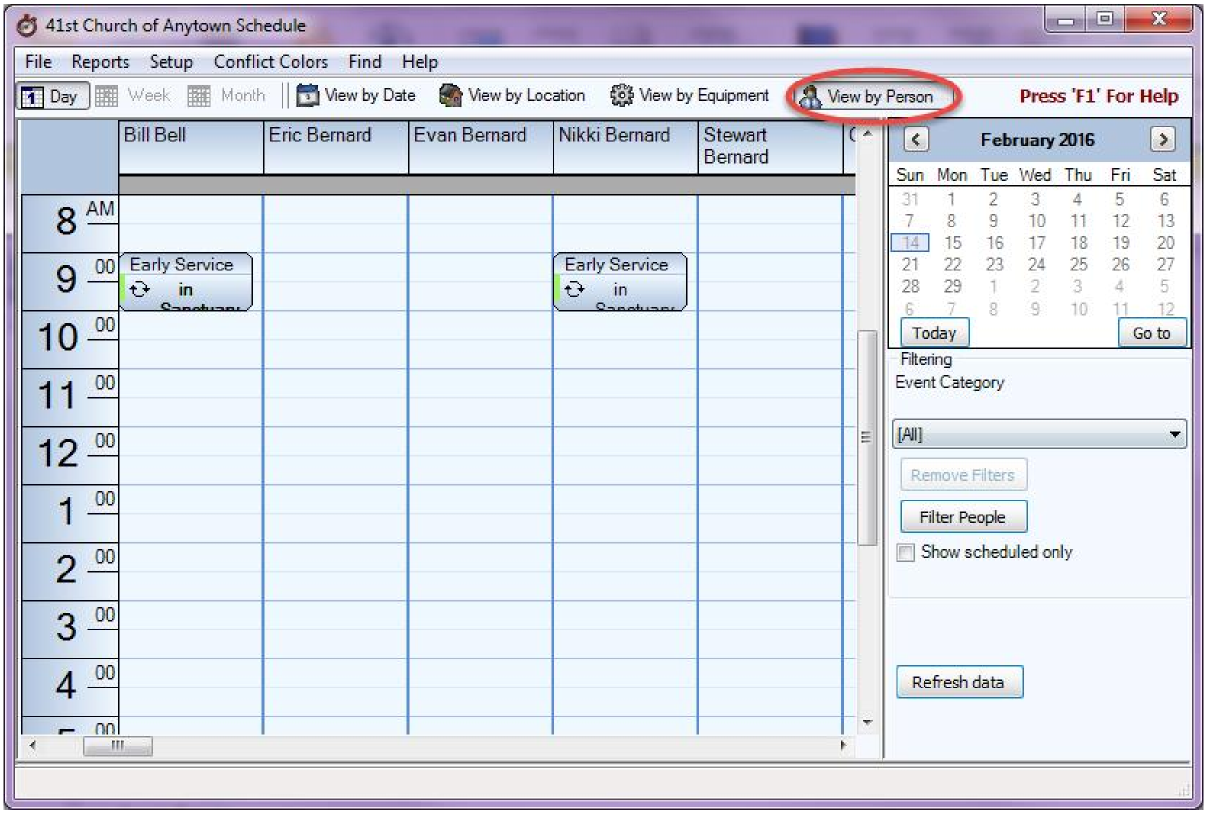
Use the **Filtering** *(pg 91)* section on the right side of the screen to limit the **Event Grid** display to show only certain events:

- The dropdown allows you to select one of your event **Categories** *(pg 78)*. The default is **All.**
- Click the button **Filter**Locations *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* to bring up the list of all **Locations** *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* and place checkmarks by desired selections. You must select at least one item in order for the grid to display.
- The **Show scheduled only** checkbox will further limit the display by hiding unscheduled items.

> ***Note:***
>
> *The Week and Month views are not available when you select to **View By Equipment**.*

View by Person

If you have identified **People** *(pg 66)* to be contacts or assigned duties, you may choose to **View by Person**. The grid will show a column for each person and the times that person is scheduled:



Use the **Filtering** *(pg 91)* section on the right side of the screen to limit the **Event Grid** display to show only certain events:

- The dropdown allows you to select one of your event **Categories** *(pg 78)*. The default is **All**.
- Click the button **Filter** **Locations** *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* to bring up the list of all **Locations** *(pg 91)*/**Equipment** *(pg 93)*/**People** *(pg 94)* and place checkmarks by desired selections. You must select at least one item in order for the grid to display.
- The **Show scheduled only** checkbox will further limit the display by hiding unscheduled items.

> ***Note:***
>
> *Week and Month views are not available when you select to **View By Person**.*

2. Event Grid

The left portion of the screen is a grid view of the scheduled events for each **Day**, **Week**, or **Month**. The **Display Options** *(pg 83)* above will allow you to alter exactly what you are able to see and how to interact with this grid. You can begin Creating an Event directly on the grid.

3. Calendar

In the upper right section of the screen is a small calendar. The default view is the current month but you can change this in Scheduler Options. Today's date will be circled in **red** on the calendar. If you are on a **Day** or **Week** view, the date(s) being displayed on the grid will be shaded in **blue** on the calendar:

To navigate through time using this calendar, you can:

- Use the arrows at the top to move between months.
- Click on a particular day to view it.
- Click the **Today** button to return to today's date.
- Click the **Go to** button and enter the specific date you want to view.

4. Filtering

The lower right section of the screen is the **Filtering** section, which allows you to limit the events that appear on the grid by **Categories** *(pg 78)*, **Locations** *(pg 91)*, **Equipment** *(pg 93)*, or **People** *(pg 94)*. The default filter is **All**.

- **Event Category**
  Each of the display views allow you to limit the display to specific event **Categories** ***(pg 78)*** if you have created categories and assigned them to events. Use this  dropdown button to select the Category you want to display.

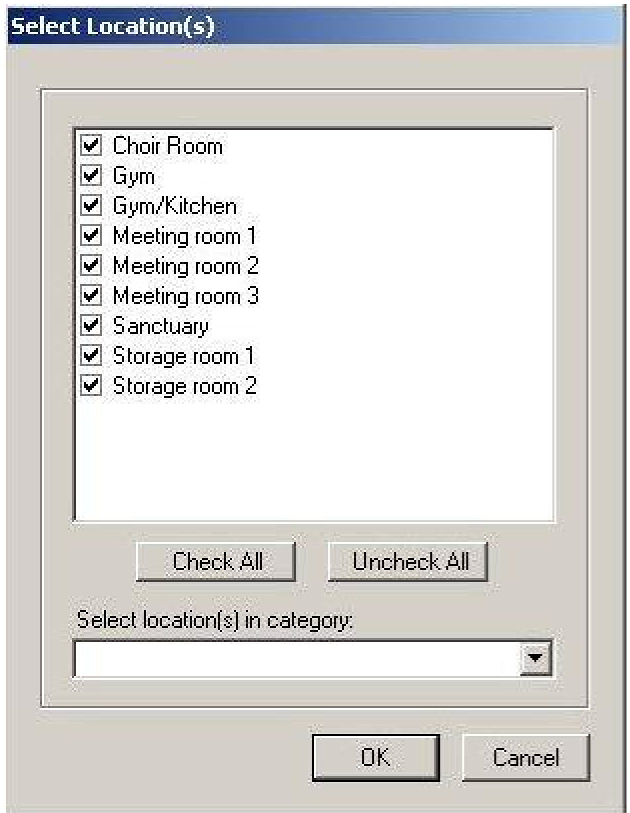
- **Show scheduled only**
  Click to put a checkmark in this box to display to only those locations/equipment/people that have been assigned for the events occurring during the time period displayed.

- **View by Location** *(pg 86)*, **View by Equipment** *(pg 87)*, or **View by Person** *(pg 88)* will each have the corresponding filtering options:

Locations

If you have selected the **View by Location** ***(pg 86)*** display for the grid, you can also restrict the display to one or more **Locations** *(pg 69)*.

- Click the **Filter Locations** button. The **Select Location(s)** screen will appear:



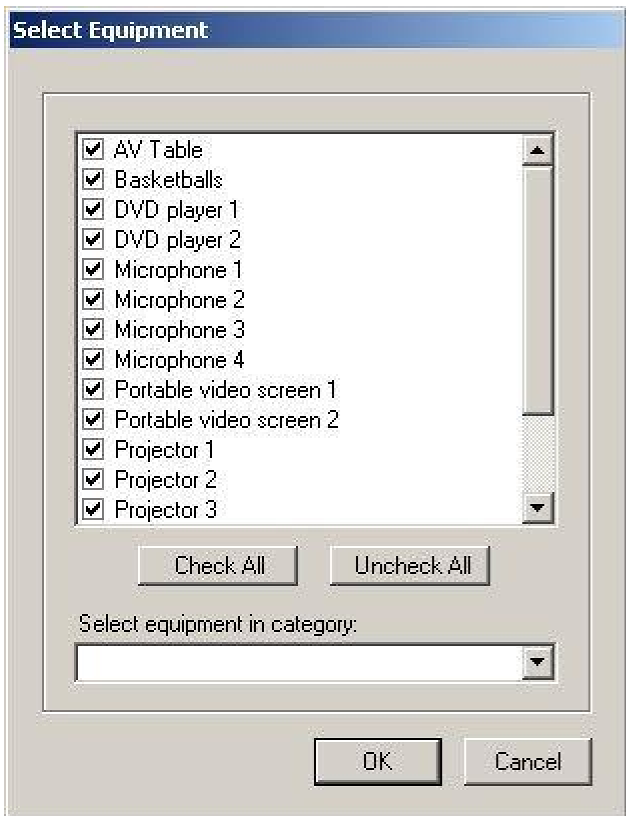
- The **Select Location(s)** screen lists all of the Locations *(pg 69)* that have been created.
- To include all of the locations in the view, click the **Check All** button.
- Click the **Uncheck All** button to clear the boxes beside the locations on the left side of the screen.
- To limit the view to one or more locations, click the box beside the desired locations to put a checkmark (remove the checkmark).
- The **Select Location(s)** screen also allows you to limit the locations by selecting a **Category**. Then, only those locations that have been assigned to that category will be displayed. Click the dropdown button in the **Select location(s) in category** box to choose a category.
- Click **OK** to close the **Select Location(s)** screen.
- The **View by Location** display will now only include the locations you have chosen.
- Click the **Remove All Filters** button to restore all events to the display.

- To change the locations listed on the **Select Locations** screen, go to **Setup**, and select **Locations** *(pg 69)*.

Equipment

If you have selected the **View by Equipment** *(pg 87)* display for the grid, you can also restrict the display to one or more pieces of **Equipment** *(pg 73)*.

- Click the **Filter Equipment** button. The **Select Equipment** screen will appear:



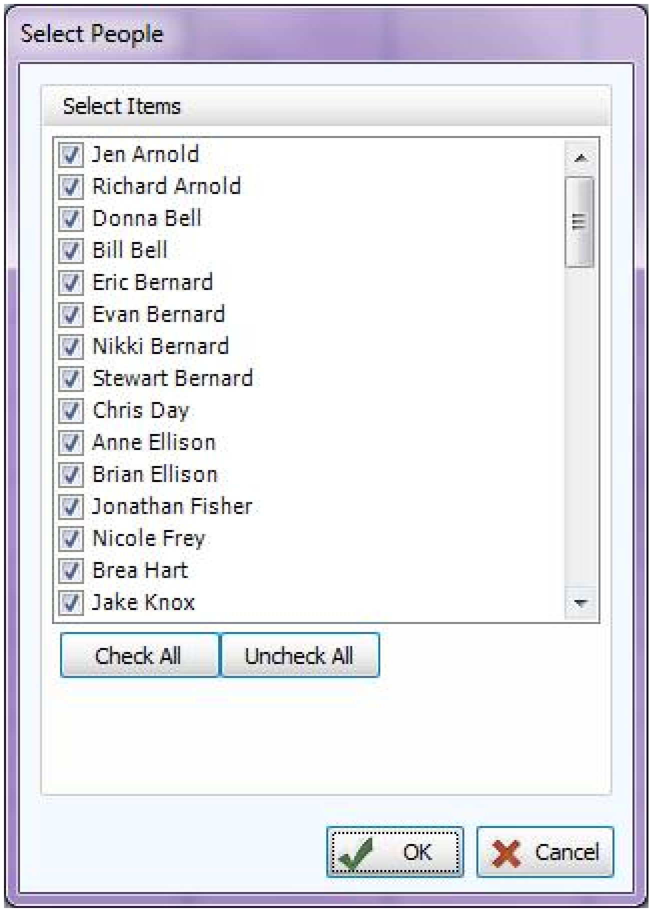
- The **Select Equipment** screen lists all of the **Equipment** *(pg 73)* that has been entered.
- To include all of the equipment in the display, click the **Check All** button.
- Click the **Uncheck All** button to clear all the boxes.
- To limit the view to one or more pieces of equipment, click the box(es) beside the desired equipment to put a checkmark (remove the checkmark).
- The **Select Equipment** screen also allows you to limit the display by selecting a **Category**.

- Then, only those pieces of equipment that have been assigned to that category will be displayed. Click the dropdown button in the **Select equipment in category** box to choose a category.
- Click **OK** to close the **Select Equipment** screen.
- The **View by Equipment** display will only include the pieces of equipment that you have chosen.
- Click the **Remove All Filters** button to restore all events to the display.
- To change the equipment listed on the **Select Equipment** screen, go to **Setup**, and select **Equipment** *(pg 73)*.

People

If you have selected the **View by Person** *(pg 88)* display for the grid, you can also restrict the display to one or more individuals.

- Click the **Filter People** button. The **Select People** screen will appear:



- The **Select People** screen lists all of the People *(pg 66)* that are active in the **Scheduler**Module.
- To include all people in the display, click the **Check All** button.
- Click **Uncheck All** to clear the buttons beside the individuals listed on the left side of the screen.
- Click to put a checkmark in the boxes beside the names of the individuals to be displayed.

- Click **OK** to close the **Select People** screen.
- The **View by Person** display will only include the people you have chosen.
- Click the **Remove All Filters** button to restore all events to the display.

- To change the people listed on the **Select People** screen, go to **Setup**, and select **People** *(pg 66)*.

Chapter 4 - Donations

Donations

The **Donations** Module keeps track of money, gifts in kind, and stock that is given towards pledges, offerings, and other designated purposes at your Church.

Donations provides you with various screens to perform the following tasks:

- Add Givers and Assign Giver Numbers.
- Manage Accounts towards which the Givers make their donations.
- Enter Pledges and Add a New Campaign.
- **Enter Donations** *(pg 105)*.
- Run Reports, Labels, and Statements for the Givers and Giving Accounts.

If you use the **Accounting** *(pg 129)* Module of Church Windows, the **Donations** Module will also make available to you a feature to Transfer Donations to Accounting where they can be incorporated into the Chart of Accounts for your Church. Though Donations Givers can be added from within the **Donations** Module, it also pulls names from The People File in the **Membership** *(pg 29)* Module and places them in a list of Givers for you to define who receives Donation Statements and if they will be Giving as a Family or Giving Separately.

Initial Setup for Donations

Before you begin to **Enter Donations** *(pg 105)*, set up pledges and campaigns, and run reports, go through the following checklist of features. By making sure the following items have been set up, you will be equipped with the necessary components to successfully run the **Donations** Module.

1. **Settings**:

   When you first activate the **Licensing** *(pg 187)* key for the **Donations** Module you will be able to open the **Donations** Module by clicking Donations from **Opening Church Windows** *(pg 3)* of Church Windows. The software will bring you to a screen where you must then define the fundamental Donations Settings applicable to how you will use the **Donations** Module. Enter your settings and click the OK button to proceed. These settings can also be adjusted at a later time according to your needs.

2. **Givers**:

   Each individual kept track of in the software is listed in the **Donations** Module as a Giver, regardless of how much money they give. Click the **Manage Givers** *(pg 118)* button found both on the **Donations** Portal, and by clicking **Givers** in the **Button Bar** at the top of the screen The screen will show you a list of Givers that have already been added to The People File in the **Membership** Module. If you need to Add Givers, click the **Add** button either on the **Individual Givers** tab to add an individual, or on the **Families & Groups** tab to Add a Group of Givers.

3. **Giver Numbers** *(optional)*:

   If your Church assigns Envelope of Giver numbers to its contributing parishioners, you can use the Manage Giver Numbers and/or Auto Assign Giver Numbers features to build a list where you assign a number to each selected Giver. These features are found under the **Givers** menu.

4. **Giving Accounts**:

   Set up the accounts that you will be using to show the purposes towards which your parishioners can make their donations. Click the **Add Account** button under the **Accounts & Pledges** menu to Add an Account. You can also use the Manage Accounts feature found under the **Accounts & Pledges** to review the list of Giving accounts already added and add as many as you need.

5. **Link to Accounting**:

   If you will be transferring donations to the **Accounting** *(pg 129)* Module after posting them, click the **Default Account Links** button under the **Special Functions** menu. Use the Default Account Links tab to connect the Giving Accounts in **Donations** to the desired accounts in **Accounting**.

6. **Pledges & Campaigns**:
   Commitments that your Givers make to give money towards your Church are kept track of in the software as **Pledges**. When your Church sets out to reach a fundraising goal and invites Givers to commit to give money towards it, you can Add a New Campaign. You can Enter Pledges as part of a Campaign or separately for each Giver. Pledges and donations can also be set to automatically be divided into accounts when you **Enter Donations** *(pg 105)*, this is called a Giving Distribution.

Pledges

When you have been given the information that someone is making a pledge, you will need to know:

- The person's name
- The account name towards which they are making a pledge
- The pledge amount
- The frequency
- The duration

Then in the Enter Pledges screen, enter the name of the **Giver** to reveal the **Giving Account**, **Frequency**, **Amount per Frequency**, **Start Date**, **End Date** for each pledge. Based on the **Start Date** and **End Date** you enter, the software will multiply the **Amount per the Frequency** to give you the **Total Pledged** and the number of payments needed to match the **Total Given** with the **Total Pledged**.

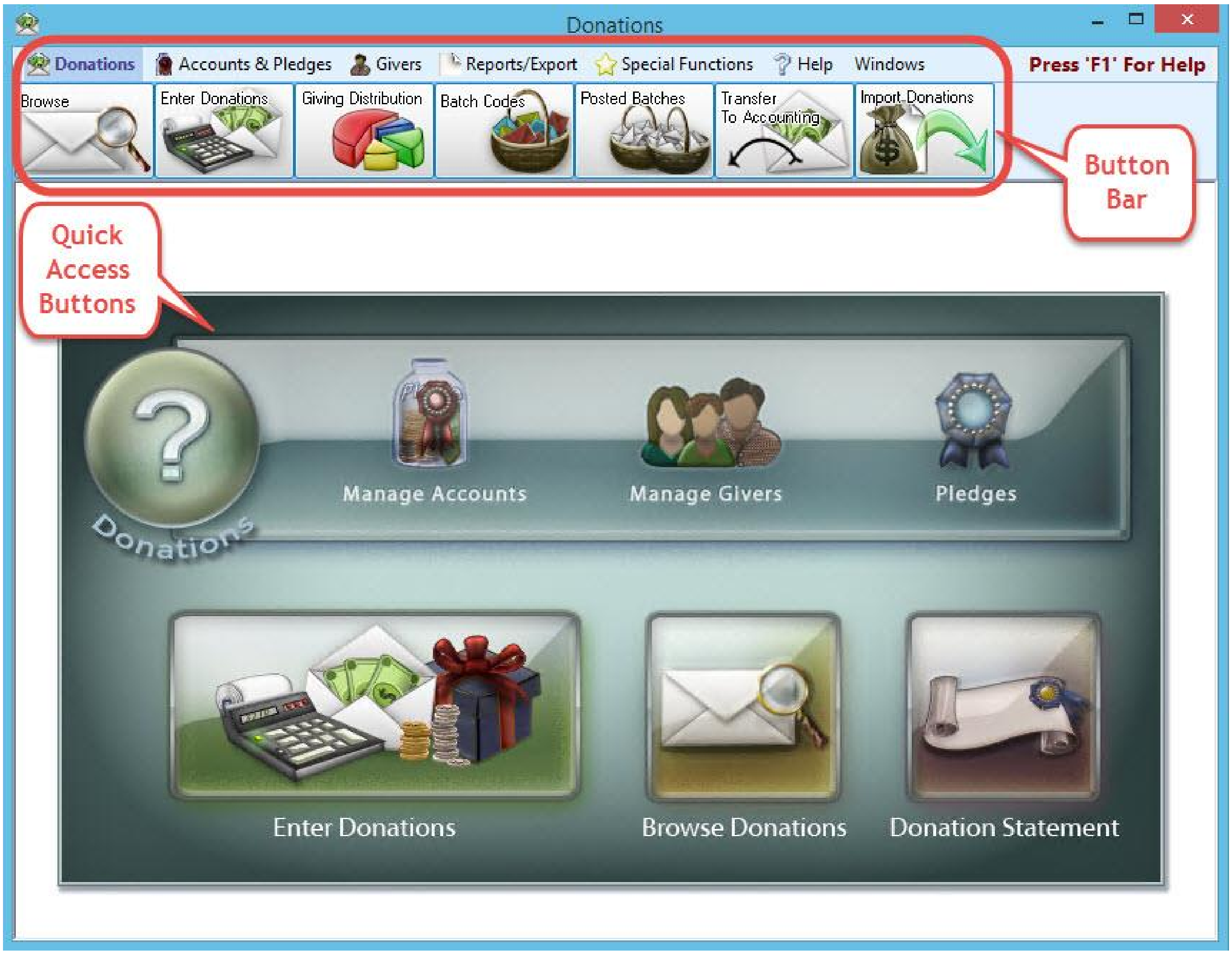
Campaigns

When your Church sets a goal to raise a certain amount of money, it then invites people to make a commitment to donate money towards the goal. The software features a screen to Add a New Campaign where you create the campaign and add Givers to it. The campaign can be set up for Givers to make annual or multi-year pledges by manually setting the date to reflect the decided pledge period of time.

About Donations

The **Donations** Module of Church Windows provides an area of the software where you can keep track of money that is given to the Church. Money given outright is recorded into the software using the **Enter Donations** *(pg 105)* screen, while money that is declared in a commitment to be given is recorded in the software using Pledges.

When you click on the **Donations** button from Opening Church Windows *(pg 3)*, it will open a whole new window we will call the **Donations** Portal. This will have seven different **Quick Access Buttons** in the center of the screen as well as a **Button Bar** across the top of the screen to choose from different functions depending on what you need to do:



Quick Access Buttons

? Donations — This is the **Help** button which will open this help interface (you can also press the **F1** key on your keyboard from anywhere in Church Windows to bring you to the relevant section of these help files).

Manage Accounts, **Manage Givers** *(pg 118)*, and Pledges

Enter Donations *(pg 105)*, Browse Donations, and Donation Statements

Button Bar

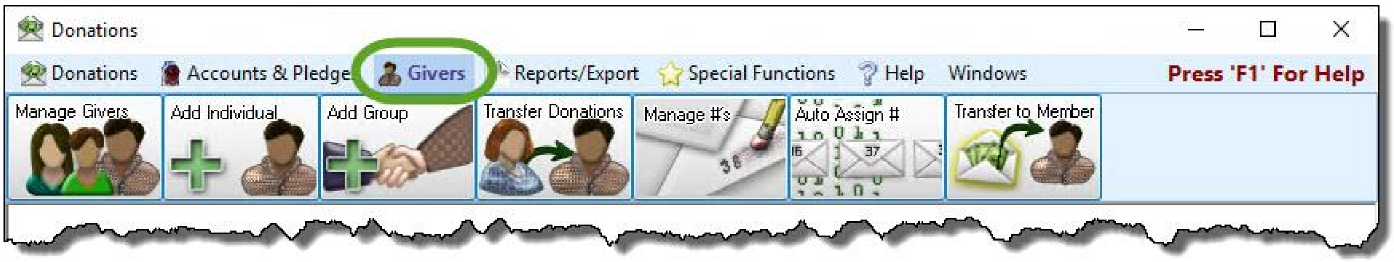
Donations

These allow you to Browse Donations, **Enter Donations** *(pg 105)*, specify how the Giving Distribution divides donations, customize Batch Codes, view and reverse or Correct Posted Batches, Transfer Donations to Accounting (if the Church has also purchased the **Accounting** Module), and Import Donations from a third party company.

Accounts & Pledges

These give various options to Manage Accounts, Add an Account, Order Giving Accounts, and it allows you to view and enter Pledges, and work with Subtotals.

Givers

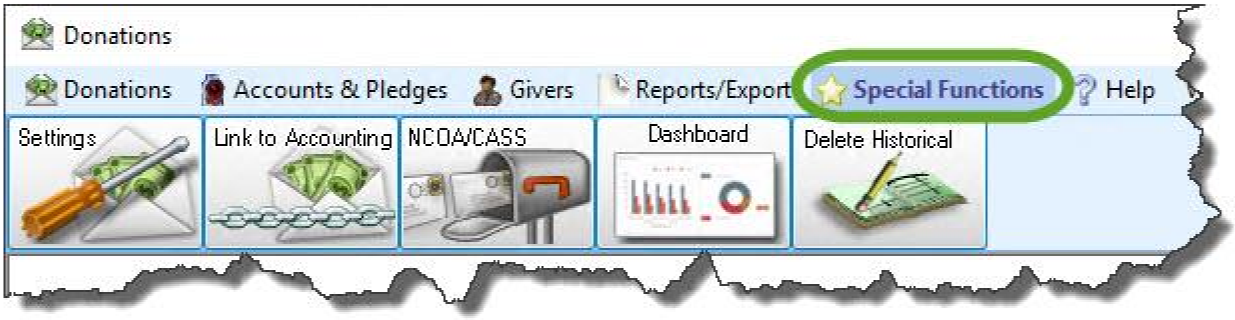


These options let you **Manage Givers** *(pg 118)*, Add Givers, Add a Group of Givers, Transfer Donations, as well as Manage Giver Numbers and Auto Assign Giver Numbers.

Reports / Export

These options give you the ability to run Reports, Labels, and Statements, Compare & Analyze the giving and pledging, and view / send / print Donation Statements.

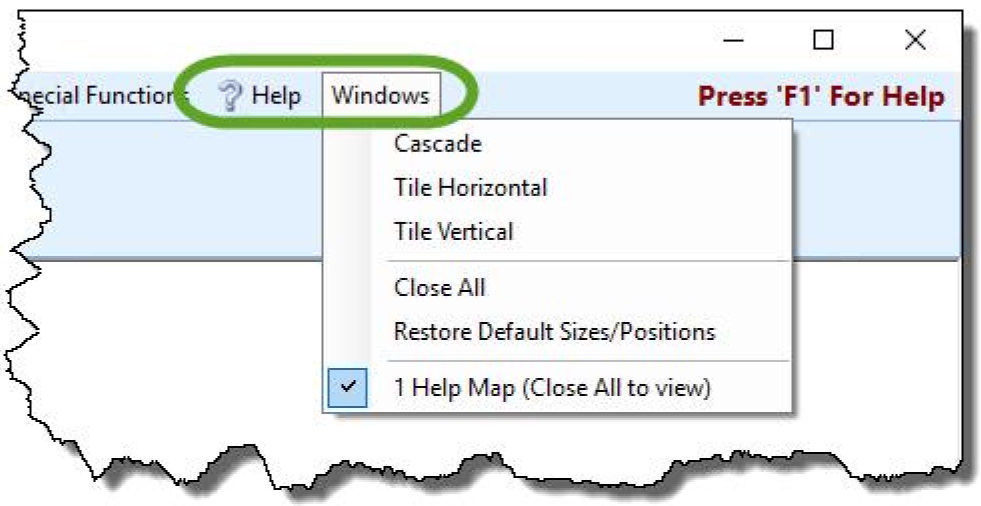
Special Functions



Here you can modify the Donations Settings to customize each **Users** *(pg 189)*' preferences, Link Donations to Accounting for transfer, setup and utilize the **CASS Certification and NCOA Processing** *(pg 210)*, view charts and graphs in the Donations Dashboard, and remove out-dated information from the database using Delete Historical.

Help and Windows

The final two options in the Button Bar across the top of the screen are **Help** and **Windows**.

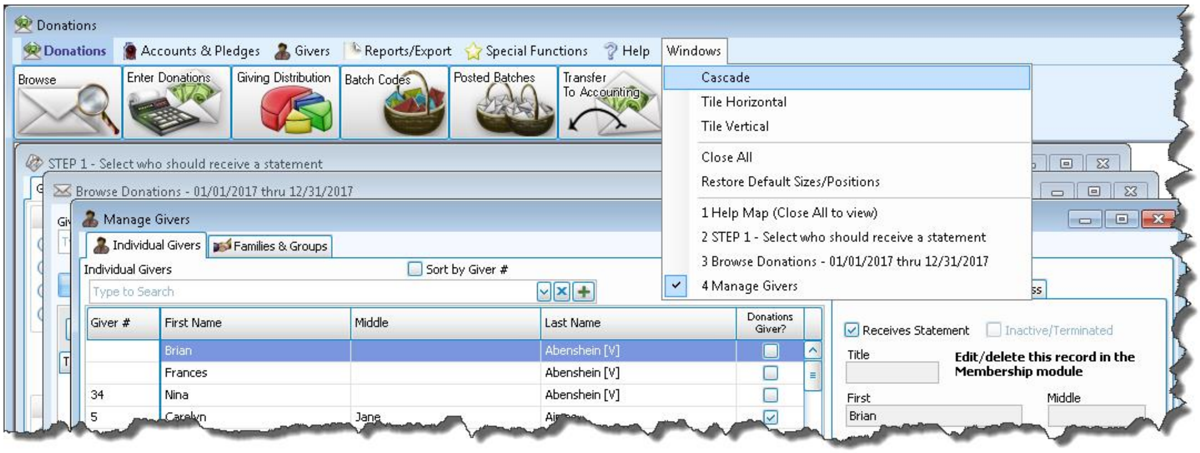


? Help is a quick link to bring you to these help files. You can also always press **F1** on your keyboard to go to the specific area of these help files relevant to the screen where you pressed the **F1** key.

The **Windows** dropdown menu is divided into three sections which allow you to adjust how your windows or screens appear in the current Module. These options are quite handy when multitasking with various functions in the software.

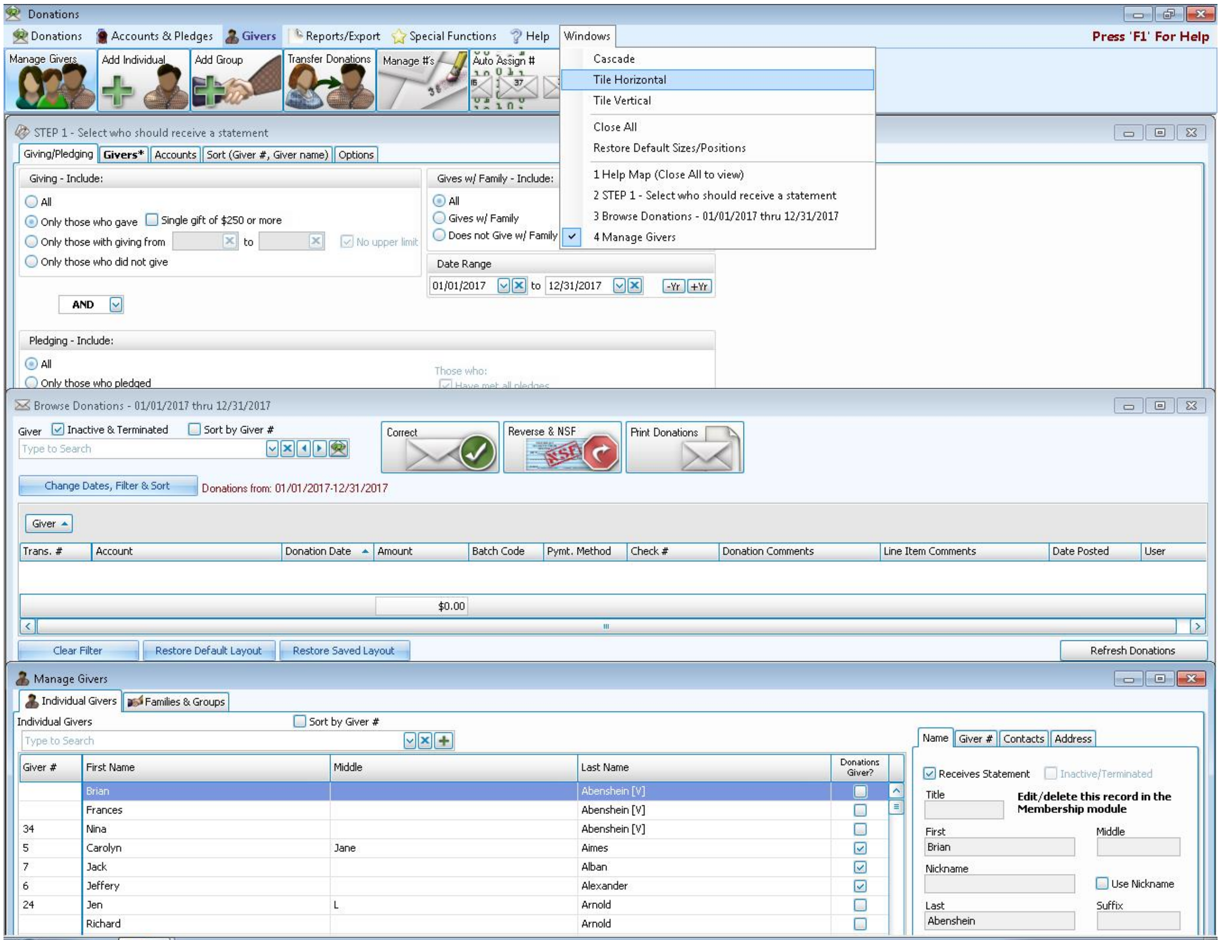
1. The first section provides three choices for arranging the current set of open windows:

   - **Cascade**
     Displays the windows in a staggered formation, starting in the top left corner and continuing down and to the right in small increments:



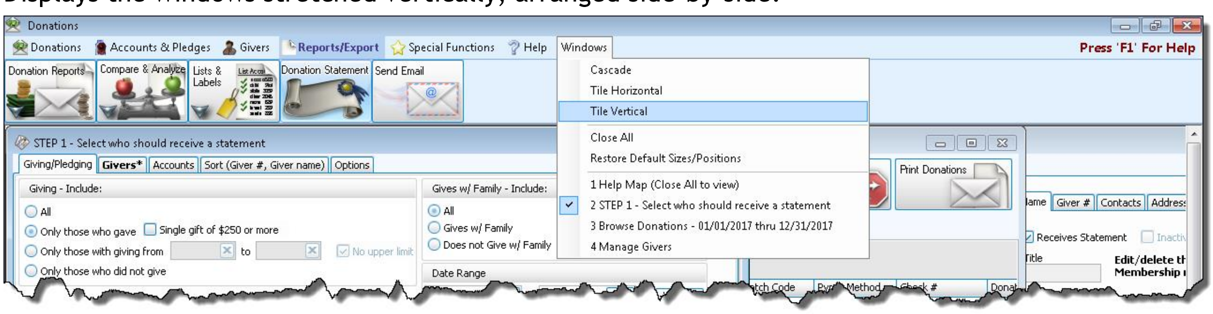
- **Tile Horizontal**

  Displays the windows stretched horizontally, stacked top to bottom:



- **Tile Vertical**

  Displays the windows stretched vertically, arranged side-by-side:



2. The middle section in this menu includes two functions:

   - **Close All** — This will close all open windows in the current Module (useful for functions that require you to close all other windows).

- **Restore Default Sizes/Positions** — This choice will **Restore screens to their original size and position** *(pg 17)*

3. The bottom section contains a list of each of the windows that are currently open. Clicking on one of them will bring that window to view in front of the other open windows.

Enter Donations

Use the **Enter Donations** screen to enter the money that Givers donate to your Church and its purposes / campaigns into the software. Through the **Enter Donations** screen, gather the donations into a batch and post the batch. The software will then update the donation records for the Givers with the information you entered.

To access the Enter Donations screen:

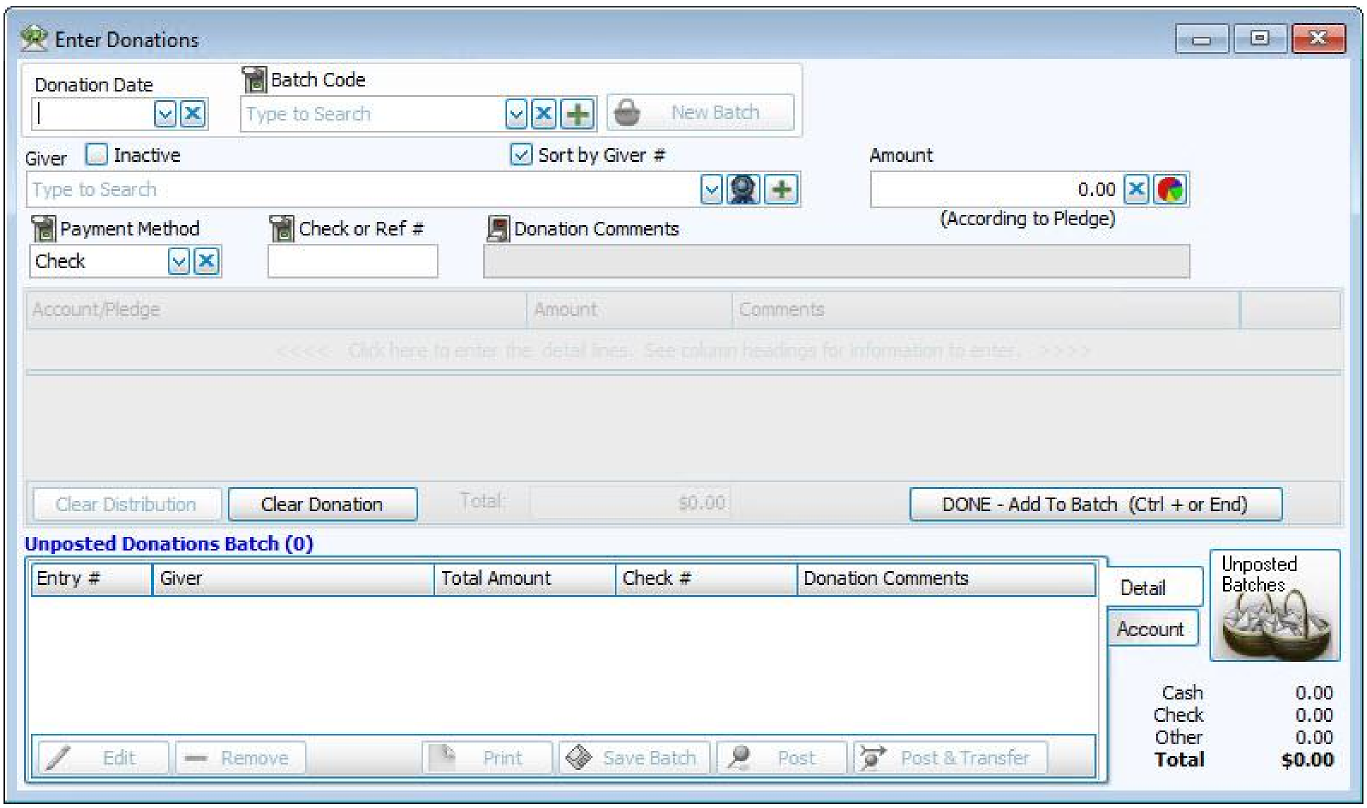
1. From The Initial Portal of Church Windows choose Donations then either:
   - Click the **Enter Donations** button in the **Quick Access Buttons** in the middle of the screen:

OR

   - Click **Donations** in the **Button Bar** at the top of the screen:

- Then, from the menu options that appear underneath, click **Enter Donations**:

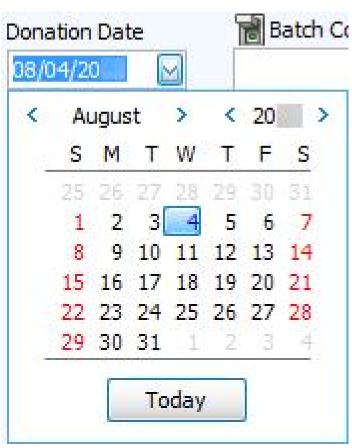
2. This will open the **Enter Donations** screen:



Note:

*The **Enter Donations** screen provides you with the option of Locking Fields to make a selection from a field and lock it in place or skip a field you do not use. You might find this most useful if you use the **ENTER** and **TAB** keys to move from one field to the next. To enable this feature, you must make a desired selection from the field and click the **ON** light switch to lock it in place, indicated by the **OFF** light switch. When you lock the field in place, pressing the **ENTER** or **TAB** key will advance to the field after the field that has been locked.*

3. **Donation Date**
   Click the dropdown button and select the date on which the donations were collected:

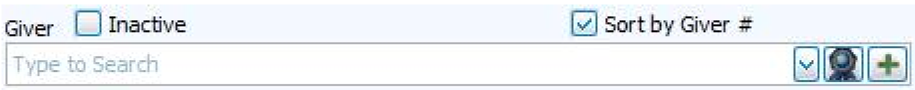


4. Batch Codes

   If you have a **Batch Code** that you would like to apply to the donation(s), click the dropdown box and select it from the list:

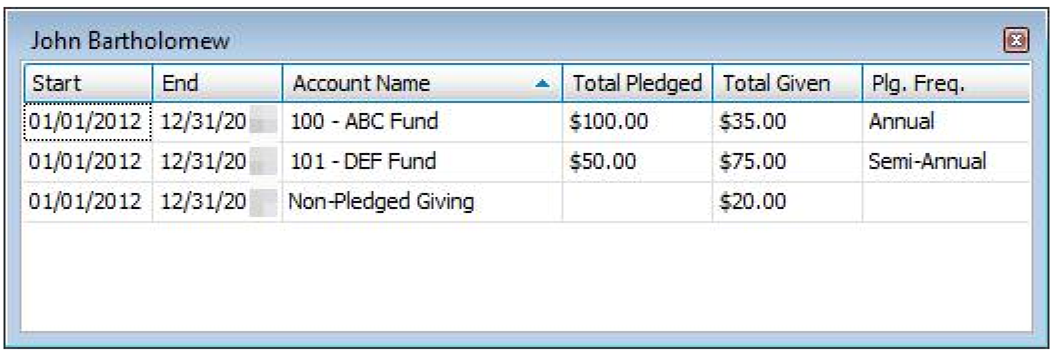
> ***Notes:***
>
> *If you do not see a **Batch Code** in the list, click the **Add** button to add a new **Batch Code**. Adding new Batch Codes will then allow you to apply the **Batch Code** to the current batch. Also, this new **Batch Code** would be available for you to apply to any future batches that would need it. Additionally, this is one of the Locking Fields, meaning that you can turn it off if you do not want to fill it out.*

5. **Giver**
Click the dropdown button of the box or starting typing and choose the name of the person giving money:



Pledge / Giving button

If you wish to see a short log of what the selected Giver has already donated and pledged, click the pledge / giving button and a window will appear. Close this window when finished viewing.


John Bartholomew

Start	End	Account Name	Total Pledged	Total Given	Plg. Freq.
01/01/2012	12/31/20	100 - ABC Fund	$100.00	$35.00	Annual
01/01/2012	12/31/20	101 - DEF Fund	$50.00	$75.00	Semi-Annual
01/01/2012	12/31/20	Non-Pledged Giving		$20.00	

- **Start**: The Start date of the pledge listed under Account Name.
- **End**: The End date of the pledged listed under Account Name.
- **Account Name**: The name of the Pledge.
- **Total Pledged**: The total amount of money pledged for the duration of the pledge.
- **Total Given**: The total amount of money given towards the pledge, during this time frame.
- **Plg. Freq.**: The frequency at which a portion of the Total Pledged money.

> **Note on Plg. Freq.**: *In the image above, the **Total Pledged** for the DEF Fund is listed at $50.00. The **Plg. Freq**. shows Semi-Annual. This means that the **Amount Per Frequency** for this person to the DEF Fund is $25.00 every 6 months (Semi-Annual), as recorded in the Enter Pledges procedure.*

Note:

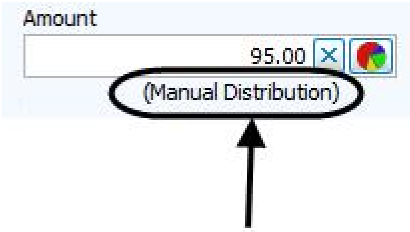
*If you do not find the name of the Giver in the box, it is possible that the Giver is inactive or was never added as a Giver. Be sure to verify that the Giver is not listed as **Inactive** first, so that you do not add a duplicate entry for a Giver that might already exist. First, place a checkmark in the **Show Inactive** box and search for the name once again. Then, after you have determined that a record for the Giver must be added, click the **Add** button to Add Givers.*

6. **Amount**

   Enter the entire amount donated by the Giver.

7. Giving Distribution

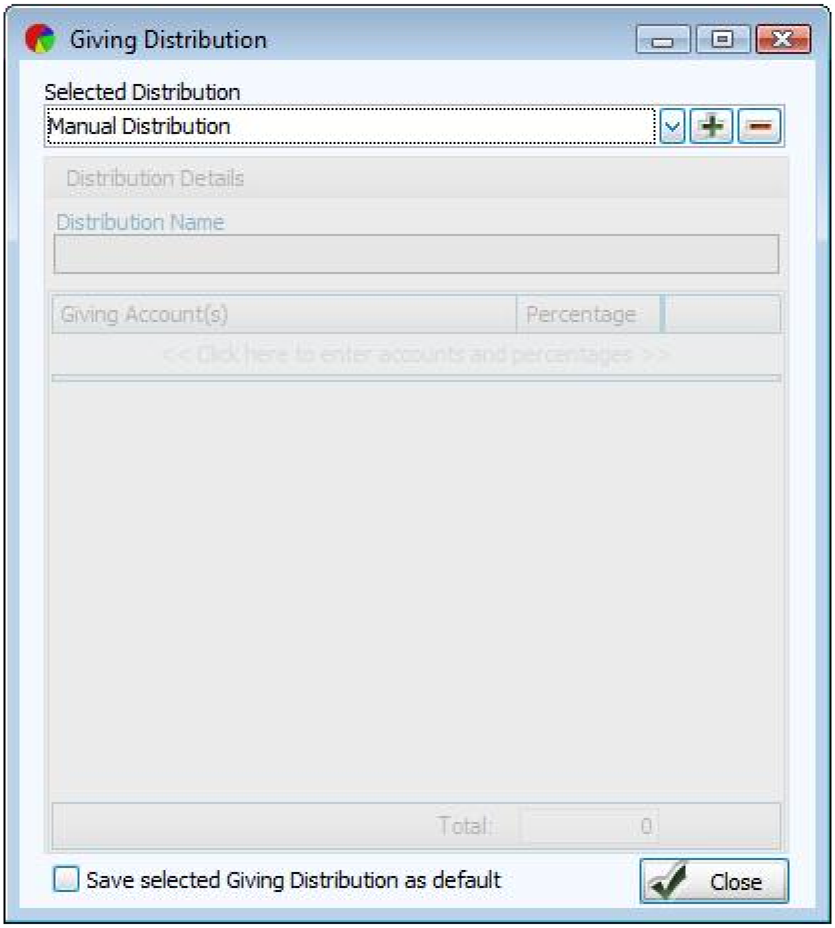
Take a look at the item in parenthesis below the amount you entered.



The item within the parenthesis, called Giving Distribution, represents how the money entered in the Amount box will be distributed among the funds towards which the Giver is donating. The item in parenthesis might be a name that someone at your Church has entered into **Donations**. Otherwise, the item will either say "According To Pledge" or "Manual Distribution."

> ***Note:***
>
> *The amount that goes in this box is the total of all that the Giver donates for all the purposes put together for the specified date. In other words, a Giver might have donated $45 for General Giving and $50 for the Building Fund. In this box, you would enter $95. How that is separated is handled by the Giving Distribution.*

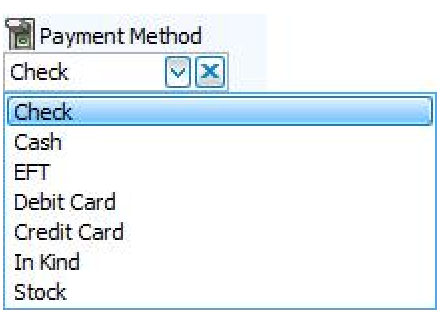
If you need to change the way the money is being distributed, click the  pie chart button to open the Giving Distribution screen:



For example, if your Church has a way of making a specific Giving Distribution to separate accounts by percentage of the total amount that the Giver donates, you can apply that distribution on this screen.

8. **Payment Method**

   Click the dropdown button and choose one of the following payment methods:



9. **Check or Ref #**

   This field allows you to enter a number, if needed for the donation. This is one of the Locking Fields, meaning that you can turn it off if you do not want to fill it out.

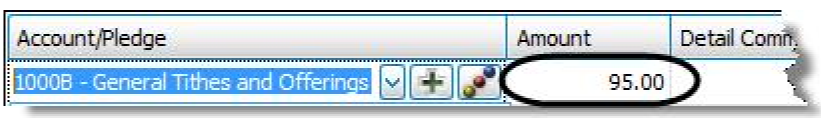
   > For example, cash donations would not need these numbers, so the field could be turned off while entering cash donations and turned on for checks.

10. **Donation Comments**

    In the box, enter any optional information that describes this donation. This is also one of the Locking Fields.

11. **Account / Pledge**

    Click the dropdown button of the box and make the desired selection:



    If you need to Add an Account, click the button and enter the new Giving account information into the **Add Giving Account** screen. If the gift should be credited towards a pledge, be sure that the correct **Pledge Range** dates are showing next to the account name, or the word **Current** for this year's pledges.

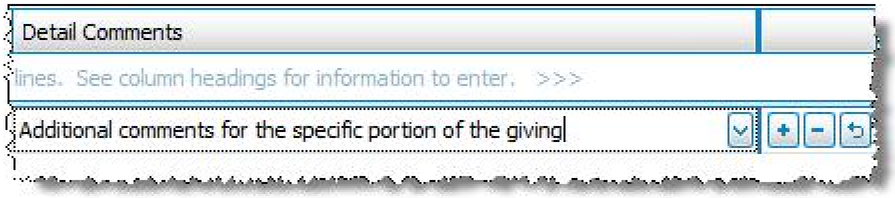
    > ***Note:***
    >
    > *Also, if you would like to see certain accounts show up towards the top of the list that appears when clicking the dropdown button, click the button. You can reorder the way the accounts appear in the list from the Order Giving Accounts screen that appears.*

12. **Amount**

    Once you make an Account selection, the dollar amount entered in the first **Amount** box in **Step 7** will appear in the **Amount** box next to your selection. If needed, change the amount of money that the Giver is donating to the selected **Account** in the **Amount** box.

13. **Detail Comments**

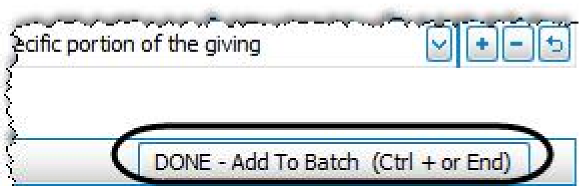
In the box, enter any optional additional information that further describes this specific portion of the donation:



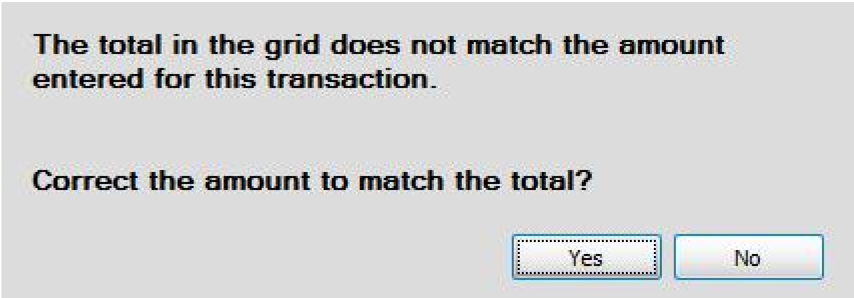
14. If you would like to add multiple entries that altogether make up the details of the one transaction that you are currently entering, press the **Add** button and repeat **Steps 12 through 14** until you are finished completing the details of the transaction. Otherwise, you may proceed to the next step.

If you would like to remove any line from the details of the transaction press the **delete** button. If by chance you press the **Delete** button in error, and would like to bring the line back to where it was, press the **Undo** button.

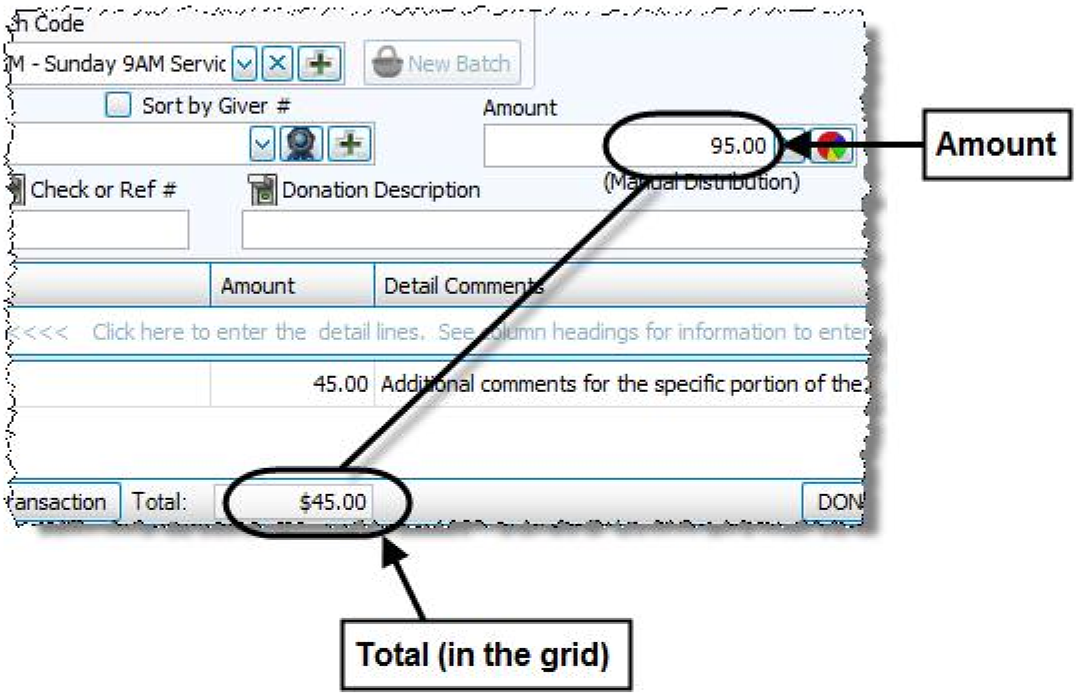
15. When you have added all of the details for the specific Giver's donation, click the **Done — Add To Batch (CTRL + or End)** button (or hit either the **CTRL** and **+** keys, or the **End** key on the keyboard):



16. If the amount you entered in the Amount box does not match the total amount of all giving portions combined, you will get the following message:



As depicted in the following image, the **Amount** does not match the **Total (in the grid)**:



> **Note:**
>
> *Sometimes the **Total** is more than the **Amount**, or vice versa. It depends on the information from which you are entering the giving details. If you find that there is a discrepancy in the two dollar amounts, you must discuss it with whoever has given you the information so that you can enter the information correctly.*
>
> *If you press **Yes** to the message, the **Amount** will be changed to the **Total (in the grid)**. Otherwise, press **No** to manually correct any portion before adding it to the **Unposted Donations Batch**.*

17. **Unposted Donations Batch**
    When the transaction is successfully added to the batch it will appear in the list at the bottom of the screen.

18. If you are more comfortable viewing the items in the **Unposted Donations Batch** section of the screen grouped by the account / fund to which they are being donated instead of grouped by Giver, you can click the **Account** tab on the right side of the **Unposted Donations Batch** window.

Repeat the steps above for each donation you need to enter until you have finished creating the batch of donation transactions. When you are finished, you have the following options available to you:

To make adjustments to any transactions in the **Unposted Donations Batch** area of the screen, first click on any one transaction that contains details that you would like to adjust. Then click **Edit** to make the changes. The transaction will move to the top half of the screen for you to adjust. When finished, click the **Done — Add To Batch (CTRL + or End)** button (or hit either the **CTRL** and **+** keys, or the **End** key on the keyboard) to finish editing the transaction.

To remove any transactions form the **Unposted Donations Batch** area of the screen, first click on the transaction. Then, press **Remove**.

> ***Note:***
>
> *The **Edit** and **Remove** buttons are only available when the **Detail** tab is pressed. They will not show when the **Account** tab is pressed.*

If you would like, you can print a batch report (which has the same format as the Donations Log Report) before saving or posting it. Click **Print** to view a **Print Preview** *(pg 20)* and then proceed in sending the file to your printer. You can also Export the report and/or Send via Email as a file to be used outside of Church Windows.

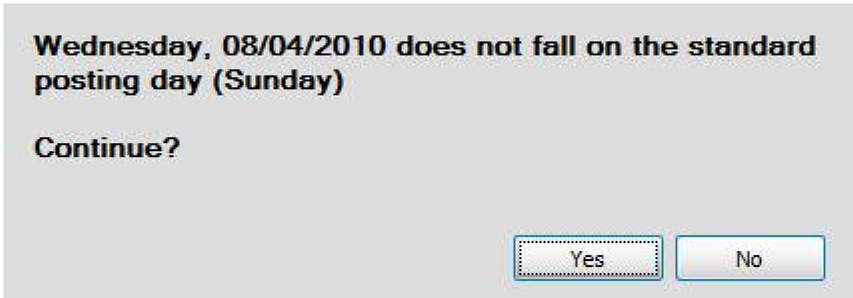
If you would like to save the batch so that you can come back to it at a later time, press **Save Batch**. This will store the donations in Unposted Batches until you are ready to finish and post the batch.

If you would like to post the batch, press **Post**. The donations that you have entered will be recorded as donations that have been entered and will appear in Browse Donations.

If you would like to Transfer Donations to Accounting after you finish posting the batch in the **Donations** Module, click **Post & Transfer**.

Note:

A message might appear on the screen to warn you if the day on which you are posting the batch does not fall on the standard posting day:



*If you are determined to still post the batch, the software will let you do so. Click **Yes** to post the batch, or **No** to choose another posting date. If you would like to make adjustments to the standard posting day, go to* *Donations Settings*.

Manage Givers

The **Manage Givers** screen keeps track of all of the information that is associated with the Givers in your database. The screen is divided into two tabs, **Individual Givers** and **Families & Groups**, which you can use to locate the name of the Giver whose information you want to view or change.

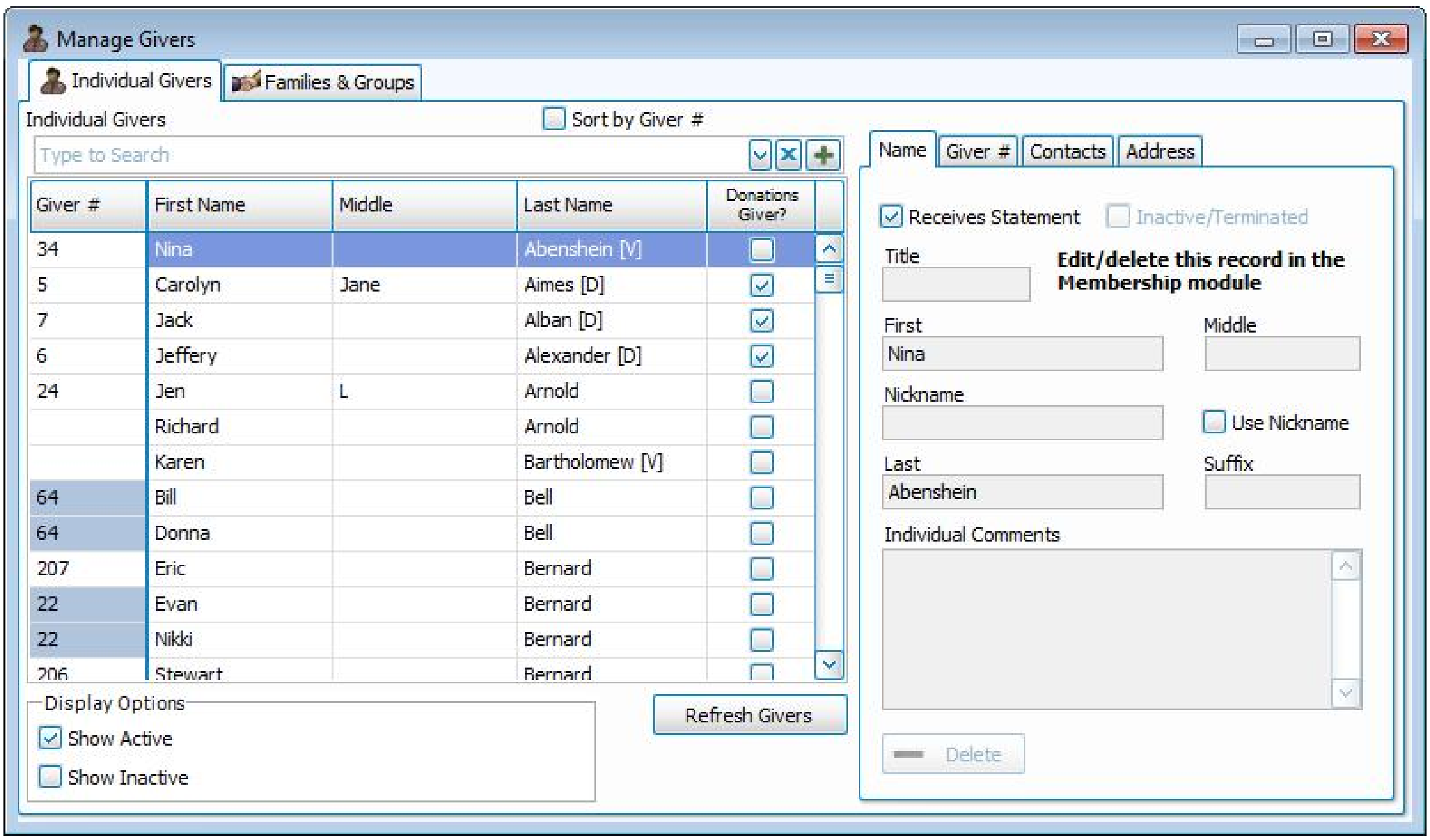
The **Manage Givers** screen can perform the following tasks for Givers and their information:

Add an Individual Giver or a Group of Givers

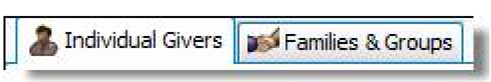
If a Giver is not found in the **Manage Givers** list, you can Add Givers by clicking the **Add** button.

View, Change, or Remove Giver Information

Such information includes the contact and address information. You can also Assign Giver Numbers, change the status of **Inactive** for Donations Individual Givers, or see whether Membership Individual Givers give with their family.



Use the **Individual Givers** tab to look up the desired by first and last name. If you are looking for a family, or for a group of Givers, use the **Families & Groups** to look up the Givers.



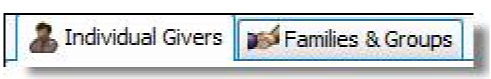
> ***Note:***
>
> *The **Manage Givers** screen combines all of the information that has been entered into The People File in the **Membership*** *(pg 29)* *Module and any Givers entered through the **Donations** Module.*

To access the Manage Givers screen:

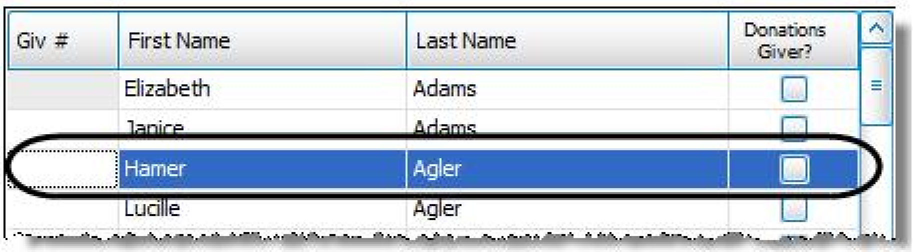
1. Click **Givers** in the **Button Bar** at the top of the screen:

2. Click the **Manage Givers** button:

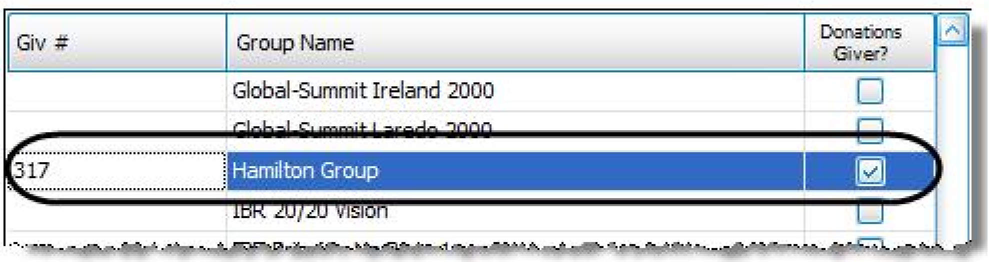
3. Click the tab that best describes the type of Giver that you are looking for:



4. Click the desired name of the **Individual Giver**, **Family**, or **Group** from the list in the larger left portion of the screen.



View of the Individual Givers tab contents.

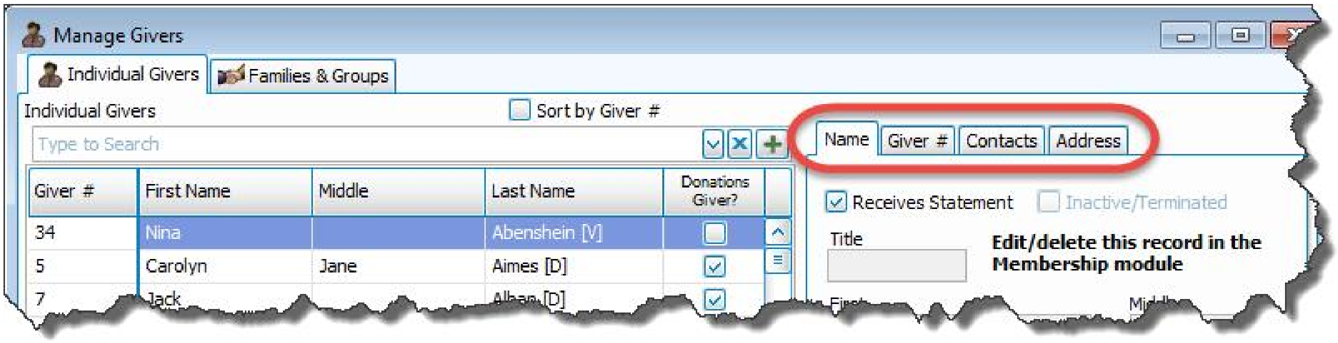


View of the Families & Groups tab contents.

Some of the following columns will appear on both tabs while others will appear on either the **Individual Givers** tab or the **Families & Groups** tab:

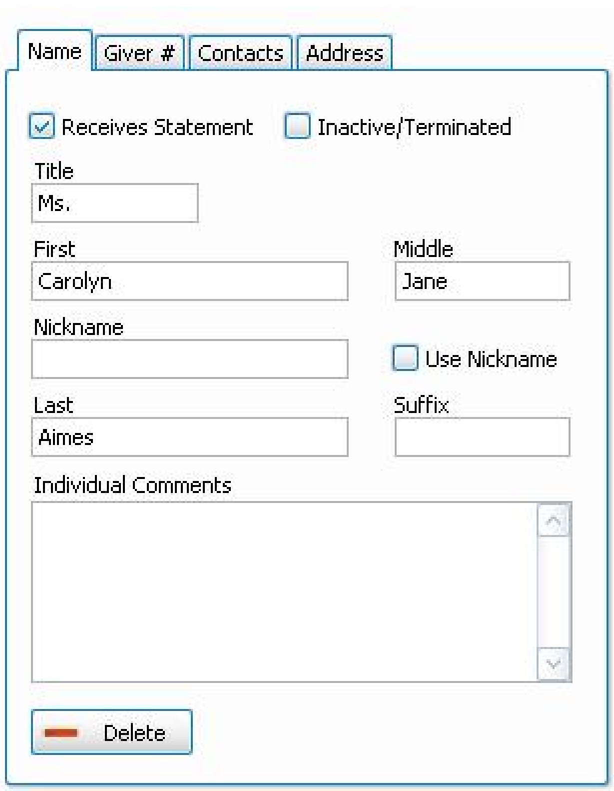
- **Giver #:** The Giver Number which is assigned to the Individual Giver, family, or group on the **Giver #** *(pg 124)* tab or in Manage Giver Numbers.
- **First Name**: The first name of the Individual Giver.
- **Last Name**: The last name of the Individual Giver.
- **Donations Giver?**: A checkmark will show in this box for any Individual Giver, family, or group that was entered into the software as a Donations Individual Givers and is therefore not included in the **Membership** database.
- **Group Name:** The name of the group or family of Givers.

5. Located on the right side of the **Manage Givers** screen are the following four tabs:

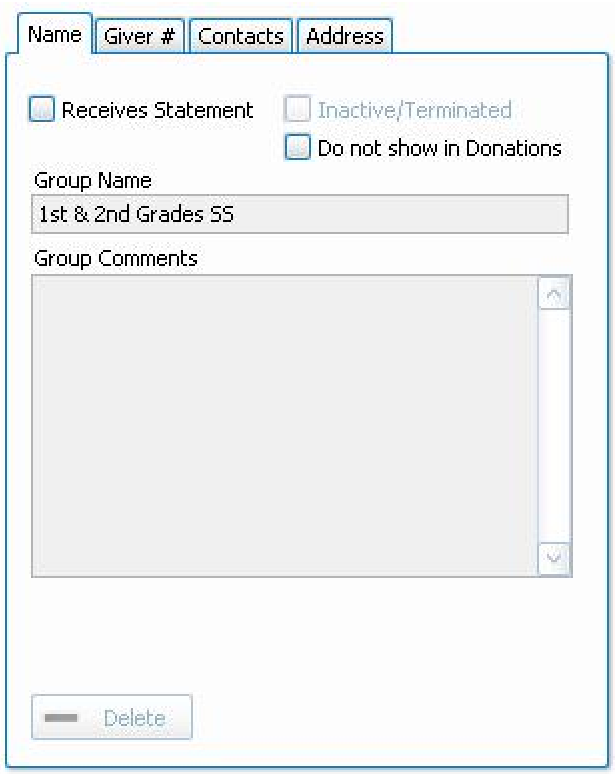


Name

When an **Individual Giver** is selected, the Name tab information will appear like so:



When a **Family or Group Giver** is selected, it will look like this:

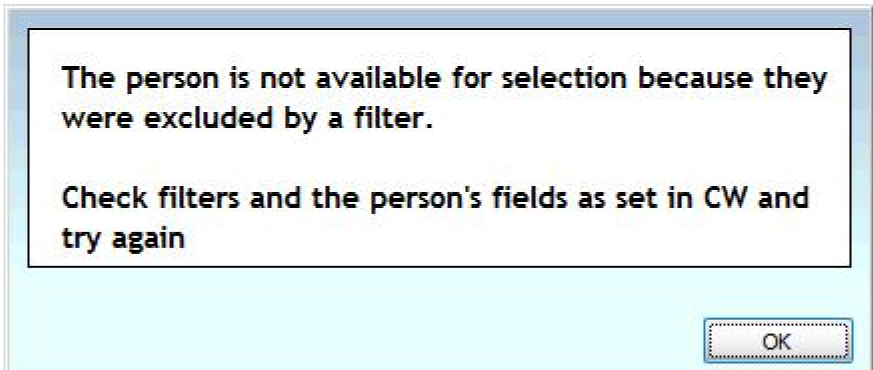


Here you can make changes to the following information:

- **Receives Statement**
  You must place a checkmark in this box if the selected Giver is supposed to receive Donation Statements. If there is no checkmark in this box, the software will not be able to print a statement for the selected Giver.

Note:

If you receive an error message stating that a person was "excluded by a filter":

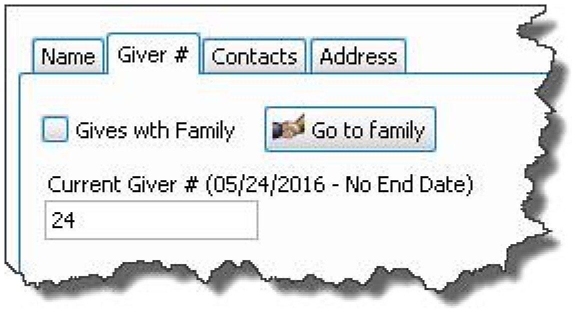


*The **Receives Statement** checkbox is almost always the filter the message is indicating.*

- **Inactive**
  If you place a checkmark in this box the Giver will not appear on any reports or statements. This box is only available for people entered into the software as Donations Individual Givers.
- **Use Nickname**
  If you place a checkmark in this box, whatever name is placed in the **Nickname** box will print on the statement.
- **Individual Comments**
  You can type any additional information about the Giver in the box.
- To remove Donations Individual Givers, click the **Delete** button. This will only be available if you have *never* entered a donation into the system for the selected Giver.

Giver

Change any of the following items, according to what you need to change:



- **Gives with Family**

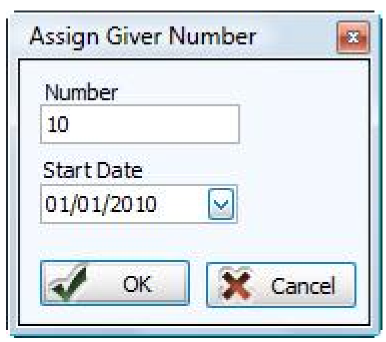
  Place a checkmark in this box to indicate if the Giver is giving with their family:

Giving Separately

- Make sure that the checkmark from the **Gives with Family** box has been removed:

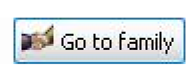
- Click the **Add New #** button:

- Enter the number and start date:



- Click the **OK** button and the item will be highlighted in the list below.

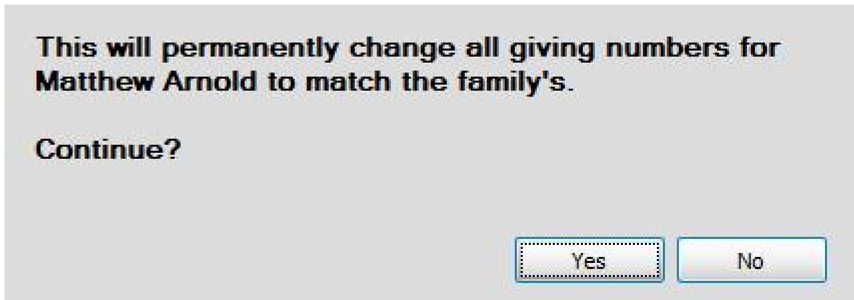
Giving with Family

- Place a checkmark in the **Gives with Family box:**  

- Press **Yes** to make the change, or **No** to refrain from making any changes.

Note:

*If a Giver already had a giving number assigned, you will get the following message. If you press **Yes**, the Giver will no longer have the giving number previously assigned:*

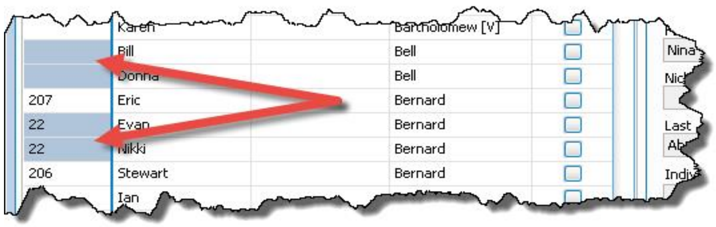


- If you do not get a message at all, your change was made successfully.
- Once the **Go to family** button appears, you have successfully added the individual to the family to which they belong.

Canada Note:

Please also see 'Gives with Family' in CanadaCanada requires that Middle Initials be included on Donation Receipts. In Church Windows, when spouses should receive one combined receipt and are marked Gives with Family (pg 125) the receipt will print the family's Mailing Label instead of printing First Name, Middle Initial, Last Name. Therefore, to avoid the discrepancy, Canadian Churches should either NOT use Gives with Family (pg 125) or should type the Middle Initial in the Mailing Label for those who are marked Gives with Family (pg 125). (pg 201).

- The list on the left side of the Manage Givers *(pg 118)* screen will show a blue box for those Givers you have assigned as **Gives with Family** (and they will have the same Giver Number, if one is assigned).

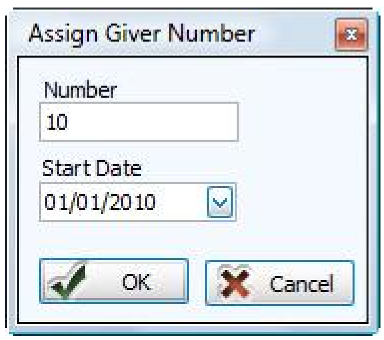


- If needed, you can now enter the Giver Number that the family will share (if one has not already been assigned), use either:

  1. Manage Giver Numbers

     - Click the **Add New #** button:

     - Enter the number and start date:



     - Click the **OK** button and the item will be highlighted in the list below.

  OR

  2. Manage Givers *(pg 118)*

     - Click the **Go to family** button
     - Type the desired number in the empty **Current Giver #** box on the **Giver #** tab.

- You can now assign other numbers or close the window.

- **Go to family**
  Click the button to go to the listing for the family of the currently selected Giver. If the

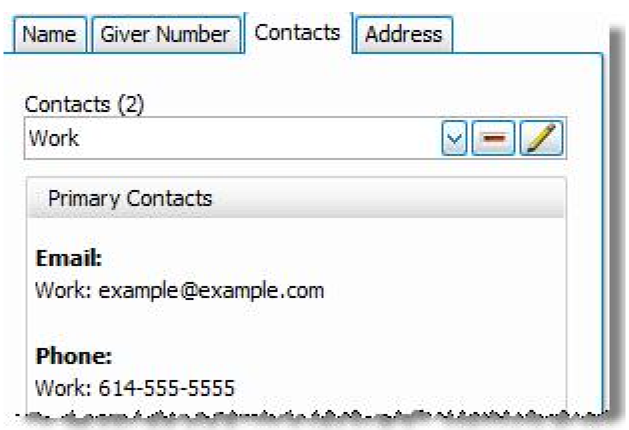
individual does not give with their family, this button will be grayed out.

- **Current Giver #**
  Any number entered in this box will establish that the selected Giver will have this number until a further change is made. The date range for the number will be displayed as well.

> ***Note:***
>
> *Giver #s are no longer required by Church Windows. If your Church does not use physical envelopes or giver numbers in your actual daily operations, you do not need to use them in the software. You can still enter, keep track of, and print Reports, Labels, and Statements for Givers without assigning them numbers.*

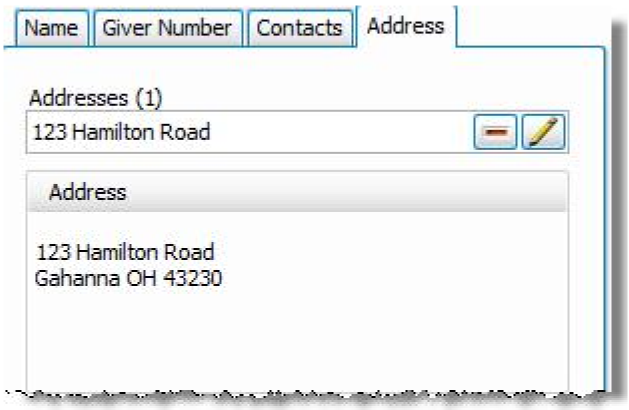
Contacts

Allows you to make any changes to the phone number and/or email information used to contact the Giver:



Address

Allows you to make any changes to the mailing address information:



Note:

*Most of the fields on the **Name**, **Contacts**, and **Address** tabs are only available for editing Givers that were entered as Donations Individual Givers. If the message below does <u>not</u> appear, it will allow you to make any desired changes:*

*If this message does appear, only the **Giver #** tab and the Receives Statement checkbox will be available to edit here. Everything else will need to be edited in The People File.*

Chapter 5 - Accounting

Accounting

The **Accounting** Module of Church Windows is a fund accounting software package for Churches and non-profits that coordinates information from the Donations *(pg 96)* and **Payroll** Modules. The Module allows income and expense tracking, Budgets and Budget Projection, and check writing. It also provides fund accounting financial statements and other Reports. The information kept track of in **Accounting** is based on Transactions applied to a Chart of Accounts that you create using the Chart of Accounts Wizard *(pg 141)*.

The Chart of Accounts is divided into the following types of accounts, each listed below with fictitious, yet applicable examples of what is kept track of in each type of account:

Assets

An Asset is anything of monetary value that your Church **OWNS** as property and controls to its benefit. Some examples of Assets can include bank accounts, investment accounts, as well as cash on hand. The total balance of all the Assets you set up in the Chart of Accounts represents the value of what your Church owns, prior to calculating all the money your Church owes.

> ***Note:***
>
> *The software also provides an Accounts Receivable component that you can use only after activating the **Licensing** (pg 187) key to unlock its functions. If the key is successfully activated, the Assets will contain a separate **Accounts Receivable** ledger for you to keep track of each Client that pays your Church for services your provide. To obtain a key to activate Accounts Receivable, please call our toll-free Customer Service line at 800.533.5227 and ask about purchasing an Accounts Receivable activation key.*

Liabilities

A Liability is something the Church **OWES**. Some examples of Liability accounts can be: payroll deductions, "pass-through" payments, and loans or mortgages. Within the Liabilities, the software provides for you a separate **Accounts Payable** ledger to keep track of money owed to **Vendors and Payees**, from which can then use the software to print Tax Forms for them. The total balance all the Liability accounts you set up in the Chart of Accounts represents all the money your Church owes.

Funds

A Fund is an accounting entity set up to fulfill a designated purpose and to keep all its financial transactions separate from other Funds. In the software, the Fund has a *Fund Balance*, or representation of the total value of the Fund. Each Fund can be linked to at least one **Income** account and/or at least one **Expense** account. The *Fund Balance* can then be raised and lowered according to the transactions posted to the **Income** *(pg 132)* and **Expense** *(pg 132)* accounts.

Most Churches will have a General Operating Fund. They might also have the following: Building Fund; Mission Fund; Outreach Fund; Memorial Fund; Youth Fund. A fund is not always money though; some Churches, for example, will set up a Fixed Assets fund to keep track of the value of the Church building and its contents.

Income

The software provides you with the means to set up an Income account for each source of funding to your Fund. The representation of the money that your Church receives takes place when you post a transaction to an Income account. Because the Income account is linked to some kind of Fund, the transaction then adjusts the Fund Balance by the amount in the transaction.

> For example, suppose that you set up an Income account called "Walk-a-thon Donations" and link it to a Fund account called "General Operating Fund". When you post a transaction to represent the money from the Walk-a-thon, the amount you post will then raise the Fund Balance of the "General Operating Fund".

Expense

The software provides you with the means to set up an Expense account for each representation of money being spent. The representation of the money being spent takes place when you post a transaction to an Expense account. Because the Expense account is linked to some kind of Fund, the transaction then adjusts the Fund Balance by the amount in the transaction.

> For example, suppose that you set up an Expense account called "Office Supplies" and link it to a Fund account called "General Operating Fund". When you post a transaction that represents a bill payment for Office Supplies, the amount you post for the bill will then lower the Fund Balance of the "General Operating Fund".

In the Chart of Accounts, you can also add Sub-Accounts to any accounts that allow it. A Sub-Account is a subordinate account of any already existing account that you set up with the purpose of having its balance serve a part of the balance of its higher-level account.

About Accounting

The **Accounting** Module of Church Windows provides your Church with an interface to apply the fund accounting methods and practices your Church has decided to use to keep track of its financial activities.

For each calendar or non-calendar (fiscal) Accounting Year, you will have a Chart of Accounts, to which you can apply Budgets and Budget Projection amounts and financial Transactions. You can also Print Checks, statements, and Reports that pull up financial information based on the transactions and the accounts they affect. While checks and statements can only be printed, **Accounting** provides Export features where you can either save the report contents to a file or send the contents in a file by email.

Additional features of the **Accounting** Module include a Bank Reconciliation, an optional way to Transfer Donations to Accounting and/or the **Payroll** software, as well as printable tax form data for your Accounts Payable Vendors / Payees.

- From The Initial Portal of Church Windows choose **Accounting**.
- The **Accounting** Portal will have nine different **Quick Access Buttons** in the center of the screen for the most commonly used functions.
- Access to every available option in the **Accounting** Module is available in the **Button Bar** at the top of the screen

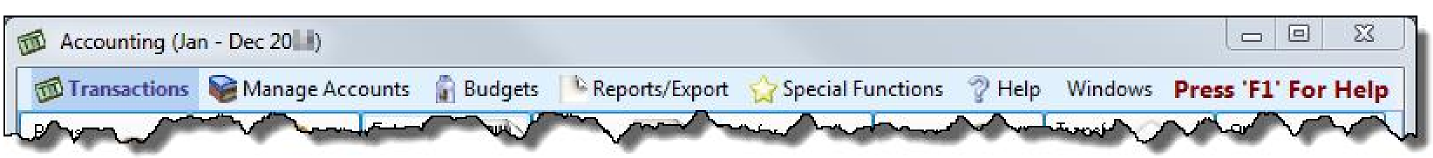
Quick Access Buttons

? Help — This is the **Help** button which will open this help interface (you can also press the **F1** key on your keyboard from anywhere in Church Windows to bring you to the relevant section of these help files).

Manage Accounts, Reports, Budgets and Budget Projection, and Bank Reconciliation

Enter Income, Enter Bills, Pay Bills, and Print Checks

Button Bar

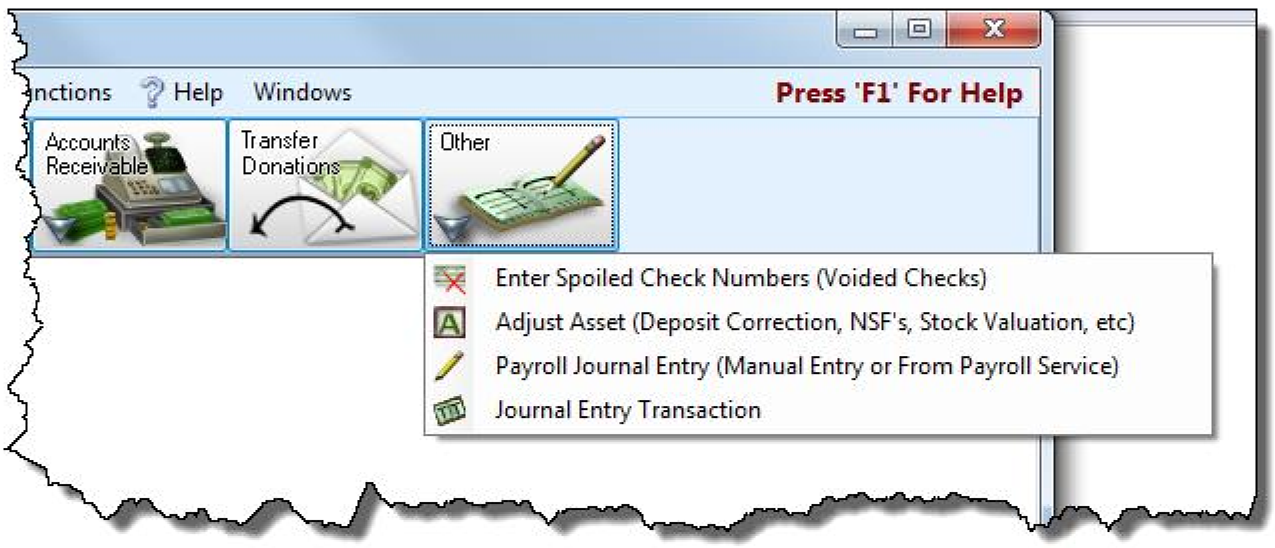


Transactions

This menu includes:

Browse Transactions, Enter Income, Enter Bills, Pay Bills, Transfer, Accounts Receivable, Transfer Donations to Accounting

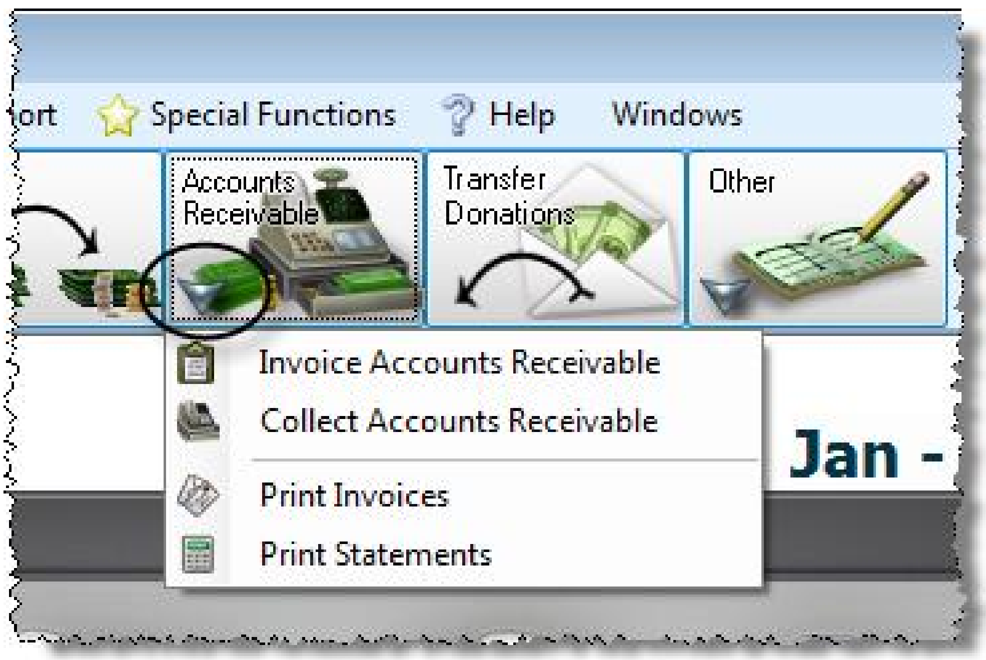
The "Other" button provides functions to Enter Spoiled Check Numbers (Voided Checks), Adjust Asset Account, Payroll Journal Entry , and Journal Entry Transactions:



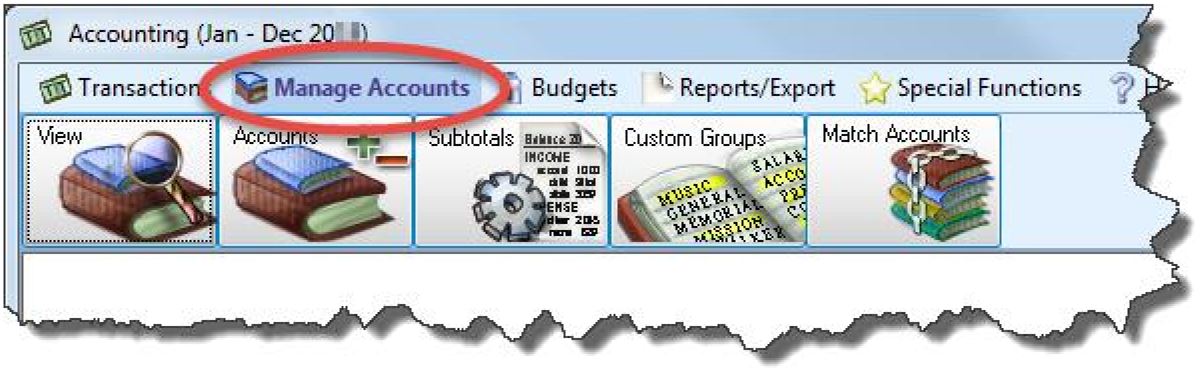
Note:

*The software also provides an Accounts Receivable component that you can use only after activating the **Licensing** (pg 187) key to unlock its functions. If the key is successfully activated, the Assets will contain a separate **Accounts Receivable** ledger for you to keep track of each Client that pays your Church for services your provide. To obtain a key to activate Accounts Receivable, please call our toll-free Customer Service line at 800.533.5227 and ask about purchasing an Accounts Receivable activation key.*

The Accounts Receivable portion of the Accounting Module provides the following additional options:



Manage Accounts

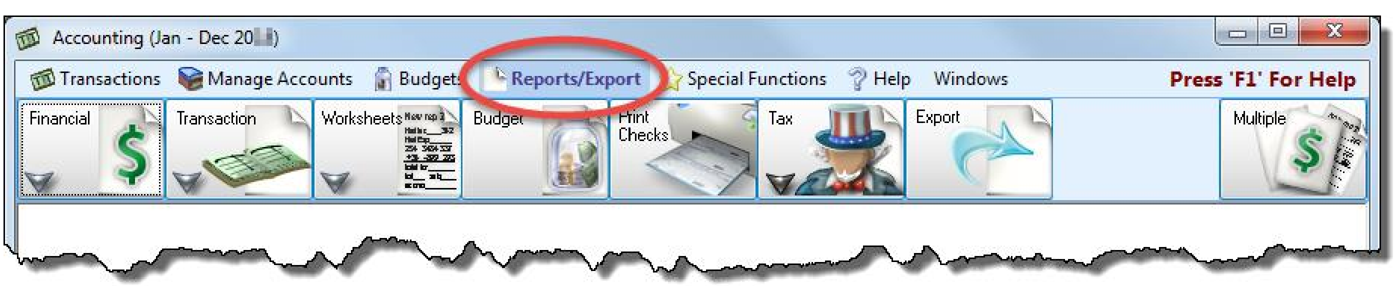


Choice here include View Accounts, Add an Account, Subtotals, Custom Account Groups, and Match Accounts.

Budgets

Budget options include Budgets and Budget Projection as well as Budget Report.

Reports/Export



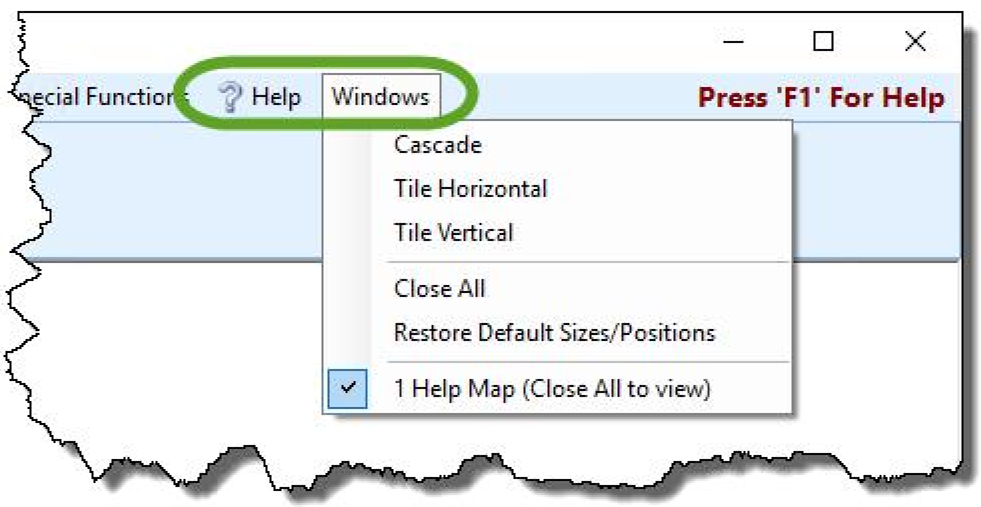
Here you have several categories of reports: Financial Reports, Transaction Reports, Worksheets, Budget Report, Print Checks, Tax Forms, and Export.

Special Functions

Special Functions include Bank Reconciliation, Accounting Settings, Link Donations to Accounting, Manage Years, Change Account Number Structure, and Prior System Checks.

Help and Windows

The final two options in the Button Bar across the top of the screen are **Help** and **Windows**.

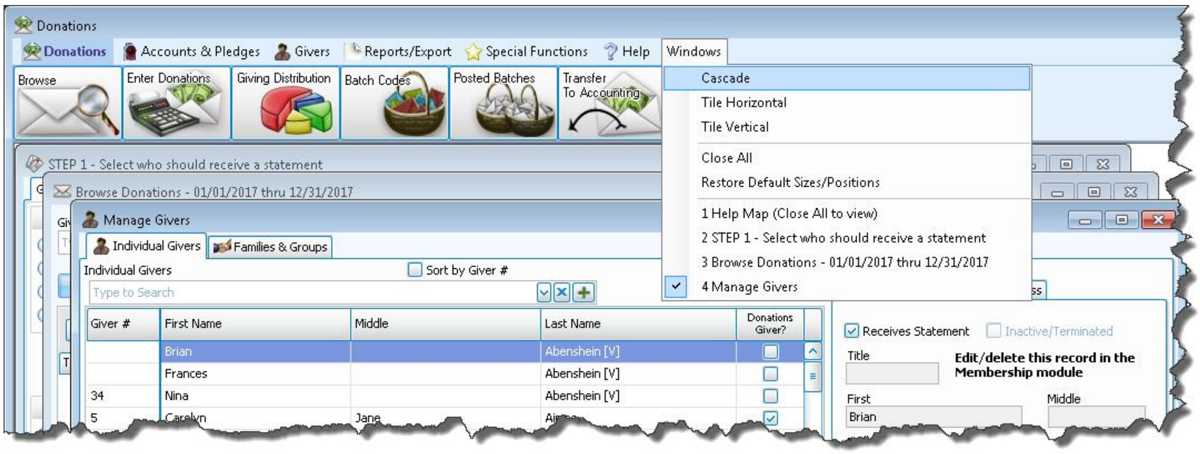


? Help is a quick link to bring you to these help files. You can also always press **F1** on your keyboard to go to the specific area of these help files relevant to the screen where you pressed the **F1** key.

The **Windows** dropdown menu is divided into three sections which allow you to adjust how your windows or screens appear in the current Module. These options are quite handy when multitasking with various functions in the software.

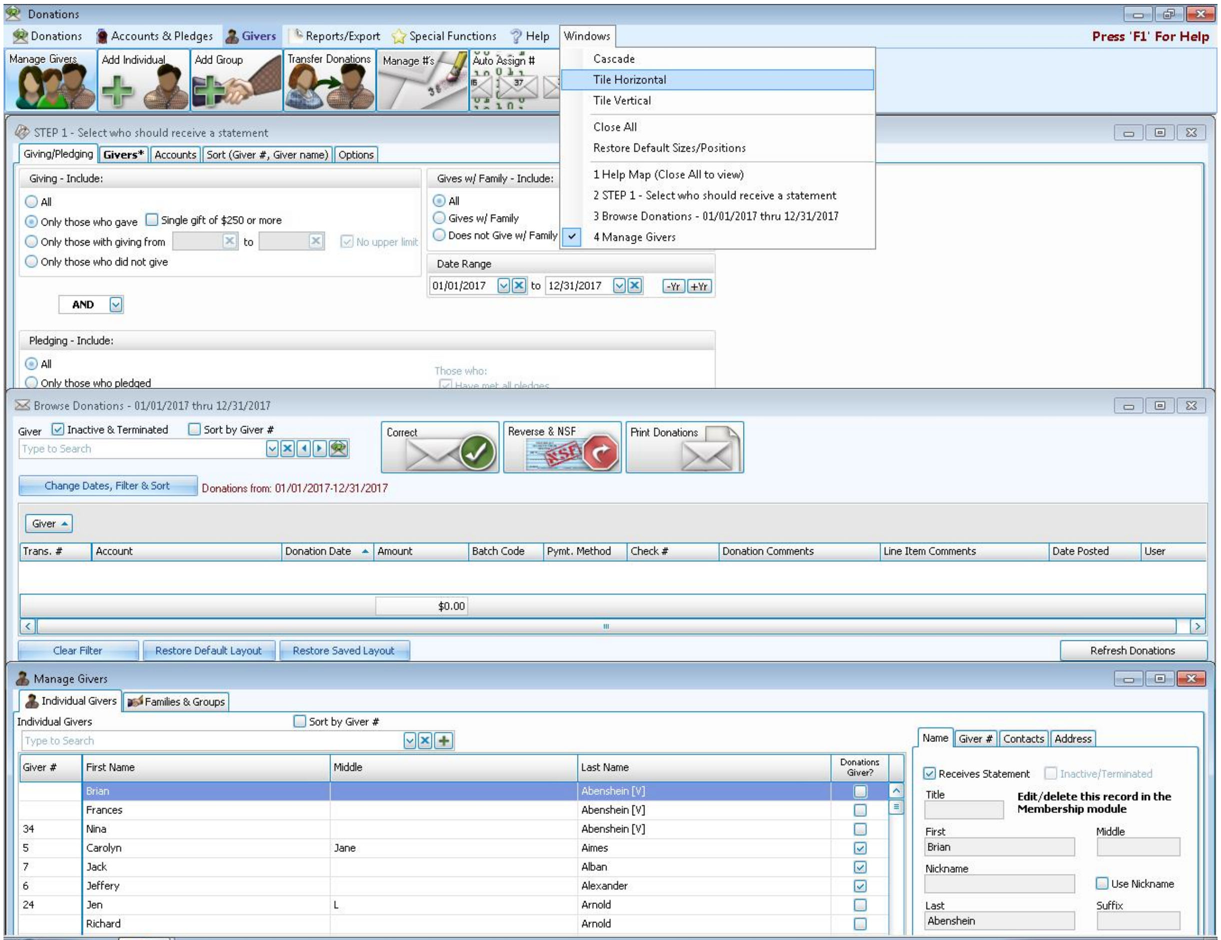
1. The first section provides three choices for arranging the current set of open windows:

    - **Cascade**
      Displays the windows in a staggered formation, starting in the top left corner and continuing down and to the right in small increments:



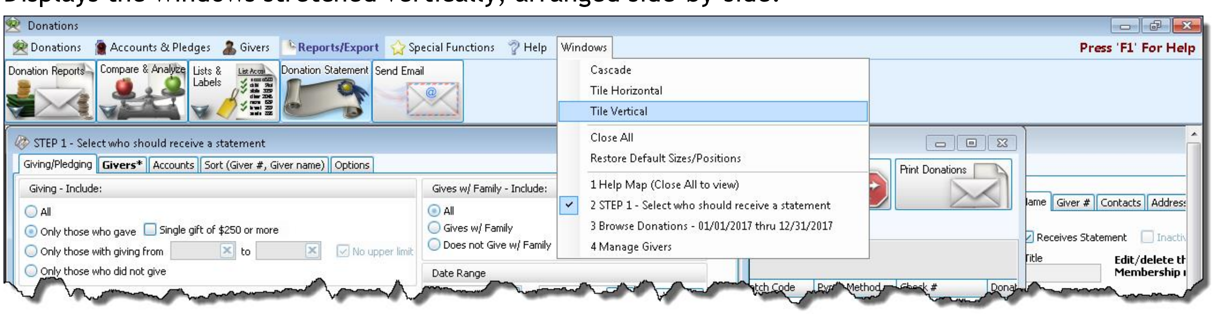
- **Tile Horizontal**

  Displays the windows stretched horizontally, stacked top to bottom:



- **Tile Vertical**

  Displays the windows stretched vertically, arranged side-by-side:



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2. The middle section in this menu includes two functions:

   - **Close All** — This will close all open windows in the current Module (useful for functions that require you to close all other windows).

- **Restore Default Sizes/Positions** — This choice will **Restore screens to their original size and position** *(pg 17)*

---

3. The bottom section contains a list of each of the windows that are currently open. Clicking on one of them will bring that window to view in front of the other open windows.

Chart of Accounts Wizard

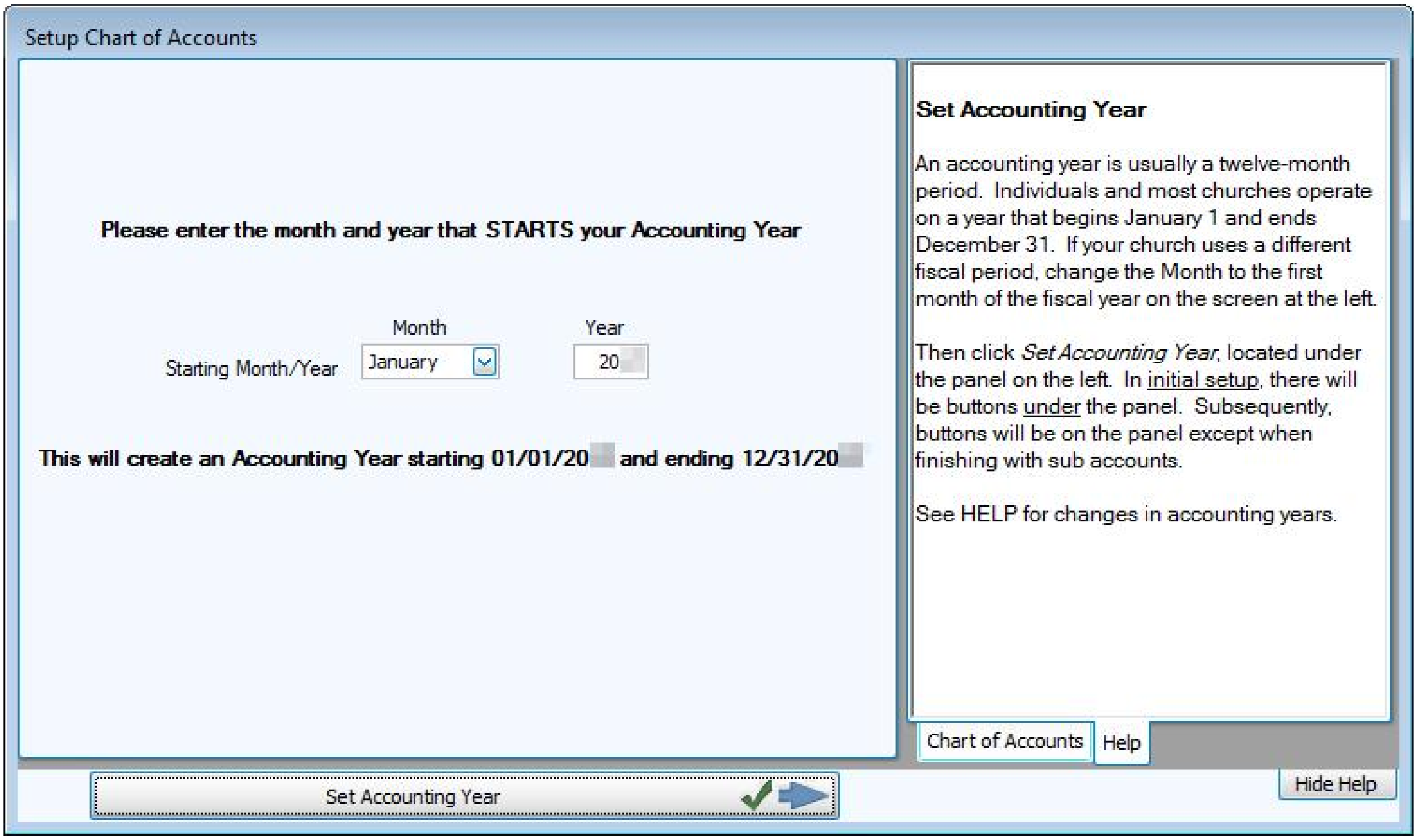
When the software does not yet contain a Chart of Accounts for any fiscal year, the AccountingModule will automatically guide you through setting them up with the following series of steps:

- **Step 1: Set the Accounting Year** *(pg 141)* — Choose a calendar or fiscal year setup.
- **Step 2: Decide Whether to Use Account Numbers** *(pg 143)* — If using numbers, set a numerical structure.
- **Step 3: Set up your Funds and Income/Expense Accounts** *(pg 144)* — Design the funds and their income / expense accounts.
- **Step 4: Setting up Assets, Liabilities, Vendors, and Payees** *(pg 148)* — Enter the rest of the Chart of Accounts.
- **After Using The Setup Wizard** *(pg 149)* — Final topics and features to understand before getting started with the **Accounting** Module.

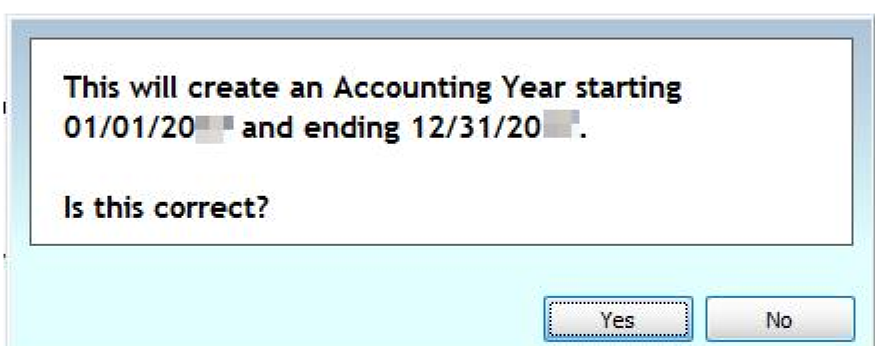
Step 1: Set the Accounting Year

The first step is to define the Accounting Year, or fiscal year, by entering the month on which it begins in the current year. The Chart of Accounts, the Budgets and Budget Projection amounts, and the Transactions you save and post to the accounts are kept track of in an Accounting Year that must be set up and managed from one year to the next.

Anytime during your currently active Accounting Year, you can set up the new Accounting Year and begin working in it long before the current year is finished. You can then move back and forth between the years, continuing to record transactions in the current year while working to get the next year ready. This can also be changed later, if needed, using Manage Years.



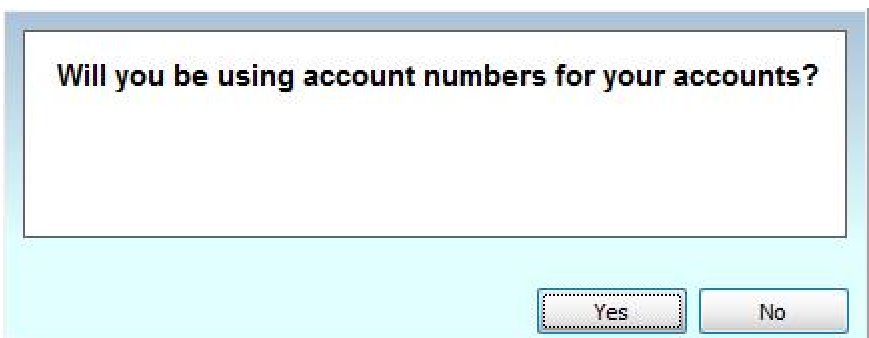
- Review the **Starting Month / Year** to make sure that it matches the fiscal year applicable to your Church.
- To change the current setting of the **Month**, click the dropdown button next to the box that reads "January", and click the desired month from the list that appears.
- Also, you can adjust the **Year** by removing the year currently showing and typing the desired year.
- Click the **Set Accounting Year** button to apply your settings.
- A message will prompt you that "This will create an Accounting Year starting [*on the first day of the chosen* ***Month*** *and* ***Year***] and ending [*on the last day of the one-year period*]." The message will also ask you "Is this correct?"



- Click **Yes** or **No** to answer the question:
  - By clicking **No**, you will be given the option to choose a different month and year before proceeding.
  - Clicking **Yes** will take you to the next step — **Step 2: Decide Whether to Use Account Numbers** *(pg 143)*.

Step 2: Decide Whether to Use Account Numbers

You have a choice to include Account Numbers in your Chart of Accounts structure, or organize Chart of Accounts in alphabetical order (this can be changed later, if needed, using Change Account Number Structure). After you complete **Step 1: Set the Accounting Year** *(pg 141)*, a message will prompt you with the question "Will you be using account numbers for your Accounts?"



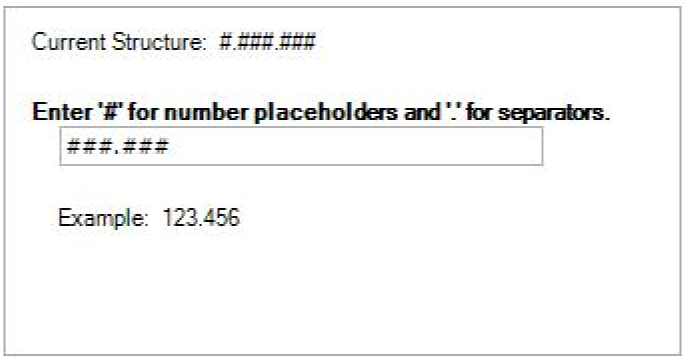
In this step, apply your decision of either using numbers in your Chart of Accounts, or not, by clicking **Yes** or **No**.

To decide on whether or not to use numbers in your Chart of Accounts, examine your personal list of accounts to be added to the Chart of Accounts in the software.

- If, for example, you find that your Chart of Accounts is very small and straightforward, you might not need numbers.
- On the other hand, you might find that having Account Numbers will help make more straightforward a seemingly more complex Chart of Accounts structure.

> ***Note:***
>
> *Church Windows is set up to accommodate the use of account numbers for any Church that uses a numbering system to organize the list of accounts, labeled in the software as the Chart of Accounts. If you choose to use account numbers, the Chart of Accounts will be organized in numerical order. Otherwise, the Chart of Accounts will be organized in alphabetical order by account name when you finish the setup wizard.*

If you choose **Yes**, you will be brought to a screen to specify the structure of the account numbers you wish to use in the Chart of Accounts.



- Type any combination of '**#**' (pound signs) for your account number *placeholders* and '**.**' (decimal points) for any *separators* you wish your account numbers to have.
- The account number can have from 3 to 12 placeholders and up to 5 separators.
- When you are finished typing your desired account number structure, click the **Use this Structure** button.
- If you click **No**, you will not be asked to enter any information regarding an account number structure. Instead, you will be brought to the **Setup Chart of Accounts** screen to begin **Setting up Main Funds**.

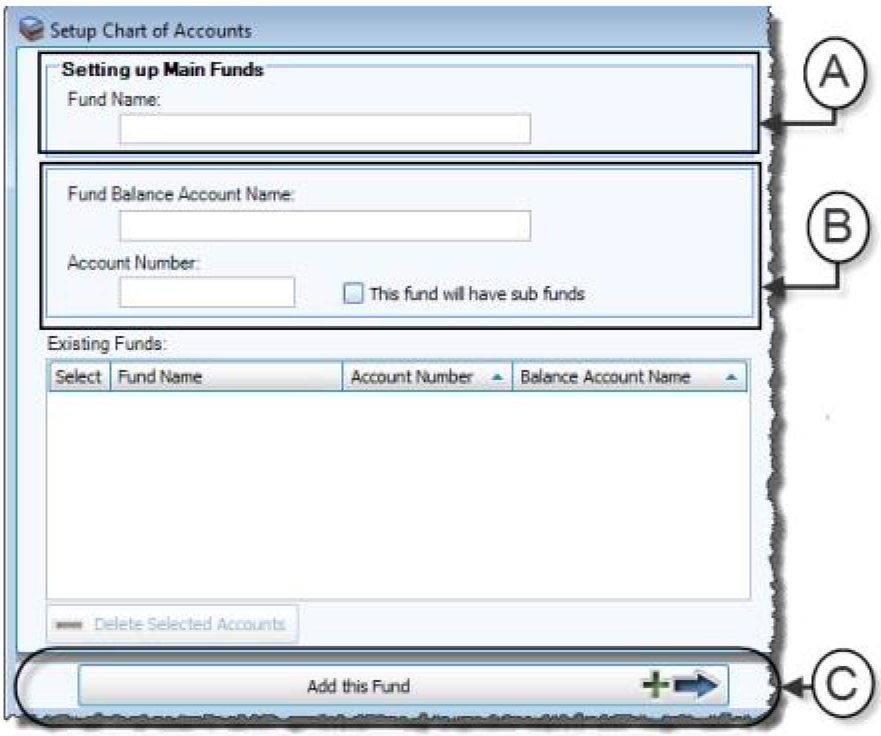
Once you have made your numbering decisions, proceed to the next step — **Step 3: Set up your Funds and Income/Expense Accounts** *(pg 144)*

Step 3: Set up your Funds and Income/Expense Accounts

After completing **Step 2: Decide Whether to Use Account Numbers** *(pg 143)*, this portion of the Wizard will provide you with the means to enter the list of **Funds** *(pg 131)* for your Chart of Accounts. Each Fund can contain at least one **Income** *(pg 132)* and/or at least one **Expense** *(pg 132)* account. If you choose to set up a Sub Fund for any Main Fund in the list, the Wizard will then allow you to add at least one Income account and/or at least one Expense account to each Sub Fund.

Setting up Main Funds

Using the image below as a guide for setting up your funds:



A. Enter the **Fund Name**

B. Enter the **Fund Balance Account Name** and **Account Number** for each fund.
Click to mark the ☑ checkbox if **This fund will have sub funds**, if not leave it empty.

C. Then, click the **Add this Fund** button.

The information in the top portion of the screen (indicated with an **(A)** in the image above) will change according to whether you are setting up a **Main Fund**, **Sub Funds**, **Income** *(pg 132)* accounts, or **Expense** *(pg 132)* Accounts. While the top portion of the screen will indicate the specific location in the Chart of Accounts where you are adding the account or fund, the rest of the screen will ask for similar types of information (a name, possibly a number, and a checkbox to allow for Sub-Accounts or funds).

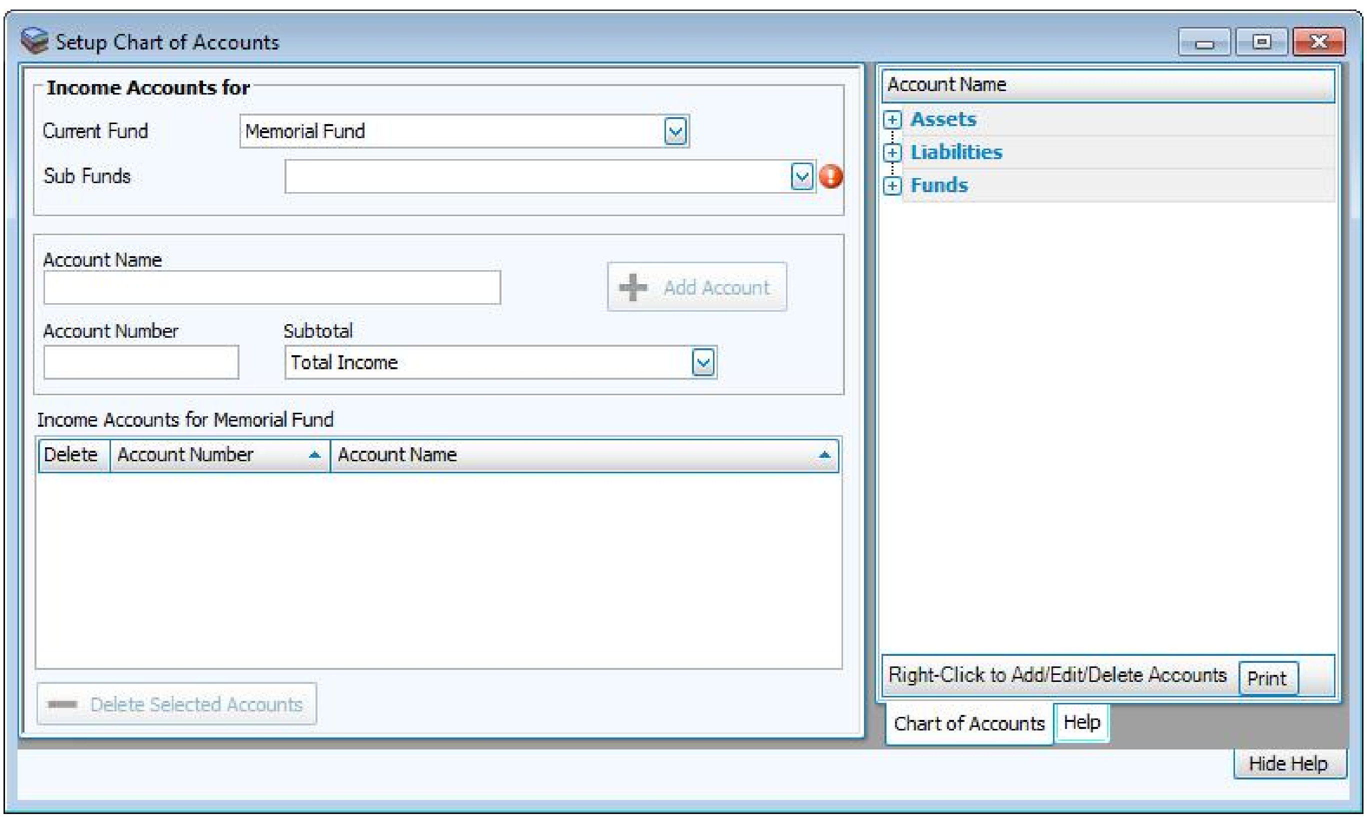
Setting Up a Sub Fund

If you have checked the box labeled "This fund will have sub funds", you will be taken to a screen to begin Setting up Sub Funds for your Fund.

- Enter the **Sub Fund Name**, **Sub Fund Balance Name**, and **Account Number** (if applicable).
- Then click the **Add Sub Fund** button at the bottom of the screen.
- After you click **Add this Fund** (or **Add Sub Fund**, if adding a Sub Fund) at the bottom of the screen, you will be asked, "Will there be Income accounts for [the name of the fund or sub fund]?"
- Click **Yes** or **No** to answer the question.

Adding Income Accounts

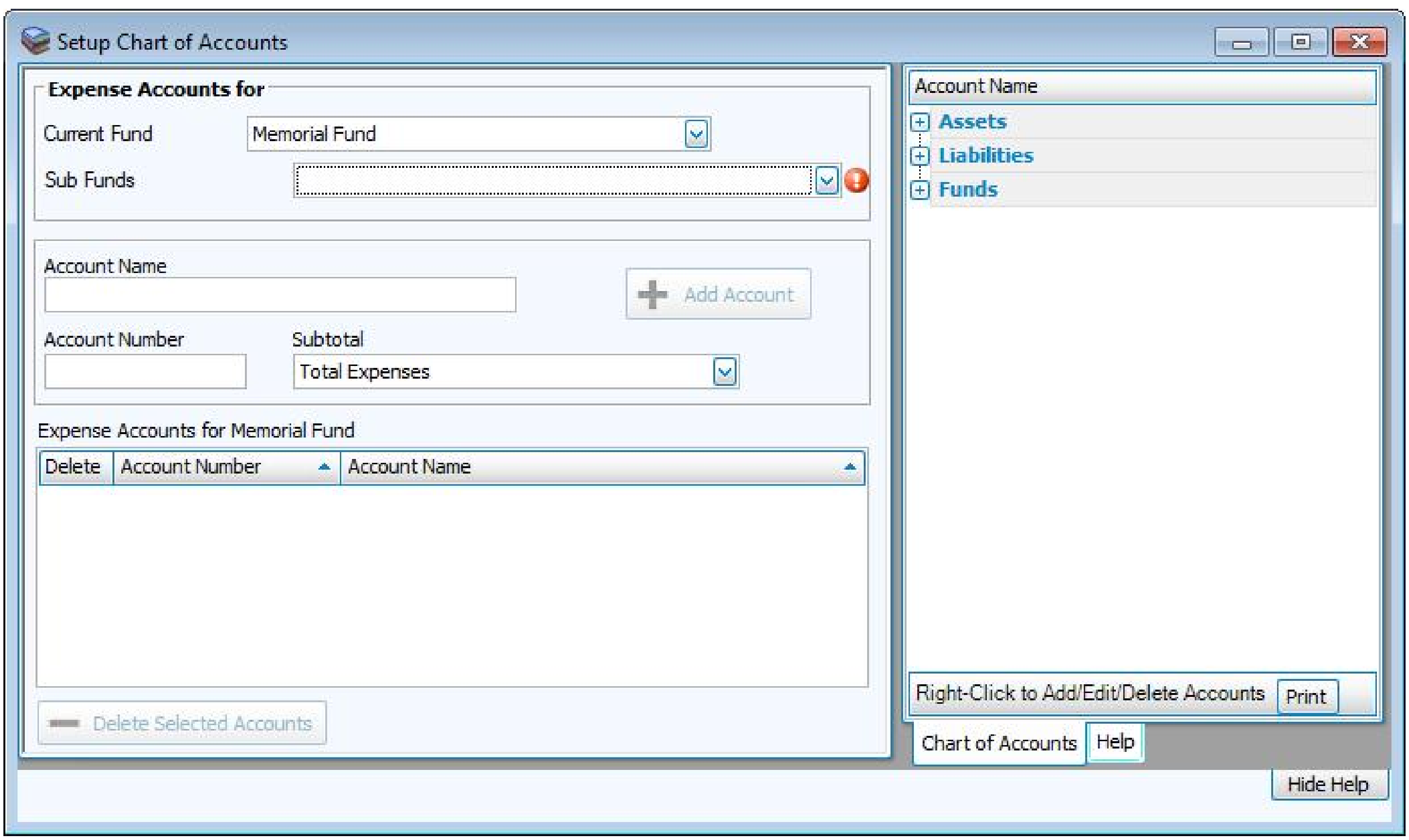
- If you click **Yes**, enter the **Account Name** and **Account Number** for the Income account and click the **+ Add Account** button.



- **Sub-Accounts**
  - If the account is part of a main fund (and not a sub fund), you will be able to add sub-accounts by placing a check in the box that says "**This account will have Sub-Accounts**" before hitting the **Add Account** button.
- Repeat for each Income account of the fund or sub fund you are currently setting up.
- When finished, click the **Finished with Income Accounts [for the fund or sub fund]** button at the bottom of the screen.
- You will then be asked "Will there be **Expense** *(pg 132)* accounts..."
- Click **Yes** or **No** to answer the question.

Adding Expense Accounts

- If you answer **Yes**, proceed in adding your expense accounts in the same manner as you entered the income accounts.



- **Sub-Accounts**
  - If the account is part of a main fund (and not a sub fund), you will be able to add sub-accounts by placing a check in the box that says "**This account will have Sub-Accounts**" before hitting the **Add Account** button.
- When finished adding your Expense accounts, click the button to confirm doing so at the bottom of your screen.
- You will then be asked if you would like to set up another Fund or sub fund. Click **Yes** to repeat the process of adding the necessary accounts for each fund.

When finally finished with all of your funds and their respective income and expense accounts, click **No** to answer the question "Would you like to setup another fund?" and proceed to the next step in the Wizard — **Step 4: Setting up Assets, Liabilities, Vendors, and Payees** *(pg 148)*

Step 4: Setting up Assets, Liabilities, Vendors, and Payees

After completing **Step 3: Set up your Funds and Income/Expense Accounts** *(pg 144)*, the next screens in the Wizard will guide you through first, building your list of **Assets** *(pg 131)*, then Accounts Payable **Vendor / Payee** names, and lastly the **Liabilities** *(pg 131)*. If you have activated the **Licensing** *(pg 187)* key to use the Accounts Receivable portion of the software, you will be brought to a screen to set up the list of **Clients** beforehand.

Assets and Liabilities

- The Accounts Payable Vendor / Payee list resides as a ledger in the list of **Liability** accounts. If you have activated the license to use Accounts Receivable, it will reside as a ledger among the **Asset** accounts.
- Enter the **Account Name** and **Account Number** (if applicable) for each account you wish to add to the list.
- If applicable, establish that "**This account will have Sub-Accounts**" by placing a check in the box.
- Click the **Add Account** button to proceed. Keep adding your accounts until you have finished.
- Then click **Finished with [the type of account or Sub-Account you have added]**. Continue to **After Using The Setup Wizard** *(pg 149)* for the next steps.

Vendors, Payees, and Clients

- If you have chosen to use **Account Numbers** in your Chart of Accounts, the Accounts Payable list of **Vendors** and **Payees** requires you to enter one **Account Number** to represent the entire list.
- The same is true for the Accounts Receivable list, provided you have activated the **Licensing** *(pg 187)* key to use this Module.
- Choose an account number for each portion and click the **Set Account Number** button to proceed. (You can always Change Account Number Structure later if you need to.)
- Set up your list of **Payees** (and **Clients**, if applicable) by entering the **Account Name** or selecting **Choose from Membership** to add someone from The People File and clicking the **Add Account**.
- If you need to enter the address and other information for the **Vendor** (or Client, if applicable), click the name you added to the list.
- Then, click the **Vendors** (or **Client**) tab to reveal the screen where you can add any additional information.
- When you are finished setting up your list, click the **Finished with [the type of accounts]** button at the bottom of the screen and proceed to the final screen in the Wizard.

After Using The Setup Wizard *(pg 149)*, use Manage Accounts to review your new Chart of Accounts and explore Church Windows Accounting.

After Using The Setup Wizard

Once you have finished the **Chart of Accounts Wizard** *(pg 141)*, the **Accounting** Module will enable full functionality to the active software menus. You then have the choice to click the **Manage Accounts** button and make any additional adjustments to your Chart of Accounts that were not made during the Setup Wizard. Below is a list of features to review and understand after using the Wizard.

Beginning Balances

Each Asset, Liability, and Fund Balance account has a balance that represents the value of the account at the beginning of the Accounting Year, called the Beginning Balances. After using the setup wizard to set up your accounts, the Beginning Balances will not yet be set. You can enter the Beginning Balances into the software and save your changes at any time. You have until the end of the Accounting Year to assess the accurate Beginning Balances. When you are ready to make a final commitment to the Beginning Balances for the Accounting Year, you should Finalize Beginning Balances. Doing so will allow you to set up a new Accounting Year as time moves forward from one year to the next.

Budgets

Use the Budgets and Budget Projection features in **Accounting** if your Church sets forth plans to spend and gain certain amounts of money each year for its funds. The Budgets feature will display all the **Income** *(pg 132)* and **Expense** *(pg 132)* accounts you have added to the Chart of Accounts, each with a setting for you to enter Monthly, Quarterly, or Annual budget amounts.

Reports

When you run Reports in Accounting, you have the choice to print it onto paper, Export it to a file that is viewable on a computer outside of the Church Windows software, or Send via Email to someone. All the reports that can be run in the software are found under the **Reports / Export** menu in the Button Bar. The Reports menu also includes features to record payments then Print Checks and create Tax Forms to give to the Accounts Payable Vendors / Payees listed in your Chart of Accounts. Either one report can be run at one time, or Multiple Reports can be set to run one at a time in a customizable sequence.

If you have activated the **Licensing** *(pg 187)* key to use the Accounts Receivable portion of Accounting, you can use the Reports menu to Accounts Receivable Invoices and Accounts Receivable Statements for each Client.

Subtotals

Each **Accounting** report that has a total line will show one or more of the following: Total Assets, Total Liabilities, Total Fund Balances, Total Income, and Total Expenses. Within these total lines, you can set up Subtotals and add sets of accounts. If a report is set to show the subtotal line, the subtotal line will show the total balance for the set of accounts.

Bank Reconciliation

Each month, more or less, your bank(s) will issue you a statement to show you the activity for the accounts your Church has opened with them. Use the Bank Reconciliation feature in **Accounting** to update and compare your financial records with the bank's confirmation of those transactions actually having cleared. The Bank Reconciliation gives you the opportunity to also account for the Charges and Interests that the bank account has incurred, as well as verify the Deposits and Withdrawals that have been made. The Bank Reconciliation can be saved multiple times until you are ready to bring closure to, or finalize, the Bank Reconciliation.

Prior System Checks

On the date you decide to start using the **Accounting** Module, you might have outstanding checks that you have not yet accounted for as having cleared the bank. While you wait to receive a statement to verify that the checks have cleared, be sure to enter the information for these types of checks on the Prior System Checks screen. When you receive the bank statement, run the Bank Reconciliation for the corresponding Asset and mark the checks listed on the statement as "Cleared" in Accounting.

Accounting Year Management

Each Chart of Accounts and the transactions applicable to it are kept track of in distinct fiscal years, called Accounting Years, in the **Accounting** Module. While you are working in the current Accounting Year, the Manage Years feature found under the Special Functions menu gives you the option to set up a new Accounting Year, update its Beginning Balances, set up its Chart of Accounts, and update its Budgets and Budget Projection amounts. Other features include switching between Accounting Years to view the Transaction Journal and Reports, and even implementing any changes your Church might be making to its fiscal year duration.

Link Donations to Accounting

If you plan to use the **Accounting** Module to keep track of Giving entered in the **Donations** Module, the next step is to link the **Donations** Module accounts to the accounts in the **Accounting** Module. After you are finished with the **Chart of Accounts Wizard** *(pg 141)*, you can Link Donations to Accounting on the **Default Account Links** tab of the Transfer Donations to Accounting screen.

By having accurately established the above items, you can post Transactions to your accounts and generate Reports that accurately reflect the financial progress of your Church. The Accounting Settings that are found in these features can be changed throughout the Accounting Year unless a setting in the specific feature has been finalized.

Chapter 6 - Payroll

About Payroll

This help documentation covers Church WindowsPayroll, Version 23, released in 2021.

Conversion Information

Payroll had a major update in 2021 when it went from a separate application to full integration into the rest of Church Windows's Church Management suite of programs. We're excited to present a host of new features, more efficient work flows, and an updated user interface, but understand that significant changes to software can be stressful as you learn to navigate. We've attempted to put together a library of guides, videos and resources to make that transition as intuitive and easy as possible. Click here to navigate to the most up to date tools on our website. This page will provide a summary on navigating Payroll's new screens.

Opening Payroll

When you click on the Payrollbutton from the Opening Church Windows *(pg 3)*, it will open the window we will call the Payroll Portal. This will have seven different **Quick Access Buttons** in the center of the screen as well as a **Button Bar** across the top of the screen.

Quick Access Buttons

Dashboard - This button brings you to the dashboard - a quick summary of your data in visual form.

? - This button brings you to the Payroll help files, as does the help button at the top menu. You can access a help page related to the screen your own, by pressing your F1 key.

Employees/ Contractors - This pulls up your files on your employees and independent contractors. Here is where you can add payees, adjust pay rates, enter allowances and deductions, and manage their records.

Reports - This button pulls up the Reports Button Bar

Print Checks - This short cuts brings you to the window that allows you to reprint replacement checks or print a first run of checks that have already been generated. You can also find this on the top menu and button bar under Payroll > Print Checks.

Calculate Payroll - This short cut brings you to the Calculate Payroll window to run your pays. You can also find this on the top menu and button bar under Payroll > Calculate Payroll.

Transfer to Accounting -This short cut opens the Transfer to Accounting window that will send your Payroll calculations to the Accountingmodule. You can also find this on the top menu under Special Functions > Transfer to Accounting.

Electronic Filing - Description

Button Bars

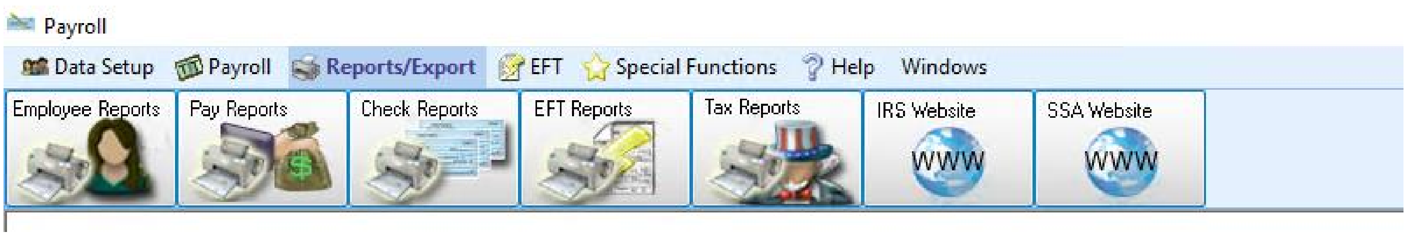
Data Setup

- The Employees/Contractors buttons opens your files that you have on people who are paid by the Church
- The Departments buttons opens a dialog allowing you to add, remove, and define deparments.
- The Pay Labels button allows you to set up definitions for types of pay such as vacation or sick time.
- The Allowances button allows you to define allowances like housing or cell phone.
- The Deductions button allows you to define deductions like health care or life insurance.
- The Misc Tax button allows you to enter applicable taxes.
- The Local Tax button brings up a wizard that allows you to enter things like school district taxes.
- The Tax Rates/Wages buttons opens a dialog where you can enter defaults.

Payroll

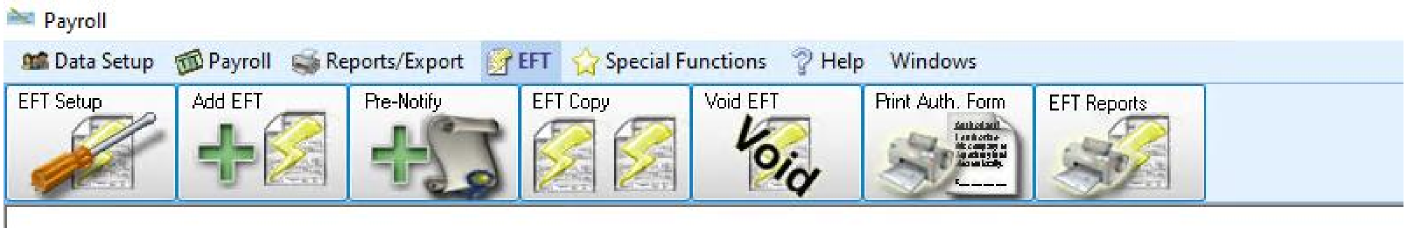
- The Calculate Payroll button runs the payroll wizard. You can also use the short cut on the portal screen to get to this window.
- The Calculate Adjustment button allows you to make changes to a pay you've already posted.
- The Calculate Bonus button allows you to create an additional check for someone.
- The Group Term Life button calculates costs for tax filings
- The Group Health button calculates costs for tax filings
- The Void Individual Pay allows you to void a posted payroll for one person.
- The Void Adjustments allows you to void a change made to a posted payroll.
- The Print Checks allows you to generate checks either as a first run or when reprinting replacements.

Reports/Export



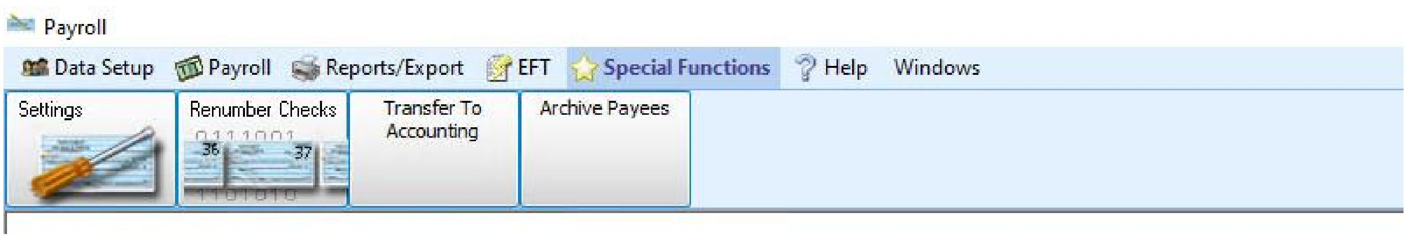
- Employee Reports include
- Pay Reports include
- Check Reports include
- EFT Reports include
- Tax Reports include
- IRS Website links you to the official website of the Internal Revenue Service - www.irs.gov
- SSA Website links you to the official website of the Social Security Administration - www.ssa.gov

EFT



- EFT Setup
- Add EFT
- Pre-Notify
- EFT Copy
- Void EFT
- Print Auth. Form
- EFT Reports

Special Functions



- Settings
- Renumber Checks
- Transfer To Accounting
- Archive Payees

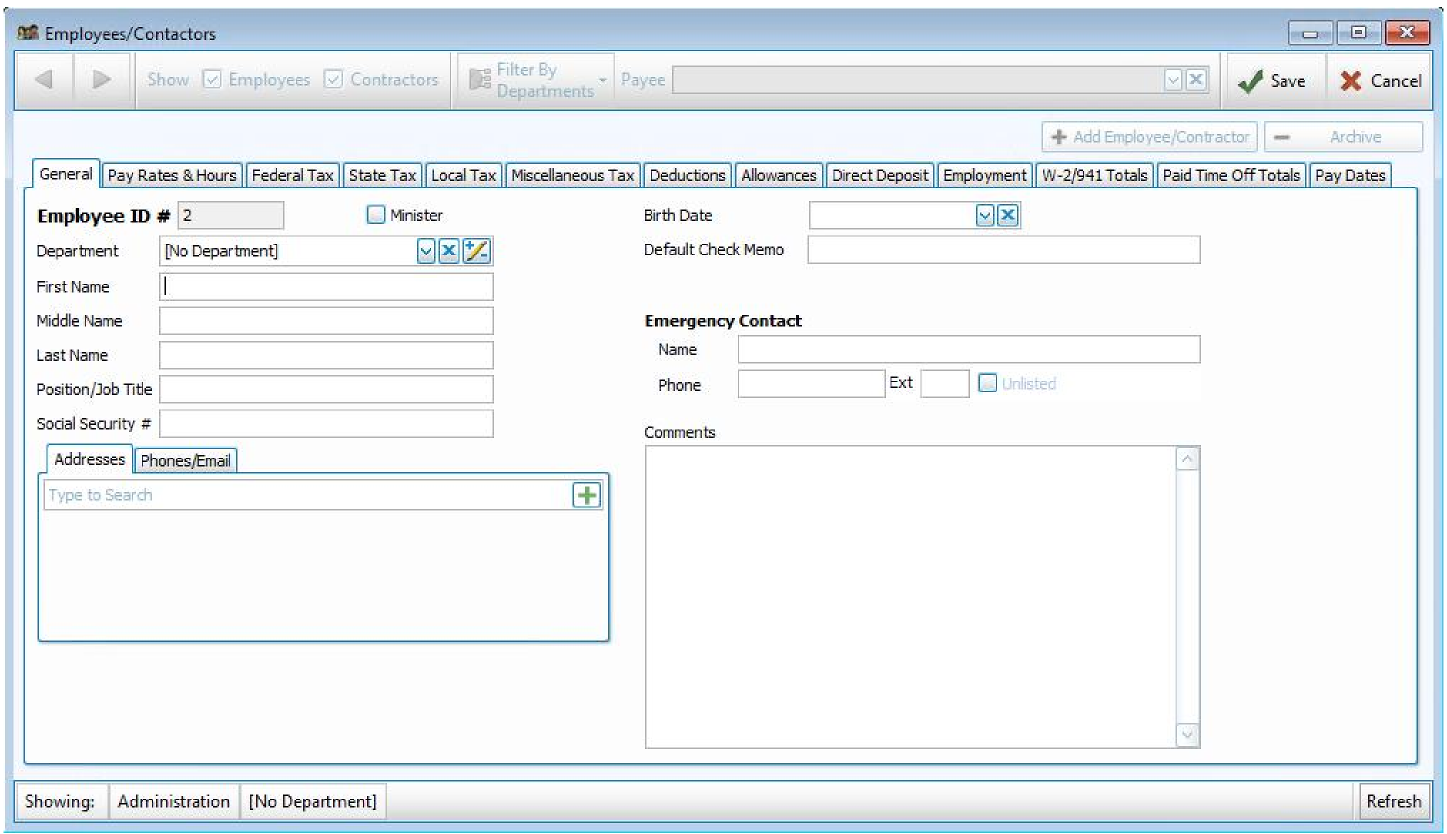
Data Setup

In the printed Help manual, information for data setup is presented in the same order as the dropdown menu. This is not the order to follow if setting up for the first time. IF there are allowances, deductions, or local taxes for an employee, these need to be setup in the respective screens before they can be attached to the employee record.

The Employee File

The Employee File stores all information that pertains to each employee, including but not limited to pay rates, tax deductions, allowances, deductions, address information, vacation and sick time, and W-2 totals for the year. You may add or edit employee information at any time throughout the year. To open the Employee File, click on **Data Setup** and choose **Employee File**.

Once an employee is added, the left side of the screen contains the basic name, address, Social Security number, and phone number information that is entered when the employee is first added. On the right side of the screen is important employee information that is stored in eight tabs. To view a different tab, click on the desired tab name at the bottom right of the screen. In the image below, you can mouse over some of the options to get a little more information on that field, or click to find out more details.



Adding a New Employee

To add a new employee to the Employee File:

- Click on the **Add** button on the Employee File screen.
- If this person is included in a Department, click on the down arrow in the **Department** field and select the appropriate one. See The Departments File *(pg 173)* for more information.
- If this person is a minister click in the box labeled minister to check it or to clear it. **Canada:** If the minister has taken a vow of perpetual poverty, click this box.
- Enter the person's name, permanent address, and phone information into the available fields. An alternate address field is also available for use on paychecks. See General Information - The General (2) Tab *(pg 160)* for more information.
- Enter the person's Social Security number. You WILL need to enter the dashes into this number.
- In the **Federal Filing Status** field, select whether this employee's tax status is **Married**, **Single**, or **Head of Household**. Individuals selecting "Married, but withhold at higher single rate" should be checked as Single.
- Click on **OK** to save this new employee. When the information is saved, the person will be assigned an employee number. This is a system-assigned number and it may not be edited.
- After you have clicked **OK**, you will get a message, "Please remember to go to the Payroll System Administration menu to set up Accounting numbers for the employee(s) just added". See Account Number Setup *(pg 178)* for more information.
- After adding new employees, then enter the pay information, tax withholding information and other appropriate information for each new employee on the Employee File. See the topics in the "Additional Employee Information section, starting with General Information - The General (1) Tab *(pg 159)* for more information.
- When any additional information has been added, click on **Apply** and **OK** to exit the Employee File.

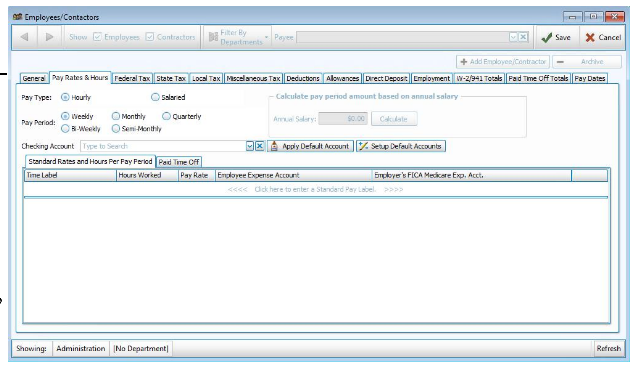
General Information - The General (1) Tab

The General (1) tab scrolls and includes information about the employee's pay that they will receive and sick or vacation hours that they could accumulate.

- **Pay Type** - Mark this person as **Hourly** or **Salaried.** If an employee is checked as **Hourly**, then when a pay is calculated, the program will multiply the hours worked times the pay rate. If an employee is checked as **Salaried**, then when a pay is calculated, the pay will be the salary for the Pay Label 1 and Pay Label 2 fields.

- **Pay Period** - Select how frequently the employee receives pay. This affects tax withholding calculations. "Bi-weekly" is every two weeks, while "Semi-monthly" means twice per month with a total of 26 pays generated throughout a calendar year.

- **Standard Rates and Hours per Pay Period** - Enter the standard number of hours per pay period and the person's pay rate for each pay type that applies. For salaried employees, enter the amount of their gross salary per pay period. For hourly employees, enter the hourly rate. The first two pay types will be calculated hourly or salaried according to their "Pay Type" entry above. The third pay type will always be calculated hourly. To change the titles of the Pay Types, see System Information.



- **Accumulating Hours per Pay Period** – If the Church pays vacation or sick time and this is based on how many pay periods or hours are worked, you may indicate how many units of vacation or sick time the employee accrues with each pay. Each time the person receives pay, their accumulated vacation and sick time will increase by this amount. You may view accumulated hours of vacation or sick time at the bottom of the **Totals** tab on the **Employee File** screen.

Vacation and Sick Time

The Church Windows Payroll program provides automated tracking of accumulated sick and vacation time for each employee. This feature is optional for each employee.

For a detailed example, click here

If your employees do not earn accumulate vacation/sick days but are allowed x-number of days per year, the total amount they have for the year can be placed on their record using Calculate Adjustment. See **Calculate Adjustment** for more information.

To print a report of vacation/sick time earned and used for a selected employee, go to **Reports**, **History Reportt** and select **Employee's Detail Hours Report**.

General Information - The General (2) Tab

The **General (2)** tab is also a scrolling tab. It contains additional information about each employee, such as alternate address, emergency contact information, birth date, dates of hire, termination, review, etc., emergency contact information and banking information for EFT. See **Direct Deposit Setup - System Profile** for more detailed information.

Federal Income Tax Withholding Information

To view or edit the Federal Withholding information screen, click on the **Federal** tab at the bottom right of the Employee File.

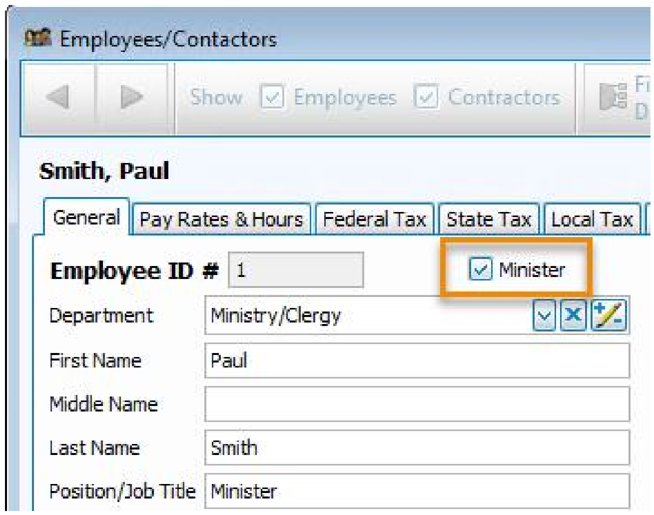
- **Federal Filing Status -** Choose Single or Married, based on the W-4 form.

- **Use Tax Tables** - Leave this box checked unless the employee's W-4 indicates they are exempt or if employee is a minister and wants to specify an amount to withhold.

- **Additional Withholding Amt** - This adds an additional dollar amount or percentage with-held for federal taxes. If the check mark is removed from **Use Tax Tables**, then this field becomes **Specific Amt/Pct.** You may then specify the withholding amount or percent in the fields.

- **Exemptions** - Enter the number of exemptions that this person claimed on his or her W-4 form.

- **Minister's S/E Tax** - If this person is a **Minister** and would like to have the Self-Employment tax with-held, then check this box. When pay is calculated for this person, withholding will be equal to both the employee's share and the employer's share of FICA (15.3%). Also, unless you take the check out of the "Use Tax Tables" box in the federal tab, Federal income tax will also be withheld.



Due to tax law changes advanced EIC payments are no longer available.

- **W-2 Box 13 Retirement Plan** – Check this box if this person has a retirement plan that is fully funded by the organization.

State Income Tax Withholding Information

To view or edit the State Withholding information screen for an employee, click on the **State** tab at the bottom right of the Employee File.

- The Default State selected on the Organization Information screen, is attached to the employee record. This can be changed if you withhold for a different state.

- **Filing Status Code** – If applicable, select the filing status based on the employee's state withholding form.

- **Use Tax Tables, Additional Withholding Amt** or the **Additional Withholding Pct** - These fields apply to the State Withholding tax in the same way these fields work for Federal taxes on the Federal tab.

- **Exemptions** - Enter the number of exemptions the employee claims based on the state withholding form.

- **Additional exemptions** - Some states use a different dollar amount for additional exemptions. If your state does and the employee has any additional exemptions, enter that number into the field.

Local Withholding Information

To view or edit the Local Withholding information for an employee, click on the **Local** tab at the bottom right of the Employee File.

- At the top of the Local tab is a list of all localities or school districts taxes that have been attached to the employee's record. Each employee may have taxes withheld for multiple localities.

- To add a locality to the list, click in the **ID** column, click on the down arrow to see the drop-down list of all local taxes that exist in the Local Tax File. Select the tax to be withheld from this person's pay. To add, edit, or delete cities from this list, see **Local Taxes Files** *(pg 174)*.

- To delete a local tax from an employee's file, highlight that tax by clicking the square at the left of the **ID** column, then click on the **Delete** button.

- To have an additional dollar amount withheld for a local tax, enter the additional amount or percentage in the **Add. W/H Amount** field.

- At the bottom of the screen is a list of the year-to-date taxable wages and tax withheld for each locality or school district. This area may not be edited as the amounts are calculated from pays posted in the Payroll program for the year.

Employee Deductions Information

To view or edit the Deductions information for an employee, click on the **Deductions** tab at the bottom right of the Employee File.

- On this tab there is a list of all deductions attached to the employee's record. Each employee may have money withheld for a different combination of deductions. If this list is blank, then no deductions will be withheld for this person.

- To add a deduction, click in the **ID** column, click on the down arrow to see the drop-down list of all deductions. Select the deduction to be withheld. To add, edit, or delete deductions from this list, see **Entering and Editing Deductions** *(pg 168)* or **Editing Deductions/Allowances** *(pg 167)*.

- Each deduction that you add to an employee's record will default to the **Frequency** information that exists for that deduction. The frequency can be edited on the employee record by clicking on the drop down menu and selecting one of the frequencies listed.

- Enter the amount or percent that should be deducted from this employee's pay for this deduction for the frequency selected.

- If the deduction you add is a miscellaneous tax deduction, then the frequency, amount, and percent will default to those entered for this tax deduction on the Deductions File. This information cannot be edited on the Employee File.

- To delete a deduction from this list, highlight that deduction by clicking the square at the left of the **ID** column, then click on the **Delete** button.

- At the bottom of the screen is a list of the total year-to-date amounts withheld from this person's pay. This area may not be edited as the amounts are calculated from pay posted in the Payroll program for the year.

Employee Allowances/Additional Pay Information

To view or edit the Allowances information for an employee, click on the **Allowances** tab at the bottom right of the Employee File.

- On this tab there is a list of all allowances attached to the employee's record. Each employee may have money added for a different combination of allowances. If this list is blank, then no allowances will be added for this person.

- To add an allowance to the list, click in the **ID** column, click on the down arrow to see the drop-down list of all allowances. Select the allowance to be added. To add, edit, or delete allowances from this list, see **Entering and Editing Deductions** *(pg 168)* or **Editing Deductions/Allowances** *(pg 167)*.

- Each allowance that you add to an employee's record will default to the **Frequency** information that exists for that allowance. The frequency can be edited on the employee record by clicking on the drop down menu and selecting one of the frequencies listed.

- Enter the amount for the allowance for this employee for this allowance for the frequency selected.

- To delete an allowance from this list, highlight that allowance by clicking the square at the left of the **ID** column, then click on the **Delete** button.

- At the bottom of the screen is a list of the total year to date amounts added to this person's pay. This area may not be edited as the amounts are calculated from pay posted in the Payroll program for the year.

Employee W-2/941 Totals

The **Totals** tab summarizes pay and withholdings by tax entity and accumulated sick and vacation time.

- **Year to Date Taxable Amounts** lists year to date gross taxable pay totals, separated by taxing authority. It also lists the amount withheld year to date for each tax.

- Below the Year to Date Taxable amounts, the same information is separated out by quarter.

- **Accumulated Sick Time** and **Accumulated Vacation** fields show the balance of units (days, hours).

- If you believe these totals are not correct, then run and review a History Report showing Federal Taxable Earnings, Withholdings, and a Net Pay Detail for the employee. You may need to calculate an adjustment to fix the totals. See Void Individual Pay or Calculate Adjustment .

Independent Contractor File

Independent contractors paid $600 or more during the year should receive 1099s at the end of the year. See IRS Publication 1779 in the documents folder that resides in the Payroll installation folder. You can get there by minimizing or closing the Payroll program, right-clicking on the Payroll icon used to open the program, and click "Properties" at the bottom. In this screen you will see a button near the bottom labeled "Open File Location". Click that button and it will open the payroll directory where you will see the Documents folder. This contains Publication 1779 as well as other pertinent IRS documents. You can also talk to your tax advisor about classification of individuals as independent contractors if you have qualification questions. Be sure to use caution when determining the status of someone being an employee vs. an independent contractor since incorrect classifications could result in penalties from the IRS.

To add a new independent contractor:

- Click on the **Add** button on the Independent Contractor File screen.

- Enter the name, the dba (doing business as) if applicable, contact information, and Tax ID number (either a Social Security Number or federal tax number).

- **Pay Labels** tab - enter a description in the pay label field(s) and the corresponding rate.

- **Withholding** tab - if the W-9 provided to you by the contractor is filed as subject to backup federal withholding, click on the **backup withholding** box. The percentage set by statutory federal rates will be withheld. You can also specify a dollar amount to be withheld for state withholding.

- Click on **OK**.

You may edit independent contractor information for future payments at any point. Just click on the fields to be changed and enter the new information.

The right side of the independent Contractor File screen has 4 tabs. The first tab shows the **Pay Labels**, which may be edited. The second tab shows the **Withholding** information for each payment. The **Totals** tab shows the total payments processed for the year and withholdings, if applicable. The fourth tab - **Dates Paid** - lists the date and net pay for each payment. The Totals and Dates Paid areas may not be edited.

Moving Through Employee/Independent Contractor Records

Use the **First**, **Previous**, **Next**, and **Last** buttons to move through employee records.

To go directly to a specific record, click on the down arrow that appears at the right of the name field at the top of the screen. A drop-down list will appear that lists all employee records in alphabetical order. Select the employee whose record you would like to view by clicking on the name.

The **Employee File** defaults to including **all** employees. You can limit the list to only active or terminated employees, if you have both types of records.

Deductions File and Allowance File – Common Features

After creating deductions/allowances they can be attached to the employee record.
Only one deduction or allowance needs to be set-up for each description if it has the same tax attributes; Amount or Frequency can be modified for each employee.

- **Description** – provide the name to identify the deduction/allowance.

- **Frequency** - click on the down arrow and choose the default frequency. This can be changed on the employee's individual record. Remember that if you run an extra check for any reason that is not a normal pay date, or skip a pay date, it may effect the frequency and when it is applied. Frequencies available are:

(E) Every pay period

(O) Every other pay period

(A) First pay of the month

(B) Second pay of the month

(C) First pay of the calendar quarter

(D) End of the calendar quarter - defined as the 1st pay after the 15th of the month of the 3rd month of the calendar quarter (e.g. first pay after June 15th for the second calendar quarter)

- **Show separately on W-2** - If the deduction/allowances needs to be reported in box 10, 12 or 14 of the W-2, choose the appropriate box. If box 12 is selected assign the appropriate letter code. For more information on W-2s, see "Instructions for W-2 W-3" included under Tax Publications on the Payroll CD. If you are unsure whether a certain allowance or deduction needs to be shown separately, you will need to contact a tax consultant to ensure compliance.

- **Include in W-2 Wages**- If the deduction pretax or an allowance is not taxable remove the check mark from that tax in the section labeled "Include in W-2 Wages". If an employee is marked as a minister, no Social Security or Medicare wages or withholdings will be shown on the W-2 regardless of how these boxes are marked. If you are unsure of the taxability of ANY deduction or allowance, be sure to contact a tax consultant immediately since incorrect taxation can cause serious issues with the IRS in the future.

Editing Deductions/Allowances

You may edit deduction information at any time by clicking on the information to be edited and making your changes.

To delete an entire deduction/allowance, click the square to the left of the name and click on the **Delete** button. The system will not allow you to delete an item if there have been pays posted in the current year that include money for this deduction/allowance.

Note: If you delete a deduction/allowance that has not been used in the current year but was used in prior years, you will lose the prior year history of that deduction since the identification label will no longer exist.

Viewing Monthly Totals

The **Monthly Totals** section at the bottom right of the screen lists the totals deducted or allowances paid for each month for the item that is highlighted.

List Employees

Click the **List Employees** button to get a report of the deductions/allowances for the item in the list that is highlighted.

Entering and Editing Deductions

Voluntary Deductions

If your organization deducts money from employees' pay for items such as pensions or insurance premiums, these deductions must first be entered in the Deductions File.

Miscellaneous State Tax Deductions

In addition to state income tax, some states (such as California, New Jersey, Oregon, and Pennsylvania) collect other taxes, such as state disability or state unemployment insurance premiums from employees' pay. Some of these taxes have capped annual collection limits, while others are based on the number of hours worked.

To open the Deductions File, from the main menu:

- Click on **Data Setup** and select **Deductions File**.

Adding a New Voluntary Deduction

- Click on the **Add** button.
- Key in the **Description.**
- Select the Default **Frequency**.

- Leave the Miscellaneous State Tax box blank.
- Determine if you need to **Show Separately on W-2**.
- The default is to **Include in W-2 Wages**. If the deduction is not taxable, clear the boxes for taxable by tax type.
- Click on **OK**.

Adding a New Miscellaneous Tax Deduction

- In the **Frequency** field, leave the default of (E) Every pay period.
- Click to put a check mark in the **Miscellaneous State Tax** box.
- If you want to report on the W-2 select box 14.
- Enter the rate of the tax. If the tax is based on hours click on the box **Based on Hours Worked**. The rate will be converted to cents per hour.
- If the tax has a maximum limit you can enter the amount either as the maximum tax to withhold per year or the maximum earnings subject to the tax. Click on either **Income Subject to Tax** or **Withholding** corresponding with the limit entered.
- Click on **OK**.

Example: Your state requires that 1% of the first $50,000 of employee wages be withheld for the state disability fund. Put a check mark in the Miscellaneous State Tax box. In the rate box, you would enter 1.00. Under the Enter annual maximum amount of:, you would click the button, “Income subject to tax” and enter $50,000.

After creating deductions/allowances they can be attached to the employee record.

Only one deduction or allowance needs to be set-up for each description if it has the same tax attributes; Amount or Frequency can be modified for each employee.

- **Description** – provide the name to identify the deduction/allowance.

- **Frequency** - click on the down arrow and choose the default frequency. This can be changed on the employee's individual record. Remember that if you run an extra check for any reason that is not a normal pay date, or skip a pay date, it may effect the frequency and when it is applied. Frequencies available are:

(E) Every pay period

(O) Every other pay period

(A) First pay of the month

(B) Second pay of the month

(C) First pay of the calendar quarter

(D) End of the calendar quarter - defined as the 1st pay after the 15th of the month of the 3rd month of the calendar quarter (e.g. first pay after June 15th for the second calendar quarter)

- **Show separately on W-2** - If the deduction/allowance needs to be reported in box 10, 12 or 14 of the W-2, choose the appropriate box. If box 12 is selected assign the appropriate letter code. For more information on W-2s, see "Instructions for W-2 W-3" included under Tax Publications on the Payroll CD. If you are unsure whether a certain deduction/allowance needs to be shown separately, you will need to contact a tax consultant to ensure compliance.

- **Include in W-2 Wages**- If the allowance is not taxable remove the check mark from that tax in the section labeled “Include in W-2 Wages”. If an employee is marked as a minister, no Social Security or Medicare wages or withholdings will be shown on the W-2 regardless of how these boxes are marked. If you are unsure of the tax-ability of ANY deduction or allowance, be sure to contact a tax consultant immediately since incorrect taxation can cause serious issues with the IRS in the future.

Editing Deductions

You may edit deductions information at any time by clicking on the information to be edited and making your changes.

To delete an entire deduction, click the square to the left of the name and click on the **Delete** button. The system will not allow you to delete an item if there have been pays posted in the current year that include money for this deduction.

Note:

If you delete a deduction that has not been used in the current year but was used in prior years, you will lose the prior year history of that deduction since the identification label will no longer exist.

Entering and Editing Allowances/Additional Pay

If a payment is not taxable or more than three expense accounts are needed to allocate pay, then enter these into the Allowances File. Examples of allowances are a housing allowance or a car allowance.

- Click on the Data Setupbutton and select Allowances File.

Adding a New Allowance/Additional Pay

- Click on the **Add** button.
- Key in the **Description**.
- Select the default **Frequency**.
- Leave the Miscellaneous State Tax box blank.
- Determine if you need to **Show Separately on W-2**.
- The default is to **Include in W-2 Wages**. If the allowance is not taxable, clear the boxes for taxable by tax type.
- Click on **OK**.

Common Features

After creating deductions/allowances they can be attached to the employee record.

Only one deduction or allowance needs to be set-up for each description if it has the same tax attributes; Amount or Frequency can be modified for each employee.

- **Description** – provide the name to identify the deduction/allowance.

- **Frequency** - click on the down arrow and choose the default frequency. This can be changed on the employee's individual record. Remember that if you run an extra check for any reason that is not a normal pay date, or skip a pay date, it may effect the frequency and when it is applied. Frequencies available are:

(E) Every pay period

(O) Every other pay period

(A) First pay of the month

(B) Second pay of the month

(C) First pay of the calendar quarter

(D) End of the calendar quarter - defined as the 1st pay after the 15th of the month of the 3rd month of the calendar quarter (e.g. first pay after June 15th for the second calendar quarter)

- **Show separately on W-2** - If the deduction/allowance needs to be reported in box 10, 12 or 14 of the W-2, choose the appropriate box. If box 12 is selected assign the appropriate letter code. For more information on W-2s, see "Instructions for W-2 W-3" included under Tax Publications on the Payroll CD. If you are unsure whether a certain deduction/allowance needs to be shown separately, you will need to contact a tax consultant to ensure compliance.

- **Include in W-2 Wages**- If the allowance is not taxable remove the check mark from that tax in the section labeled "Include in W-2 Wages". If an employee is marked as a minister, no Social Security or Medicare wages or withholdings will be shown on the W-2 regardless of how these boxes are marked. If you are unsure of the tax-ability of ANY deduction or allowance, be sure to contact a tax consultant immediately since incorrect taxation can cause serious issues with the IRS in the future.

Editing Allowances

You may edit allowance information at any time by clicking on the information to be edited and making your changes.

To delete an entire allowance, click the square to the left of the name and click on the **Delete** button. The system will not allow you to delete an item if there have been pays posted in the current year that include money for this allowance.

Note: If you delete an allowance that has not been used in the current year but was used in prior years, you will lose the prior year history of that allowance since the identification label will no longer exist.

The Departments File

By creating and assigning employees to departments you may run separate payrolls or reports by specific groups. Each employee may be included in only one department. To open the Departments File, click on **Data Setup**, and select **Departments File**.

To add a new department:

- Click on the **Add** button.
- Key in a department number (a one-, two-, or three-digit number up to 999) and Description.
- Click on **OK**.

You may edit the name (description) of a department at any time.

To delete a department:

- Click on the department name and click the **Delete** button.
- Click on **OK**.

Deleting/Terminating an Employee

If an employee ends employment, then you may want to change the person's **Pay Type** to **Terminated** on the **General1** tab of the **Employee File**. When an employee is terminated, then no pay will be calculated for this person. A W-2 will still be generated at the end of the year if there is pay during the year.

Once an employee has had no pay in neither the current year, or in the previous year, you may delete that person's record completely. We recommend retaining the record for five years after terminating.

- Click **System Administration** and **Delete Employee/Contractor**.
- Select either **Employee**, or **Independent Contractor**.

- Type (or confirm) the current date.
- Click → **Next**.
- The system will generate a list of those employees or contractors who have no pay calculated in the current or previous year. Select the person you'd like to delete. Then, click **Finish**. **When an employee is deleted, all information for that employee for all years is deleted.**

Local Taxes Files

Any local or school district taxes need to be set up with the Local Tax Wizard.

The local tax record must exist in the system before you can attach them to employees' records.

The Local Tax Wizard has been designed to accommodate a wide variety of taxation methods. Most customers that are in an area that imposes a local tax will only need the screens for Local Flat Rate Tax and/or a Local School District Tax. There are more advanced features for setup if required for your local tax structure.

Add a New Local Tax

- Click **Data Setup** and choose **Local Tax Wizard**.
- Select **Create** a new local tax file and click **Next**.

Local Tax Name, ID, Year, and School District Tax or Not

- The system defaults to the next available **Local Tax ID**.
- In the **Local Tax Description** field, type the name of this local tax.

> ***Note:***
>
> *Some school districts prefer the district number as the identifying name.*

- "Is this a school district tax?" - select **Yes** or **No**.
- Click **Next**.

Local Tax - Flat Rate

- If you answered **No**, and the local tax is the same rate on all local wages, then select **Yes**.
- Click **Next**.
  - Enter the tax rate. (For example, if the tax rate is 1½ %, then type 1.5 into the **Rate** field.)
  - Click **Finish** to save this new local tax.

School District Tax

- If you answered **Yes** to the school district tax question, then type the tax percentage into the **Rate** field.
- "Is the tax based on local or state taxable income?" - select **Local** or **State**. If the tax is based on state taxable income, state exemptions claimed will be used in the computation.
- Click **Finish**.

Local Tax - Graduated Rate (With or Without Exemptions and Standard Deductions)

- When you answer **No** to the question about school district tax, and **No** to the question about whether this is a flat rate tax, then when you click **Next** there are other selections to make.
- If this local tax allows a Standard Deduction, then click on the **Standard Deduction** box.
- If this local tax allows Personal Exemptions, then click on the **Personal Exemptions** box.
- If you checked the **Personal Exemptions** box, then answer the question "Are personal exemptions the same amount for each dependent?" - select **Yes** or **No**.
- Click **Next**. Your choices on the next screen will depend on the selections you made about standard deduction and personal exemptions:

No Standard Deduction and No Personal Exemptions:

- The screen will contain a grid in which to enter your tax tables. Use the right arrow key to move through the fields on this grid. Once you have entered the tax table click **Finish**.

With a Standard Deduction and/or Personal Exemptions:

- If you checked the box for Standard Deduction enter the amount of the Standard Deduction into the appropriate field.
- If you checked the box for personal exemptions enter the amount of the exemption into the appropriate field.
- If the exemption amount differs according to the number of dependents, fill in the required fields for the exemption numbers and the associated amounts.
- Click **Next** to continue.
- Follow the previous instructions for Flat Rate OR completing the grid explained above.
- Click **Finish**.

Editing Existing Local Taxes

- To edit information click **Data Setup** and select **Local Tax Wizard**.
- Select **Edit an existing local tax file**. When you make this selection, a list appears toward the bottom of the screen that shows all local taxes in the system.
- Click on the tax to edit and click **Next**.
- From that point on, you have the same choices as when you add a new local tax.

Deleting a Local Tax

You may not delete a local tax from the Local Tax File if there have been pays calculated for employees that include withholdings for this tax.

- Click **Data Setup** and select **Local Tax Wizard**.
- Select **Delete an existing local tax file**. A list appears that shows all local taxes in the system.
- Click on the tax and click **Delete**.

Verifying your FUTA and SUTA Information

- Click on the **Data Setup** menu item and select **Tax Rates and Wage Bases**.
- **Social Security** and **Medicare** lines contain the correct amounts and may not be edited.
- Churches are exempt from FUTA tax. If your organization is not exempt, modify these fields if necessary.
- If subject to State Unemployment taxes, enter a percentage and wage base. In the box called **Gross SUTA Wages Based On**, select **Federal Taxable Wages, State Taxable Wages**, or **Local Taxable Wages**.
- If you made changes on this screen, click **OK**.

Link Payroll to Church Windows Accounting

To transfer the payroll transactions to Accounting, you need to link the accounts in your accounting records to the employee records using **Account Number Setup**. This is the function used even if you do not use a numbering system in Accounting. You must have your Chart of Accounts for the current year set up in the Accounting module before you can implement this step.

- Click on **Sys. Admin.** and choose **Accounting Account Number Setup**. If this option does not exist, return to the section on setting up the System Profile screen.

Default Account Numbers

Typically the same account is used for writing payroll and the same liability accounts are used for withholding taxes.

- Click on the **Set Defaults** button.
- Click on the drop down arrow and choose the accounts from the list and click **OK**.
- Click on **Apply Defaults** on each employee's record.

Account Number Setup

- Click on the drop down arrows to select accounts for each item of pay for each employee.
- Click on the tabs at the bottom of the screen and select the accounts for **Local Tax**, **Deductions**, and **Allowances**.
- To print a report listing the Accounting account numbers set up for one or more employees or contractors, go to **Reports**, **Accounting Accounts Setup**. If an account number has not been assigned, an asterisk (*) will appear in the account number column on this report.

Setting up New Payroll Mid-Year

Once setup is complete, use the **Calculate Adjustment** to enter payroll prior to using the program to generate actual pay. See Calculate Adjustment for more information. Entries can be made for each pay, quarterly, or year-to-date totals for each employee. This will enable you to produce W-2s for your employees at the end of the year.

Chapter 7 - Administration

Administration

Click **Administration** to access the following tasks:

Backup

We recommend Making a Backup *(pg 180)* anytime you make changes which you would not want to lose.

Restore

In the event of data loss or corruption, Restoring a Backup *(pg 182)* will allow you to revert to old data from a previously made backup.

Sys Info

Short for System Information *(pg 184)*, this screen stores your organization's name and address as well as the licensing information for each Module.

Security

This option opens the Security *(pg 188)* function of Church Windows, where you may design a system of individual Users *(pg 189)* with their own passwords. This will record who makes what changes and will allow you to restrict the access to specific features and Module for each individual username.

Support

The **Support Functions** *(pg 199)* are used in troubleshooting more complicated issues, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials. if you are having difficulties.

Making a Backup

Church Windows includes a backup program that will back up your Church Windowsdata files for you. This program compresses files for storage in another location such as flash drives or cloud drives. Even if you have a different backup program that you use regularly, you need to back up Church Windows using our built in backup program. **Any backup program is not effective if it is not used properly.**

Important!

- Take the most current backup OFF SITE! A backup will do you no good sitting in the drive of a computer that has been stolen or destroyed.
- If in the event you are **Restoring a Backup** *(pg 182)* to your computer, keep in mind that it will **delete the current data** and replace it with the data **as it existed at that exact point when the backup was made**. Any changes made to the data after that backup was made will be lost.

To use the internal backup procedure:

- From The Initial Portal of Church Windows choose **Administration** *(pg 178)*
- Choose **Backup**

- The Backup screen will appear:

- Choose either:
  - **All Data (Membership *(pg 29)*, Scheduler *(pg 64)*, Donations *(pg 96)*, Accounting *(pg 129)*)** to backup all of the Modules
    or
  - Pictures to only backup your **Membership** photos (which are not included in the **All Data** backup). If you have pictures in you **Membership** records, be sure to select both. If you do not have pictures uploaded, this option will not be available as in the image above.
- Depending on your selection, the compressed backup file will be named:
  - **CWDataBackup MM-DD-YYYY HH.MM.SS AM.zip** (the date and precise time of the backup) if you selected to back up **All Data**
  - Or **CWDataPicBackup MM-DD-YYYY HH.MM.SS AM.zip** if you selected **Pictures**
- **Backup To...**
  - Select the location where you will be using to store your backed up information, such as a USB flash drive or a networked drive.
  - The system defaults to the drive most recently used to create a backup.
  - To change this backup destination, click the **Browse** button and select the drive or directory you'd like to back up your data to.
  - Each backup file is given a unique name with the time and date stamp included in the name. This changes each time a backup is made. You may want to periodically open the location the backup files are stored and delete the older backups (referring to the time/date stamp in the name) to free up space.

- To create the backup, click **Begin Backup**. The program will compress your Church Windows data and store it onto the selected drive.
- After the backup has completed, make sure you keep track of where you have saved the data.

Restoring a Backup

If this is a new installation of Church Windows, it will ask if you are restoring a backup, and you can choose to Restore Existing Data.

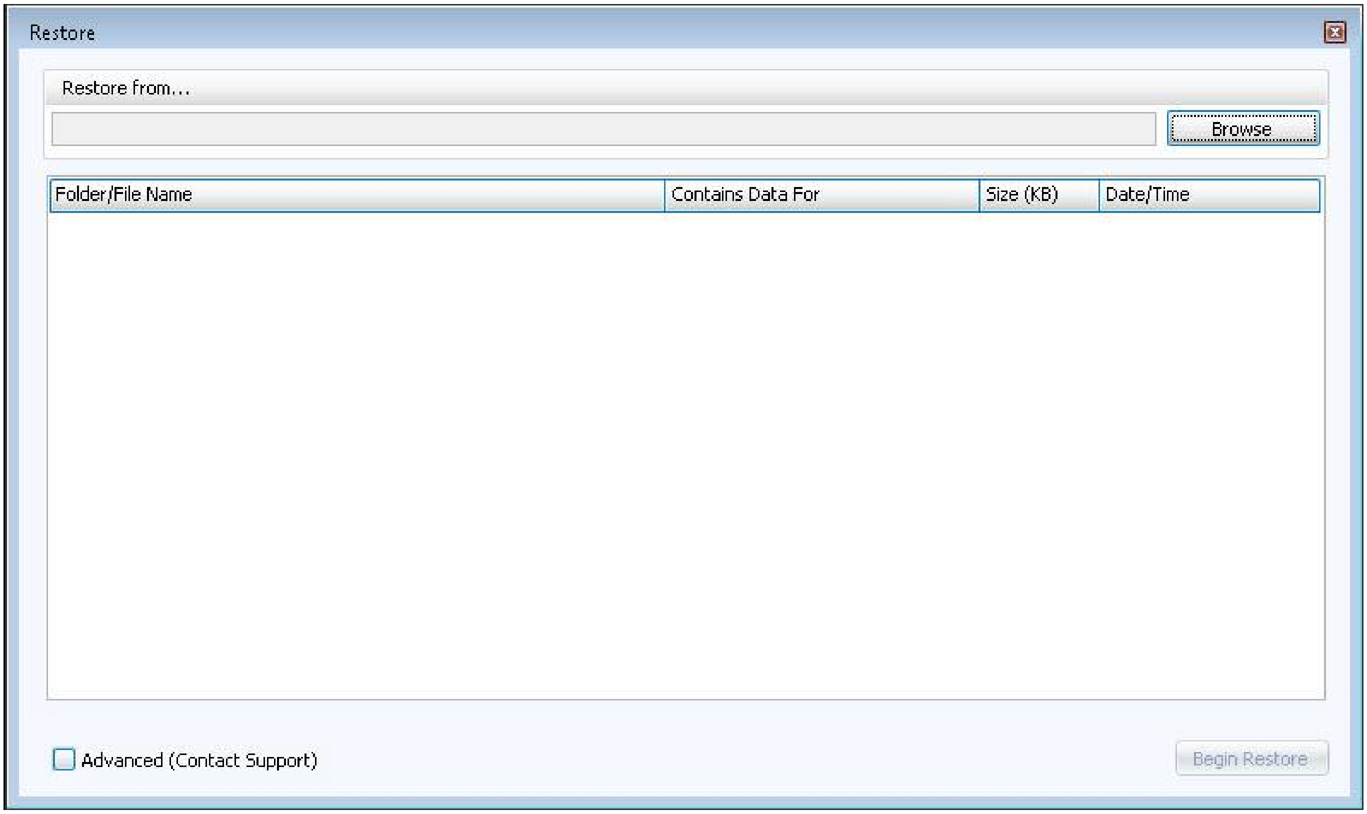
Important!

- When you restore a backup, it will **delete the current data** and replace it with the data **as it existed at that exact point when the backup was made**.
- Any changes made to the data after that backup was made will be permanently lost.

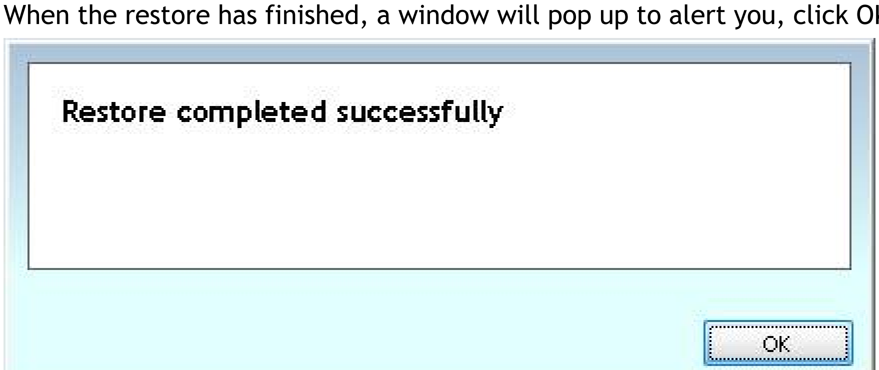
To restore a backup that was created by **Making a Backup** *(pg 180)*:

- From The Initial Portal of Church Windows choose **Administration** *(pg 178)*
- Choose **Restore Data**
- If the **Restore Data** button is grayed out with a lock symbol on it, then your Church Windows password does not allow you access to this feature.
  - Click **Administration** and choose **Security** *(pg 188)* (or have your system administrator do this) to permit your username access to the **Restore** function.
  - This feature can be disabled for specific **Users** *(pg 189)* since an accidental restore could possibly result in data loss.

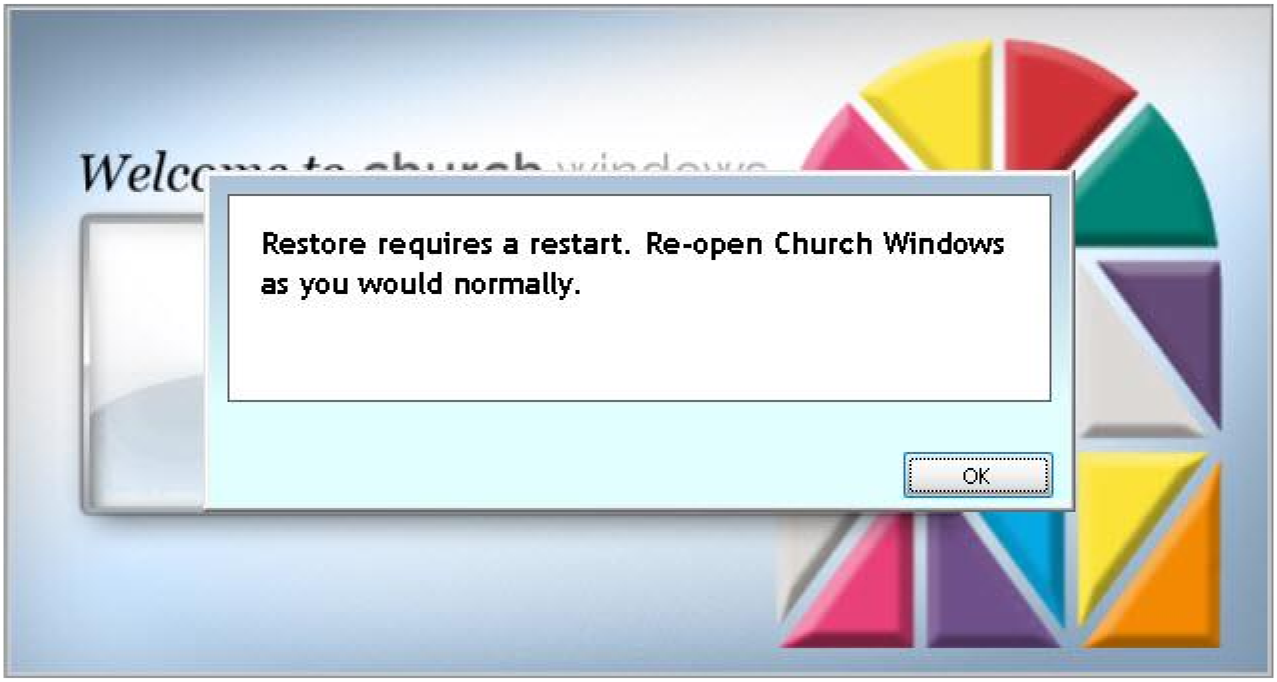
- The Restore screen will open:



- When you select **Restore Data**, the system checks for a backup file to restore from. The system will default to restoring from the drive that was used for the most recent backup created.
- Once the **Restore Data** screen is open, you may then click **Browse** and select the location of the backup file that you'd like to restore.
- Click **Begin Restore**. The system will replace your current Church Windows data with the data file(s) you selected.
- When the restore has finished, a window will pop up to alert you, click OK:



- Another window will open telling you to restart Church Windows:

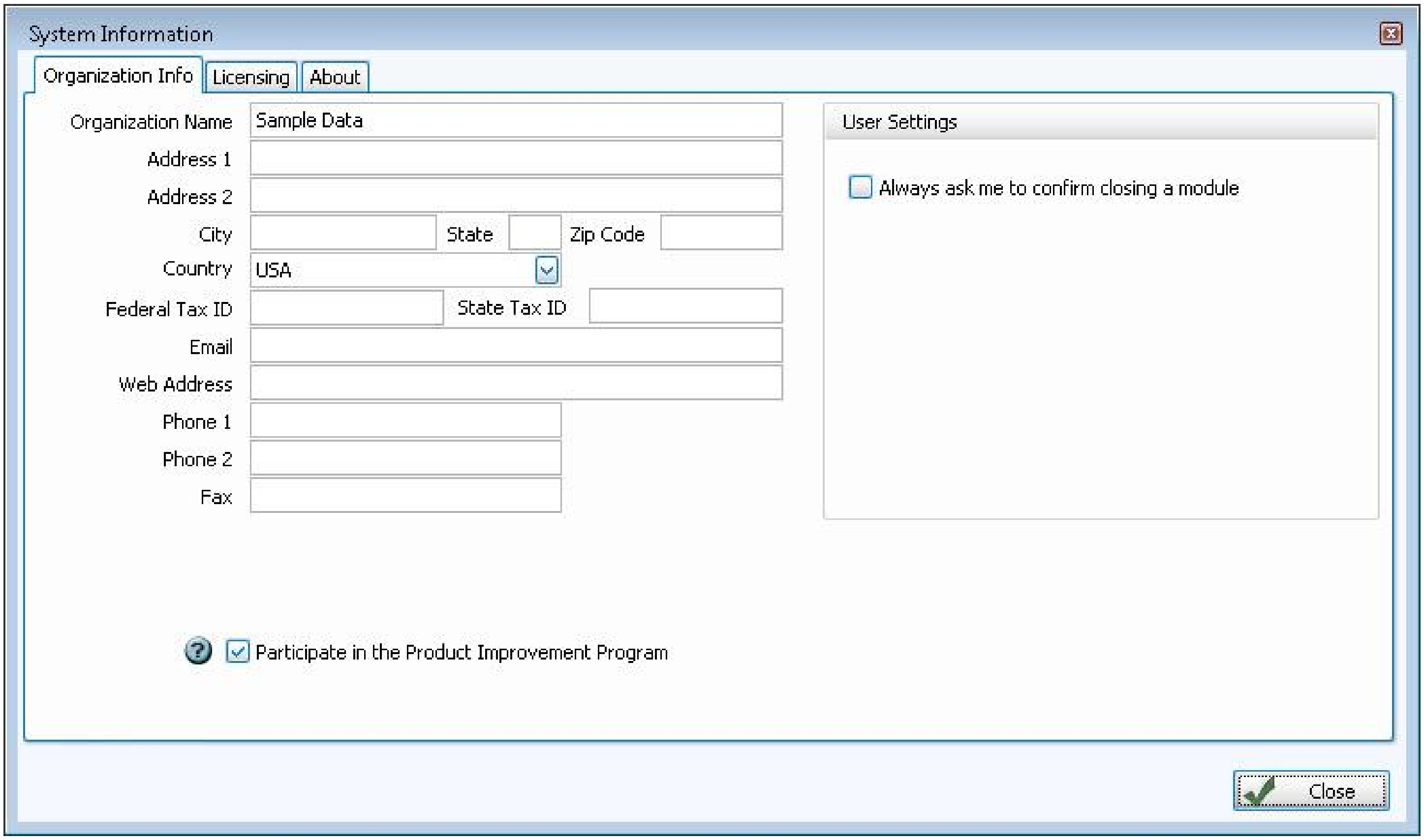


System Information

In Church Windows, the **System Information** screen contains your organization's name and address, and also gives you the opportunity to customize your copy of Church Windows. Many of the changes you make on this screen will not take effect until you exit Church Windows and re-open the program.

To access the System Information screen:

- From The Initial Portal of Church Windows choose **Administration** *(pg 178)*.
- Choose **Sys Info** from the popup buttons that appear above it.
- The **System Information** screen will appear:



Organization Info

Organization Name and Address

The Church name and address that appear here on the **System Information** screen were entered as the name and address of your Church when Church Windows was first installed.

To change your organization's name, address, and/or phone number, click the appropriate fields and make your changes. This information appears at the top of Church Windows **Reports / Directory / Exports** *(pg 1)* and as the return address on **Donation Statements** *(pg 1)* and **Labels** *(pg 1)*. If you choose to **Use Organization Info (City, Stae, ZIp Code, and/or Country)** *(pg 1)* when you enter a new family, the **City**, **State** and **Zip code** entered here will be the default address information automatically added to a new record which you can either leave or edit as needed.

Country (USA or Canada)

If you are a US customer, then leave the **Country** field at **USA**.

If you are a Canadian customer, then on the **System Information** screen, click the  dropdown button in the

Country field and select **Canada**. Once you make this change, then the City, State field will change to **City**, **Province**, the Zip Code field will become **Postal Code**, and the Tax ID number will become **Registration Number**.

This change also affects **Donation Statements** *(pg 1)*, which are renamed to "**Donation Receipts** *(pg 1)*" and comply with Revenue Canada requirements. (See **Canada Settings** *(pg 200)* for detailed information about using Church Windows in Canada.)

Tax ID Number (for non-profit organizations)

In the **Tax ID Number** field on the **System Information** screen, enter your organization's tax identification number, if you have one. This number will print on **Donation Statements** *(pg 1)* printed from the **Donations** Module and on **Form 1099 MISC** *(pg 1)*'s printed from the **Accounting** Module.

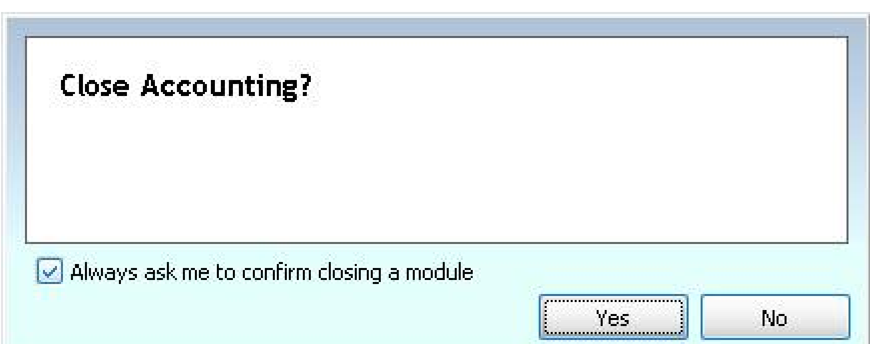
If the **Country** field is set to Canada on the **System Information** screen, this field will be called **Registration Number**.

Product Improvement Program

There is a checkmark at the bottom of this screen for this option. This program helps Computer Helper Publishing improve this product for you. The information that is gathered cannot be used to identify you or your organization or contact you, nor is any of the data entered by your organization collected. Without interrupting you, this program periodically uploads information about your PC hardware and general usage data (to let us know which portions of the product are being used the most).

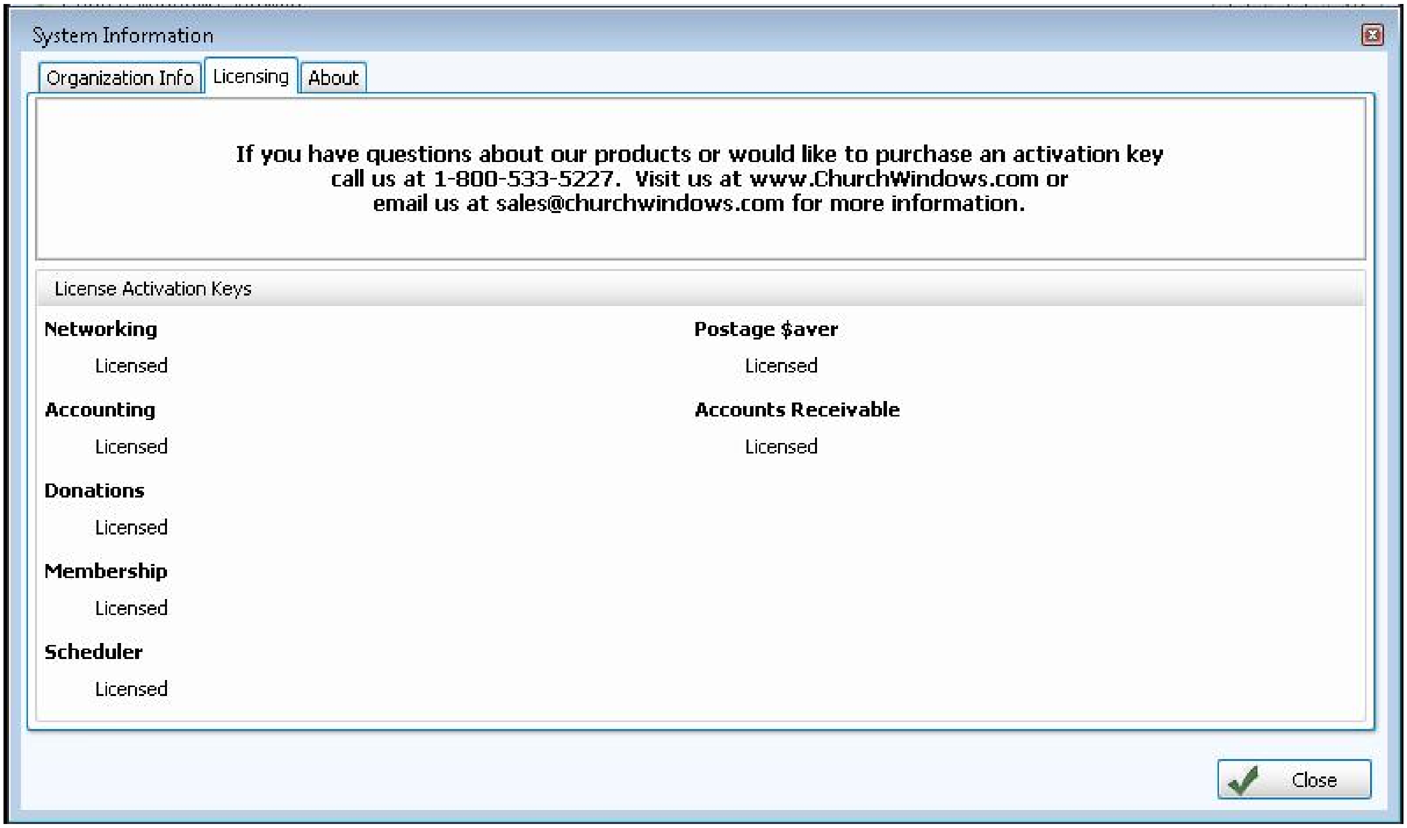
Users *(pg 1)* Settings

There is a checkmark on the right side of this screen for the option to "**Always ask me to confirm closing a Module**". This determines if a Module will close right away when you click the red **X** in the upper right to close that Module or if it will first show a confirmation popup before closing the Module, like this:



Licensing

This tab will give you information regarding which products you have licensed:



Accounts Receivable *(pg 1)* and **Postage $aver** *(pg 202)* are optional add-ons to the main set of Church Windows Modules. If you would like to start using any of the unlicensed Modules, contact support for more information at 800.533.5227.

About

This tab shows information about Church Windows and how to contact us:

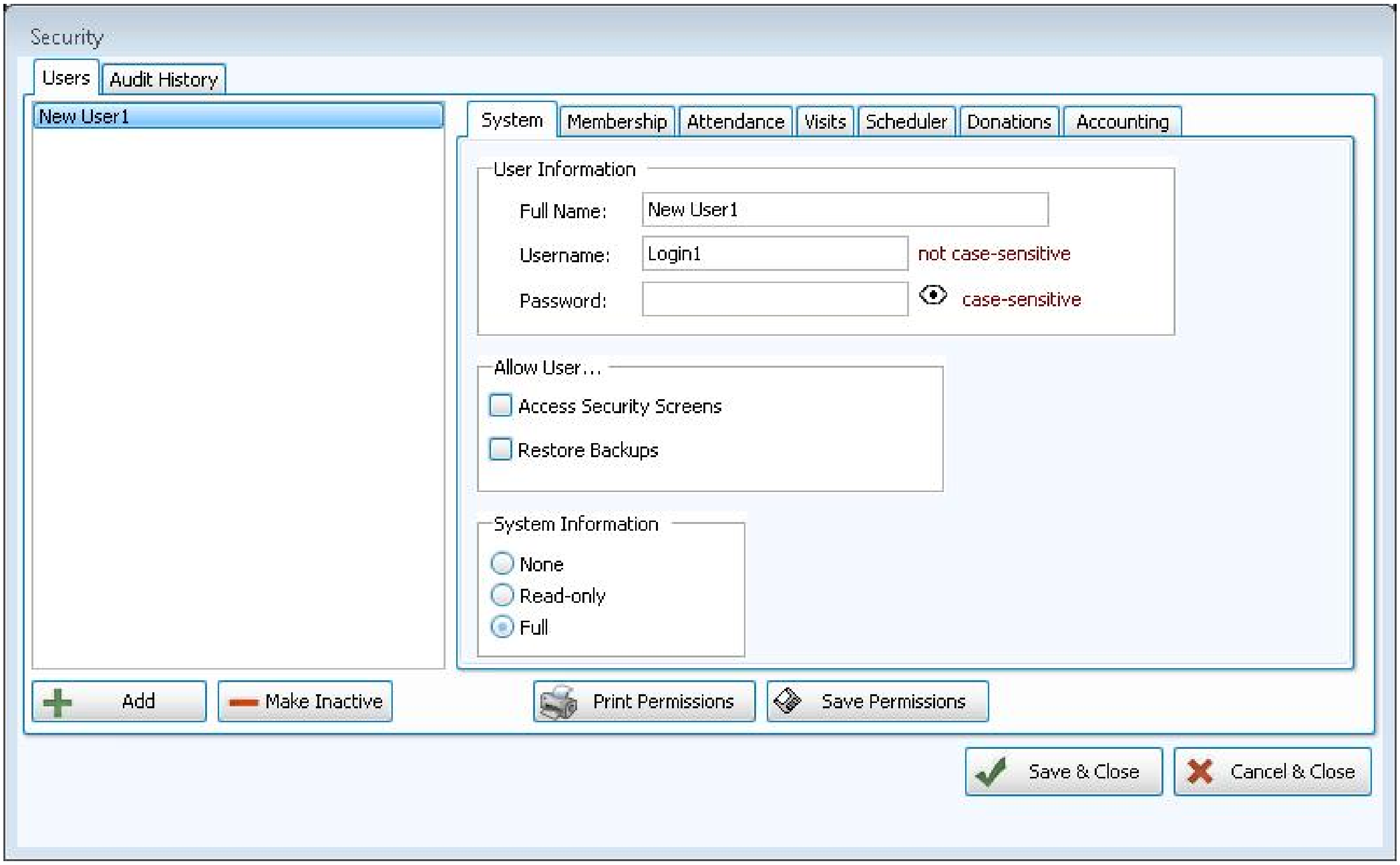
Security

Different people that use the Church Windows software are kept track of as Users on the **Security screen**. The **Security screen** is a panel of options where you can designate only certain Users to have access to the different features of each Module of Church Windows.

Important!

When logging into Church Windows, you will need to know the **Username**, not the Full Name. The Full Name is only for reference in the **security screen** and is not used to log in, so make sure any new user that is set up knows their **Username** since it will need to be typed in. There is not a list of usernames to choose from.

From The Initial Portal of Church Windows choose Administration *(pg 178)*, then click **Security**:



Users

The Users list is set up to accommodate a set of permissions per User added to the list. Therefore, designating the Users of this software means that you must also designate the features that you want each User to use. Once there has been at least one Active user added to the list of Users, the software will open to a screen prompting you to enter a Username and enter a Password before Opening Church Windows *(pg 3)* opens.

> **Note:**
>
> *Only one person can be logged in as a certain user at any given time.*

Add a New User

Click the **+ Add** button to create a new user.

User Information

- The information for **New User 1** will appear in the list and in the **Full Name** field on the **System** tab, on the right side of the screen.
- Replace **New User 1** with the **Full Name** of the person you are letting have access to the software.
- Enter a desired **Username** (first names are a good choice).
- Enter a desired **Password** (the users can change this themselves later on, if needed).
  - To help you verify that you have correctly entered the password you intended, click the **eye** button next to the field. The characters entered in the field will turn from asterisks to the text you actually typed.
  - Every user MUST have a password. Passwords are case sensitive, but Usernames are not.

> **Note:**
>
> *When setting up Users, make sure that you allow access to the **Security screens** for **at least** one user. Doing so will give one user the ability to make changes to User information and make any changes to software feature access privileges as needed.*

Allow user...

- **Access Security Screens**
  Click to place a checkmark in the box if you want to allow the User to open this **Security screen** and make changes to the Security and Passwords information on this screen.
- **Restore Backups**
  Place a checkmark in the box if you want to allow the User access to the **Restore Data** feature found under the **Administration** *(pg 178)* menu. We recommend exercising caution with this permission and limiting this access to only one or two users as **Restoring a Backup** *(pg 182)* will completely erase any data entered into the system after **Making a Backup** *(pg 180)*.

System Information

This is the screen where you can make changes to the **Organization Info** *(pg 185)* (Church name and location) and the software license activation. To give the User access to the **System Information** *(pg 184)* feature found under the **Administration** *(pg 178)* menu, click the option to give the User one of the following levels of access:

- **None**
  The User will be able to click the Administration menu to view the menu options, but will not be able to click the System Information screen. The option will be grayed out.
- **Read-only**
  The User will be able to click the System Information option under Administration and view the screen settings, but will not be able to change anything that has been entered in any of the fields.
- **Full**
  The User will be able to view and/or change settings on the System Information screen without restriction.

As long as you allow at least one User the access to the **Security screens**, you can go back to make changes to any other settings you make on the **Security screen**. To maintain an accurate Audit History, it is not possible to delete old Users, instead you can make them Inactive if no longer needed.

Module Permissions tabs

After adding a new User, the tabs for each specific Module contain lists of features in that Module where you can give the User a specific level of access to each listed feature. You can prohibit a User from accessing entire Modules by unchecking the box at the top of the tab: **Allow User Access to** Membership *(pg 29)* **/** Scheduler *(pg 64)* **/** Donations *(pg 96)* **/** Accounting *(pg 129)* **Module**. At the bottom of each tab are the more global, broad settings for that Module.

Click the **expand** button to the left of each row to view details (when expanded it will become a **collapse** button).

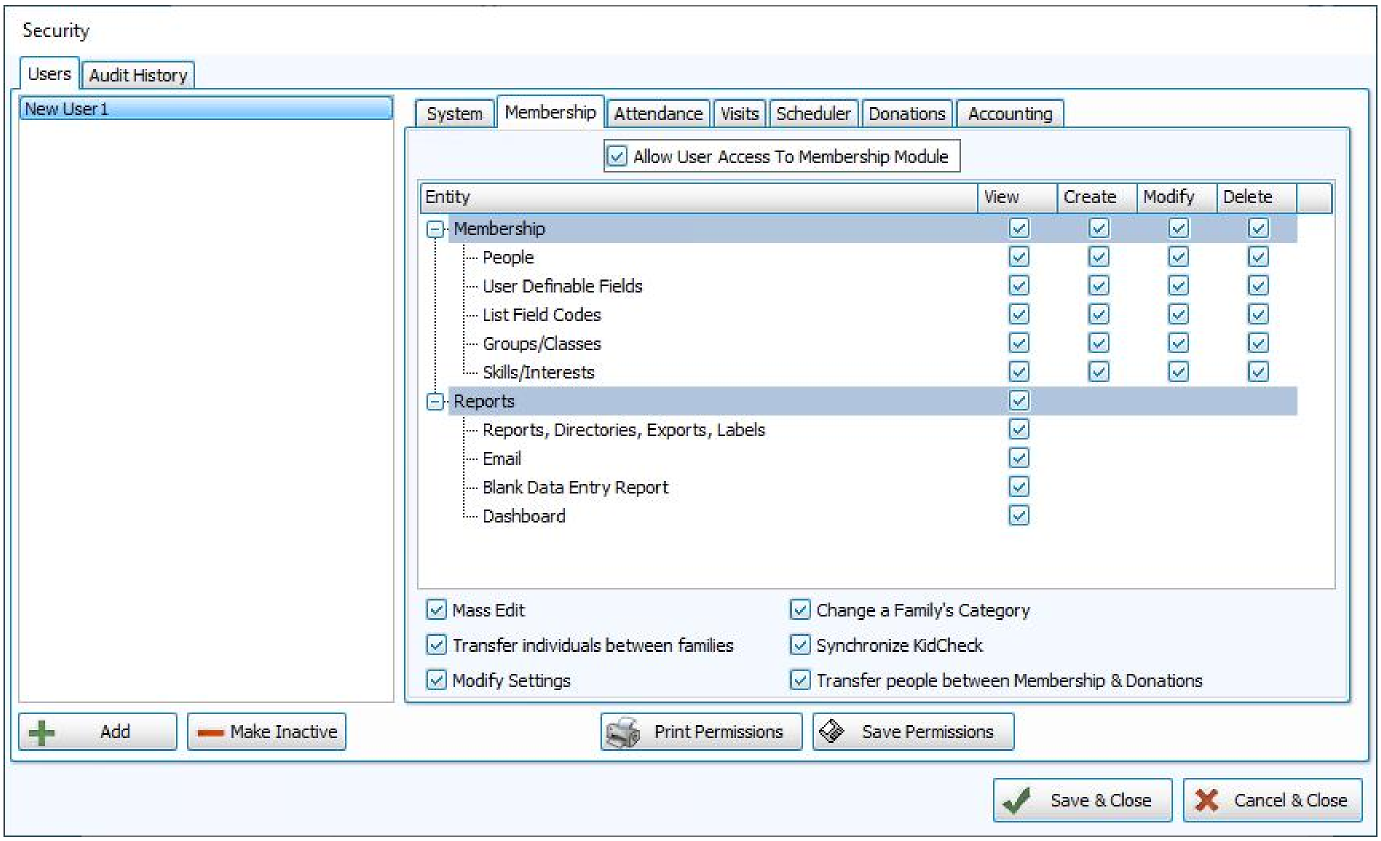
The specific features are separated into categories on each tab. Next to each desired feature, click the box to place or remove a checkmark under each of the following applicable columns:

- **View**
  When checked, the User will be allowed to open and view the screen items.
- **Create**
  When checked, the User will be allowed to add new information.
- **Modify**
  When checked, the User will be allowed to make changes to information already entered.
- **Delete**
  When checked, the User will be allowed to remove information.

Continue through all settings on each of the module tabs until you have completed setting up your list of Users. You can click the button to **Save Permissions** after you make adjustments to this screen. Click **Print Permissions** to print them out. Then click **Save & Close** to retain your changes and exit the **Security screen**.

Membership

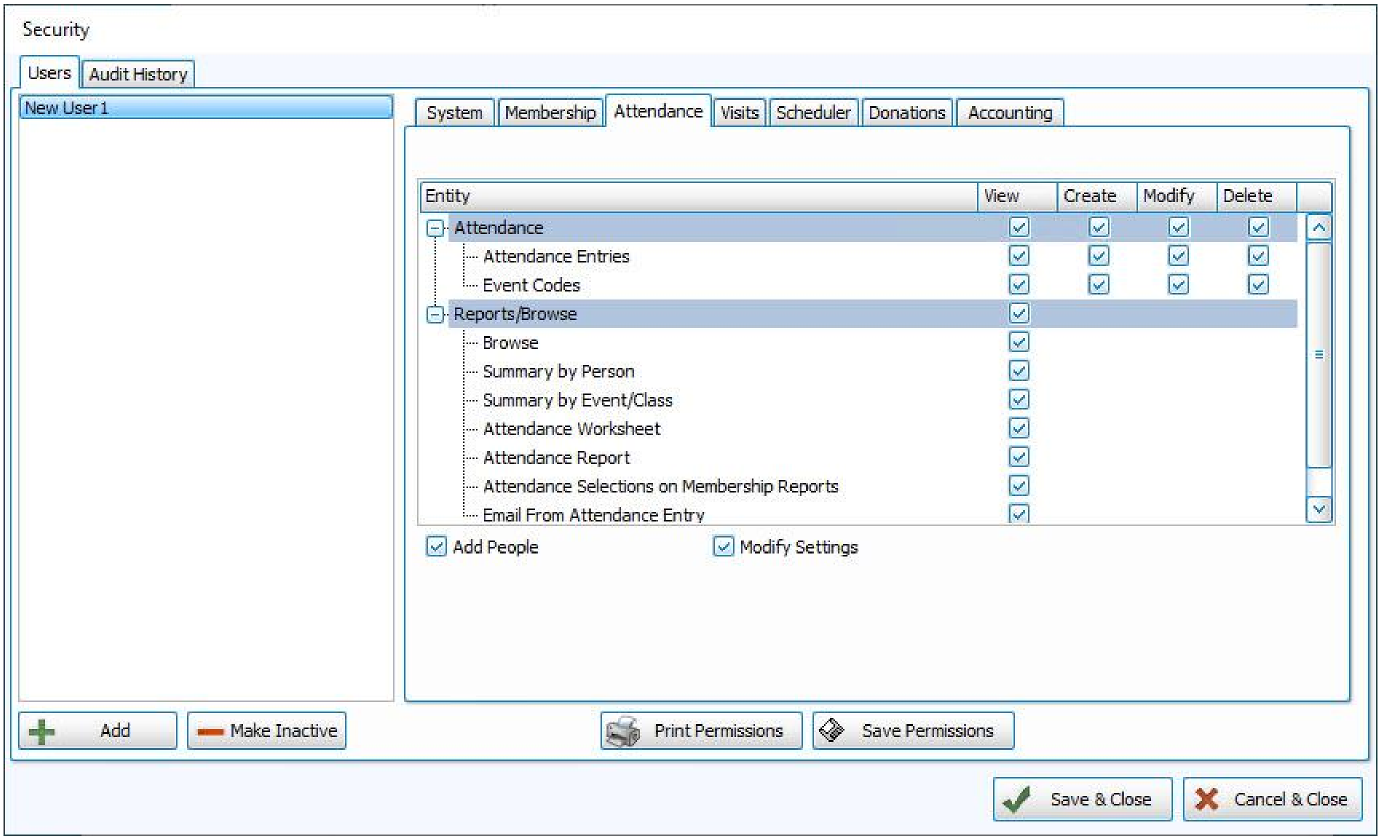
The options on this tab control the selected User's access to the Membership (pg 29) Module features of the software including The People File, Reports / Directory / Exports, Groups/Classes and Skills/Interests, and more:



> ***Note:***
>
> *Prohibiting a User from accessing **Membership** also prohibits them from accessing Attendance and Visits.*

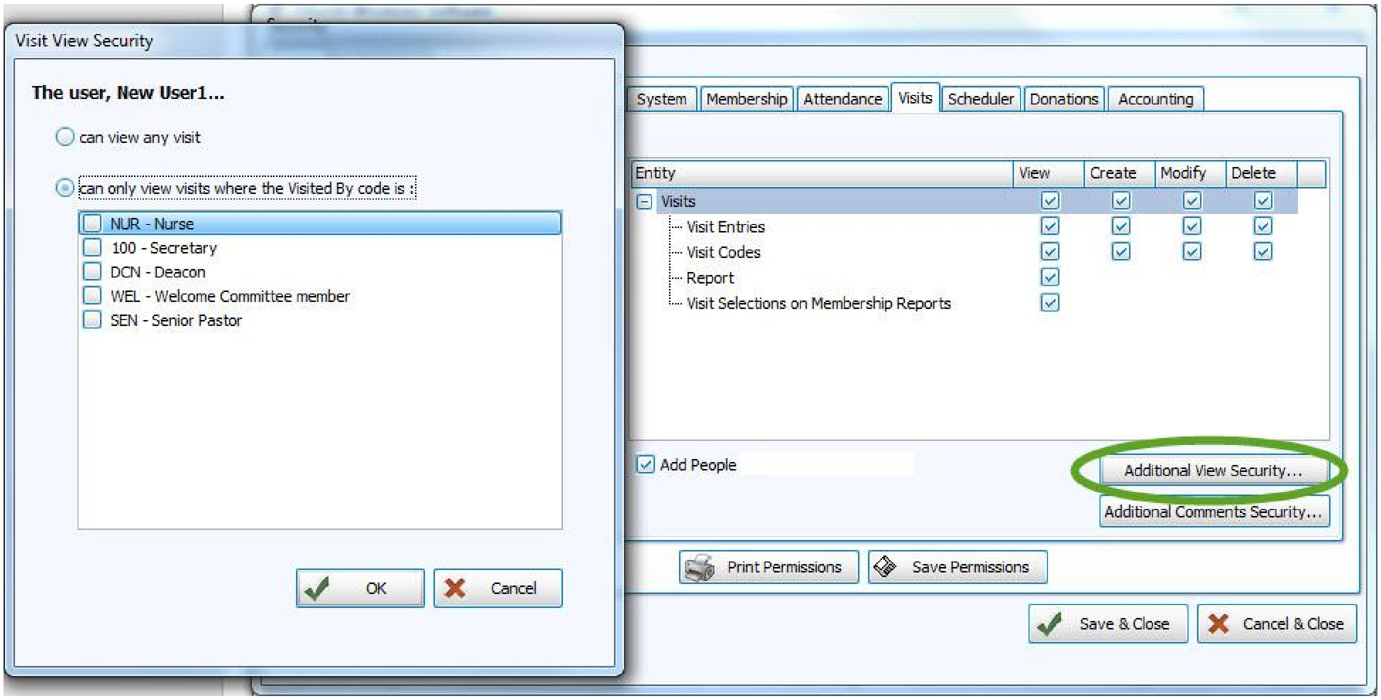
Attendance

The options on these tab control the selected User's access to the Attendance Options of the **Membership** Module of the software:

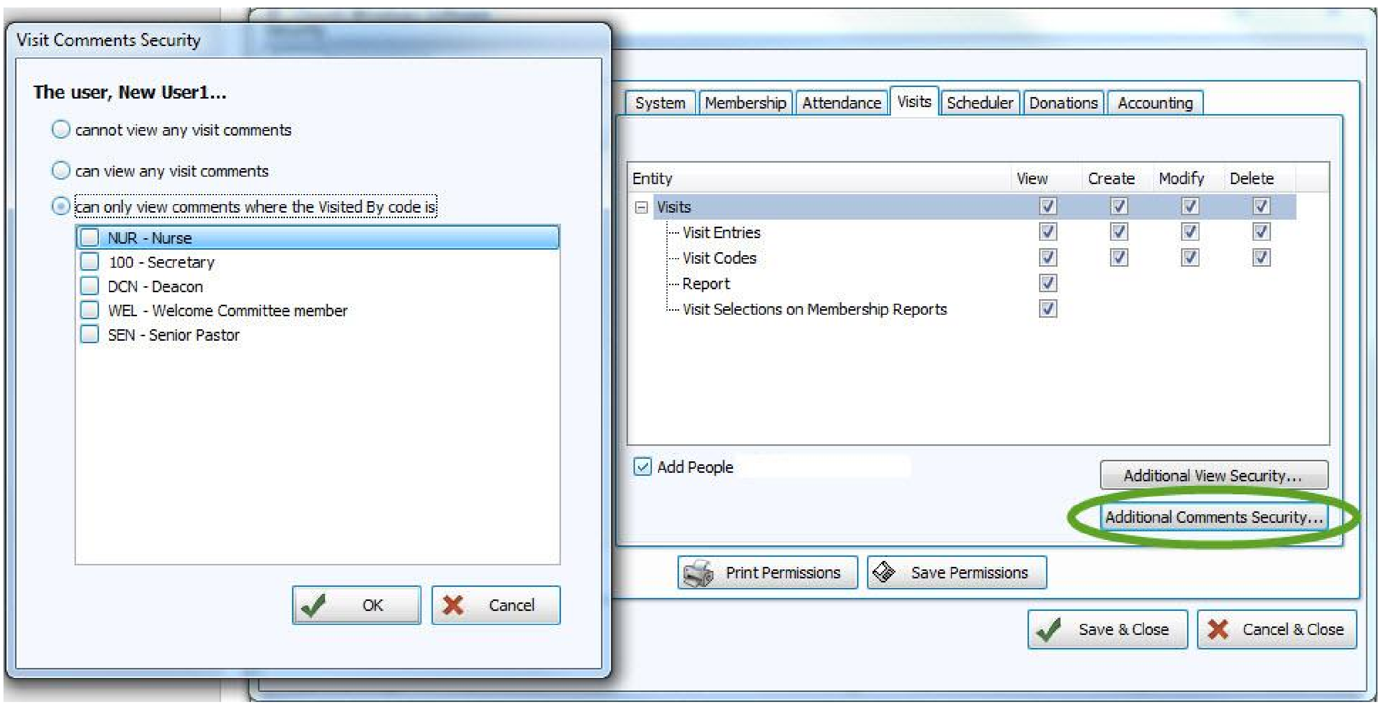


Visits

The options on these tab control the selected User's access to the Visits features of the **Membership** Module of the software. In addition to the checkbox options, there are two buttons with additional Visits view and comment options:

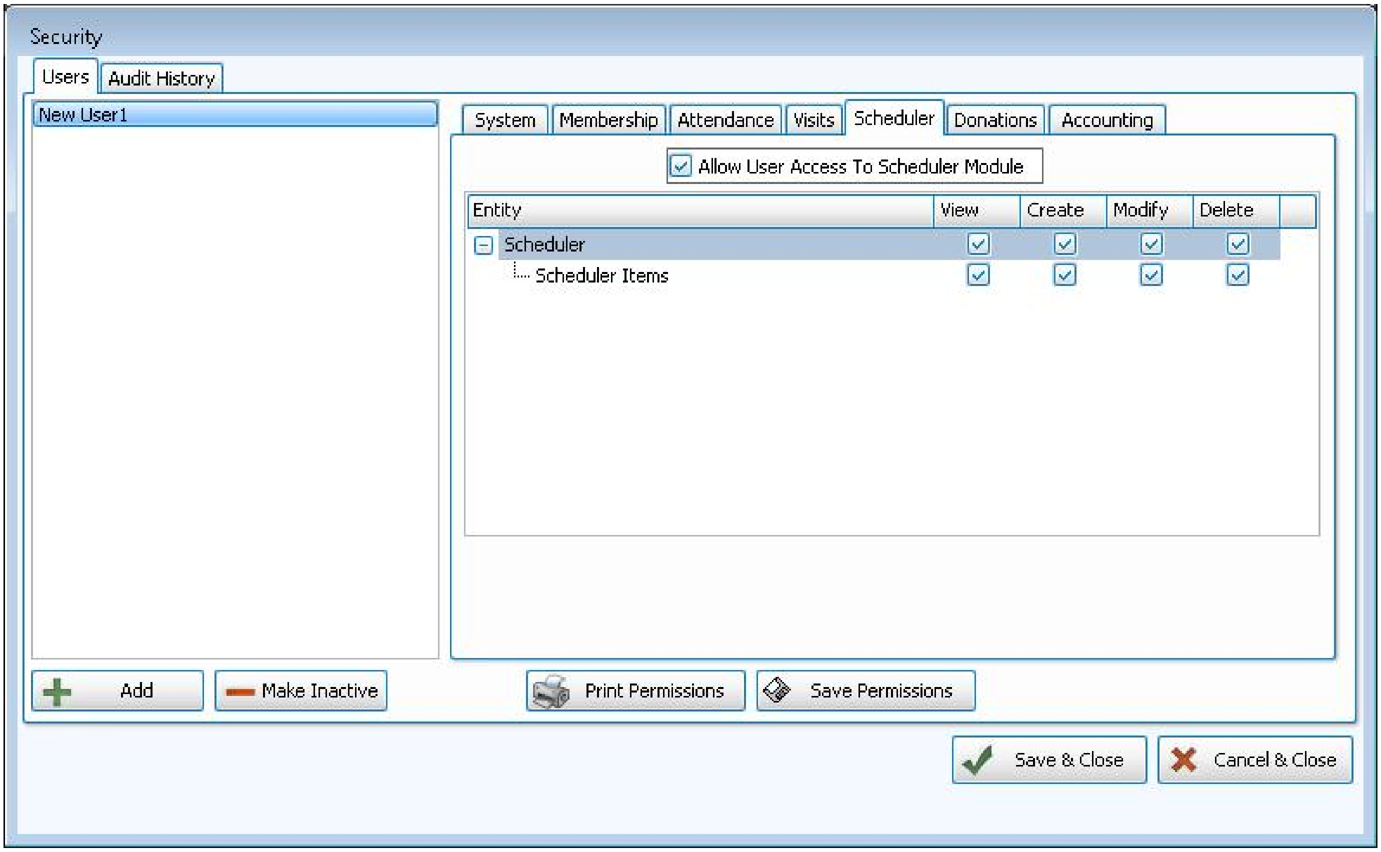


AND



Scheduler

The options on the **Scheduler** tab control the selected User's access to the Scheduler Options of Church Windows.

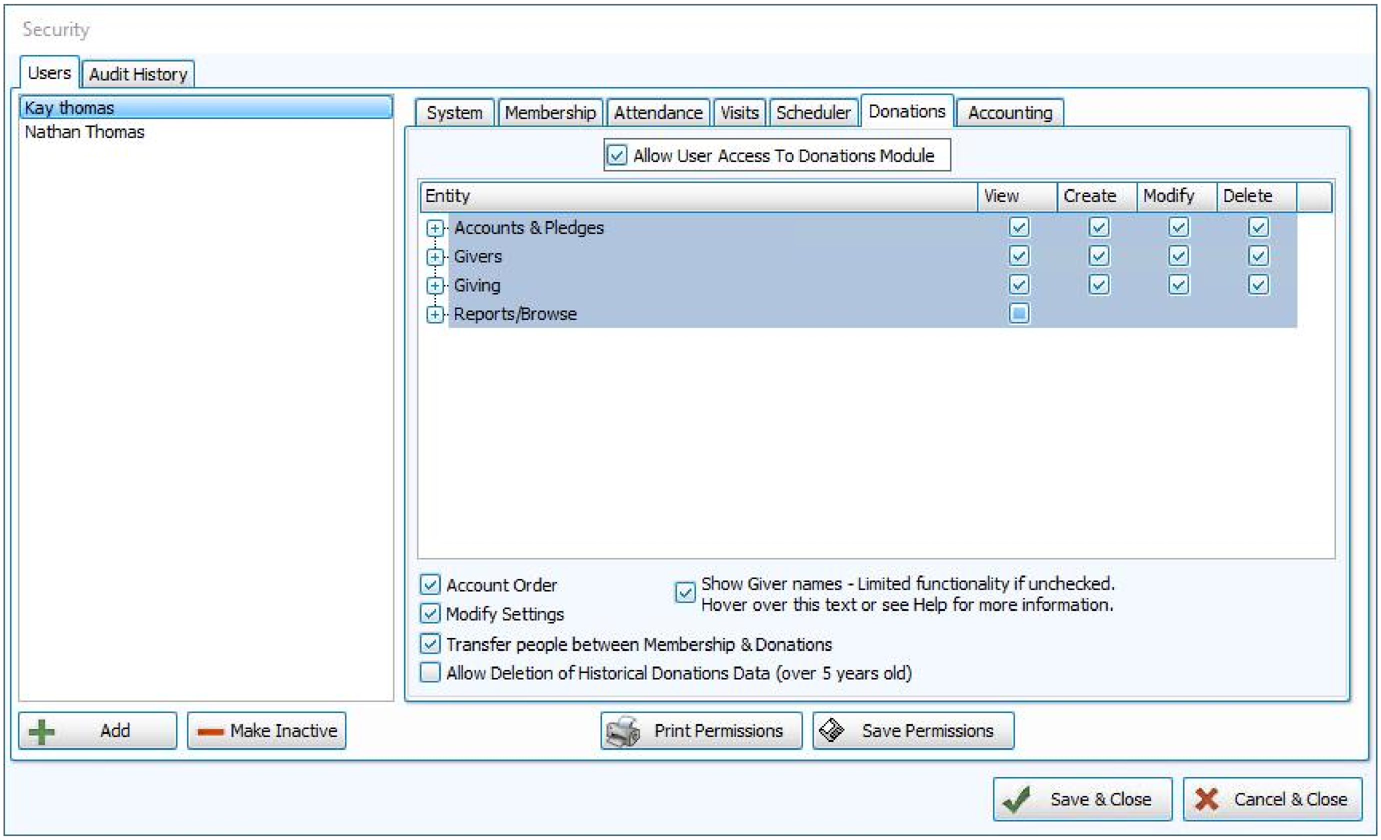


Donations

For the selected User to be able to enter, browse, and/or edit in the **Donations** Module, make sure that you place a checkmark in the **Allow User Access to Donations Module**. Or, remove the checkmark to prohibit the user from having any access.

Donations permissions are broken up into four categories:

Accounts & Pledges, **Givers**, **Giving**, and **Reports / Browse**.

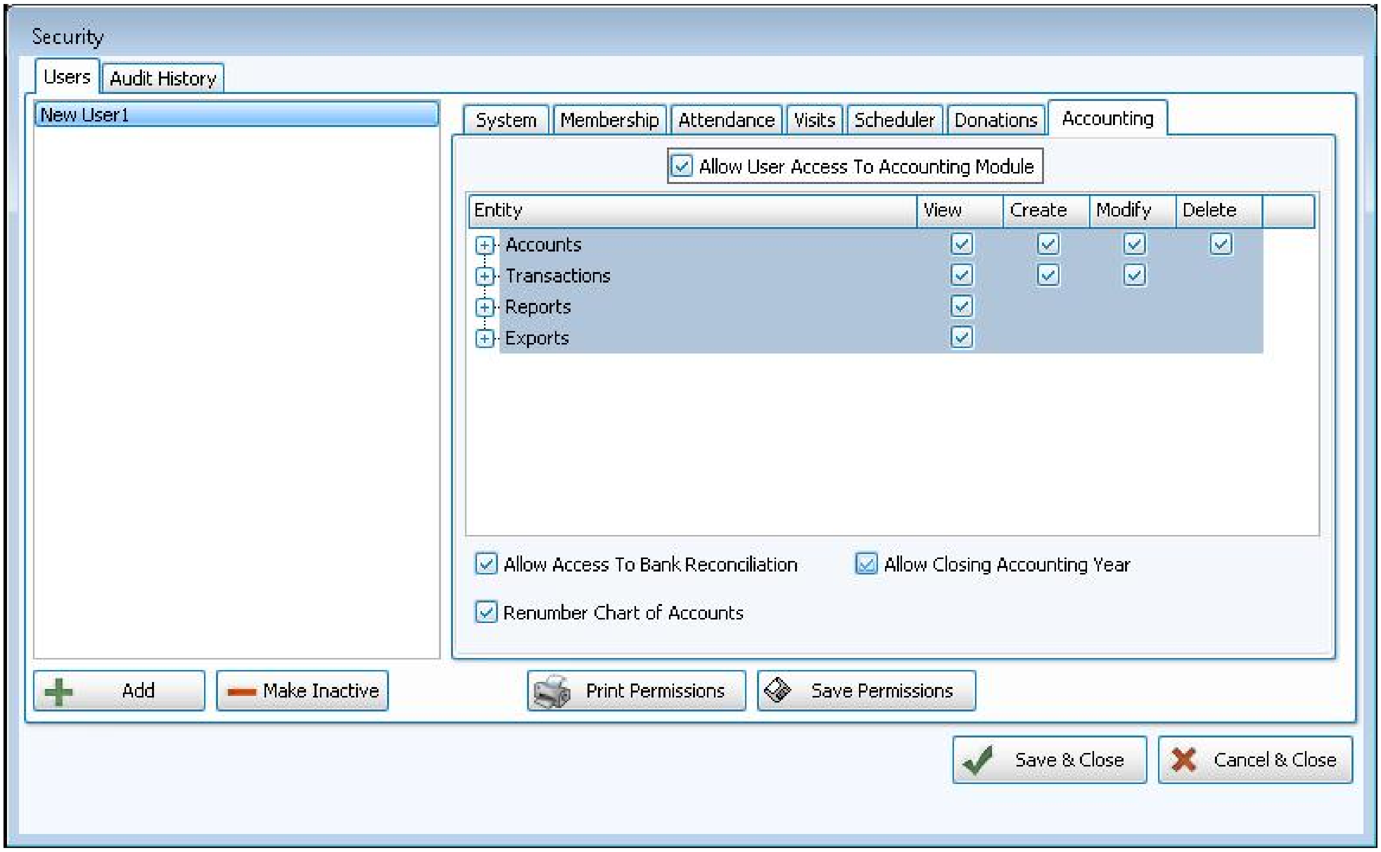


Note:

*When '**Show Giver names — Limited functionality**' is unchecked, the options you select in the list will change to allow the User to use **Donations** without seeing names. Givers without a Giver # will not be displayed. Also keep in mind that when showing Giver names is not allowed, many parts of **Donations** are not accessible.*

Accounting

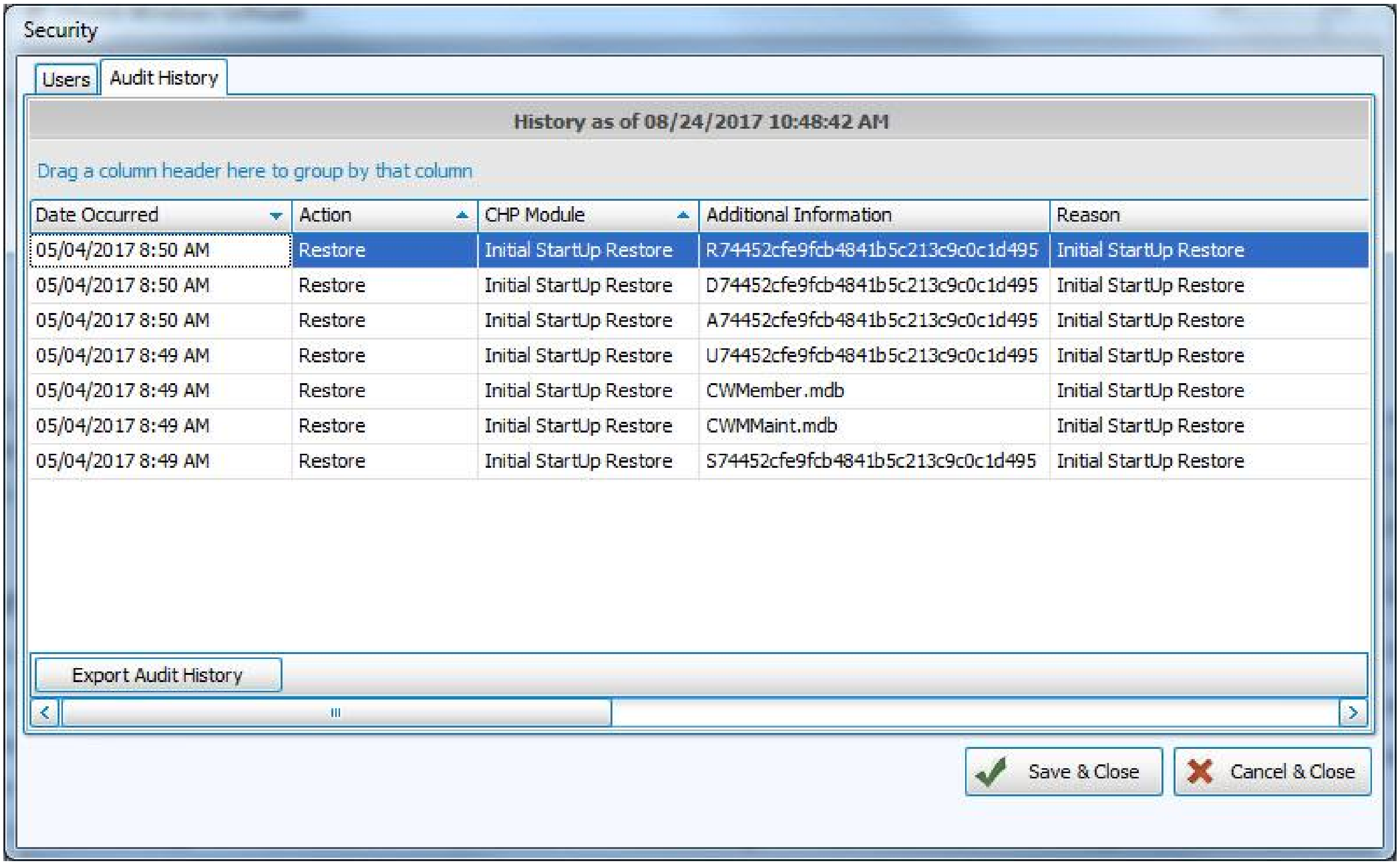
Accounting permissions are broken up into **Accounts**, Transactions, **Reports**, and **Export**.



If you wish to give the User access to the **Renumber** Chart of Accounts, **Allow Access to** Bank Reconciliation, and/or **Allow Closing Accounting Year** place a ☑ checkmark in the corresponding box.

Audit History

Keep track of data that has been backed up and restored onto your installation of Church Windows by reviewing the list found on this tab:


Security
Users
Audit History
History as of 08/24/2017 10:48:42 AM
Drag a column header here to group by that column
Date Occurred
Action
CHP Module
Additional Information
Reason
05/04/2017 8:50 AM Restore Initial StartUp Restore R74452cfe9fcb4841b5c213c9c0c1d495 Initial StartUp Restore
05/04/2017 8:50 AM Restore Initial StartUp Restore D74452cfe9fcb4841b5c213c9c0c1d495 Initial StartUp Restore
05/04/2017 8:50 AM Restore Initial StartUp Restore A74452cfe9fcb4841b5c213c9c0c1d495 Initial StartUp Restore
05/04/2017 8:49 AM Restore Initial StartUp Restore U74452cfe9fcb4841b5c213c9c0c1d495 Initial StartUp Restore
05/04/2017 8:49 AM Restore Initial StartUp Restore CWMember.mdb Initial StartUp Restore
05/04/2017 8:49 AM Restore Initial StartUp Restore CWMMaint.mdb Initial StartUp Restore
05/04/2017 8:49 AM Restore Initial StartUp Restore S74452cfe9fcb4841b5c213c9c0c1d495 Initial StartUp Restore
Export Audit History
Save & Close
Cancel & Close

Date Occurred

Shows the time and date that the action took place.

Action

Indicates if the user was **Making a Backup** *(pg 180)* or **Restoring a Backup** *(pg 182)*.

CHP Module

Shows the Module(s) affected by the item in the list.

Reason

Contains the reason that was entered by the user who made or restored a backup.

User Full Name

By having setup **Users** *(pg 189)*, this screen will also show you which user restored the data.

Computer Name

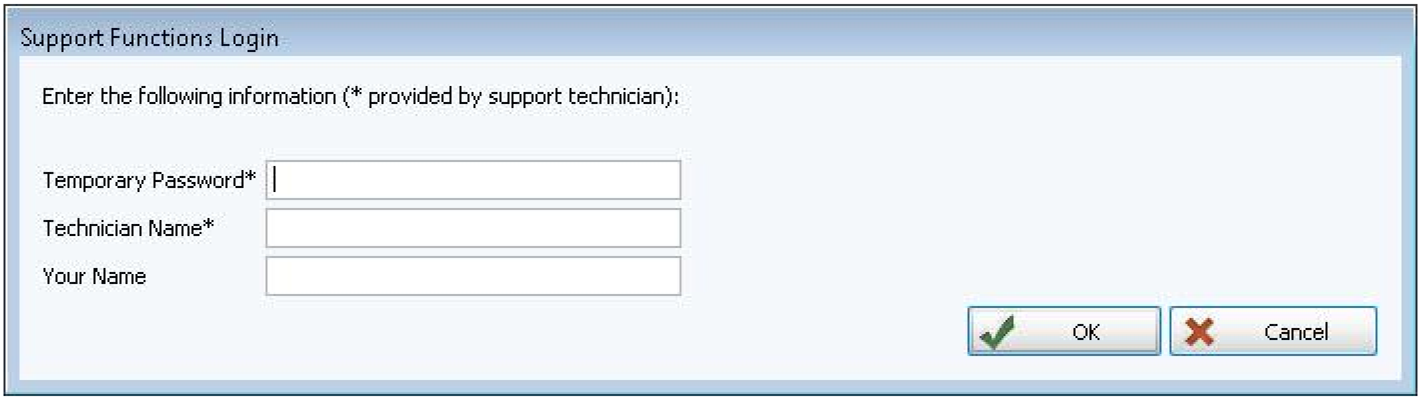
Shows the name of the computer (set up on the Computer itself).

Other columns include **Additional Information**, **Old Data**, **New Data**, **CHP Technician**, and **CHP Version**.

If you wish to document your history of **Making a Backup** *(pg 180)* and **Restoring a Backup** *(pg 182)*, you can click the button to **Export** **Audit History**. A message will show you that the file was saved to a specific location and ask you if you would like to open the folder. The file is saved as a PDF file. If you choose to open the folder you can then move the file to any other location you wish.

Support Functions

When you click on the **Administration** *(pg 178)* button and click on **Support**, you will open the **Support Functions Login** window:



These settings CANNOT be accessed without the help of a Church Windows Support Technician.

If you are having technical issues, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to ensure delivery) or visit the Support Center on our website for additional training materials. for help and if you need to access these settings, you will be provided access by the Technician.

Canada Settings

When you set your Church Windows system to Canada, changes are made to the **Membership** and **Donations** Modules to better comply with the requirements of our Canadian customers.

Set your system to Canada

- Click Administration *(pg 178)* and choose **Sys Info**(System Information *(pg 184)*).
- If you haven't already, then enter your organization's address and telephone information.
- In the **Country** field, click the dropdown button and select **Canada**.
- When you make this selection, the address fields on the **System Information** screen change to "City, Province," and "Postal Code".
- The "Tax ID" field becomes "Registration #". Enter your organization's registration number into this field. This is the registration number that will print on Donation Receipts as required by Revenue Canada.

Selecting Canada in the Country field on the **System Information** screen has the following effects in Church Windows:

Membership

In The People File:

- "City, State" becomes "City, Province"
- "Zip Code" becomes "Postal Code"

If you have already changed the names of these fields using the **Customize Fields** screen, then your previous customizations will be retained and changing to Canada will not affect these field names.

Donations

The **Donation Statements** options will include processing **Donation Receipts** and **Replacement Donation Receipts**. Each will provide you with a tab called **Options**, from which you can **Set Next Receipt #**, and enter the **Canadian Tax Agency** and **Canadian Tax Website** pertinent to your Church.

> ***'Gives with Family' in Canada***
>
> *Canada requires that Middle Initials be included on **Donation Receipts**. In Church Windows, when spouses should receive one combined receipt and are marked **Gives with Family** (pg 125) the receipt will print the family's Mailing Label instead of printing First Name, Middle Initial, Last Name. Therefore, to avoid the discrepancy, Canadian Churches should either NOT use **Gives with Family** (pg 125) or should type the Middle Initial in the Mailing Label for those who are marked **Gives with Family** (pg 125).*

Church Windows' Compliance with USPS Requirements

You must have a permit from the USPS to send out **Bulk Mailings** *(pg 202)*. If you use Standard Bulk Mail, you may qualify for a Non-Profit rate from the USPS. For further information about bulk mail, you can request "Publication 95", also known as the "Quick Service Guide", from your local postmaster or USPS.com.

There are two facets to these requirements that concern Church Windows:

- **CASS Certification and NCOA Processing** *(pg 210)* of your addresses
- **Printing Labels with Barcodes** *(pg 204)*

Church Windows also works in conjunction with **Postage $aver** *(pg 202)*, a program that is a PAVE-Gold certified program that processes your bulk mailings in a manner that may reduce your mailing costs. PAVE-Gold is the highest level of certification that a program can attain with the United States Postal Service (USPS). We have chosen Postage $aver as our partner to make Church Windows more powerful in the administration of your organization's mailing capabilities. Contact Church Windows Sales at 800.533.5227 or sales@churchwindows.com or visit savepostage.com for more information.

Bulk Mailings

Church Windows accommodates US Post Office requirements for discounted rates for bulk mailings. If you choose to prepare your mail to meet USPS requirements for discounted mailings, then you may take advantage of these features of Church Windows. Please speak to a representative at your local Post Office for detailed information about their requirements for bulk mailings and see **Church Windows' Compliance with USPS Requirements** *(pg 201)*.

Another great resource for bulk mail is found on the **Postage $aver** *(pg 202)* website at www.savepostage.com. Click the link "Bulk Mail Tutorial for Beginners" for an overview. Another bulk mailing option available through the US Post Office is called PostalOne, see their website - www.usps.com/postalone - for further information.

If you are going to be printing barcodes on your Labels, you need to send your data for **CASS Certification and NCOA Processing** *(pg 210)*. The postal service will certify your addresses one time for free, every time after that you need to pay for the service. Lorton Data is the company we recommend to handle all your Coding Accuracy Support System (CASS) Certification needs. Please contact your local Postmaster for further details.

Postage $aver

What is Postage $aver?

Postage $aver is a PAVE-Gold certified program that processes your bulk mailings in a manner that may reduce your mailing costs. PAVE-Gold is the highest level of certification that a program can attain with the United States Postal Service (USPS). We have chosen Postage $aver as our partner to make Church Windows more powerful in the administration of your organization's mailing capabilities. Use Postage $aver for mailings of over 200 pieces.

How can I get Postage $aver?

If you would like to try **Postage $aver**, you may install a trial version from the Church Windows Installation CD or from their website: savepostage.com. After installing the program, go to **Administration** *(pg 178)*, **System Information** *(pg 184)* and click the **Browse** button by the **Postage $aver Location** box. After the program finds the location, click **OK**. At that point a message will appear notifying you that you have begun the 30-day trial. When the trial period is over, you will need to purchase Postage $aver to continue using it. Contact Church Windows Sales at 800.533.5227 to purchase the program.

Using Postage $aver with Church Windows

After **Postage $aver** *(pg 202)* is installed following their instructions and the correct Church Windows serial number is entered. Click Browse at the bottom of the screen in the Postage $aver section and it will browse the mapped drives automatically to find the Postage $aver program.

Before you can create Labels with barcodes, you need to link Postage $aver with Church Windows.

- To finish linking the programs, put a check in **Use Postage $aver**.
- If Postage $aver is installed on your computer, the program will search for it and fill in the File Location.
- If for some reason, Church Windows does not see Postage $aver, you can click the box with three dots and browse to where you have installed your Postage $aver.
- Once the File Location is chosen, click OK.

If Postage $aver cannot be found on a mapped drive, an explorer window will appear and you can point the system to the correct drive. The drive does not have to be mapped for Postage $aver to work. This step will need to be completed on each computer that will have access to the Postage $aver program.

If you would like to try **Postage $aver**, you may install a trial version from the Church Windows Installation CD:

- After you complete the **Church Windows Installation** *(pg 6)*, go to **Administration** *(pg 178)*.
- Choose **System Information** *(pg 184)*.
- Click the **Browse** button by the **Postage $aver Location** box.
- After the program finds the location, click **OK**.
- At that point a message will appear notifying you that you have begun the 30-day trial.

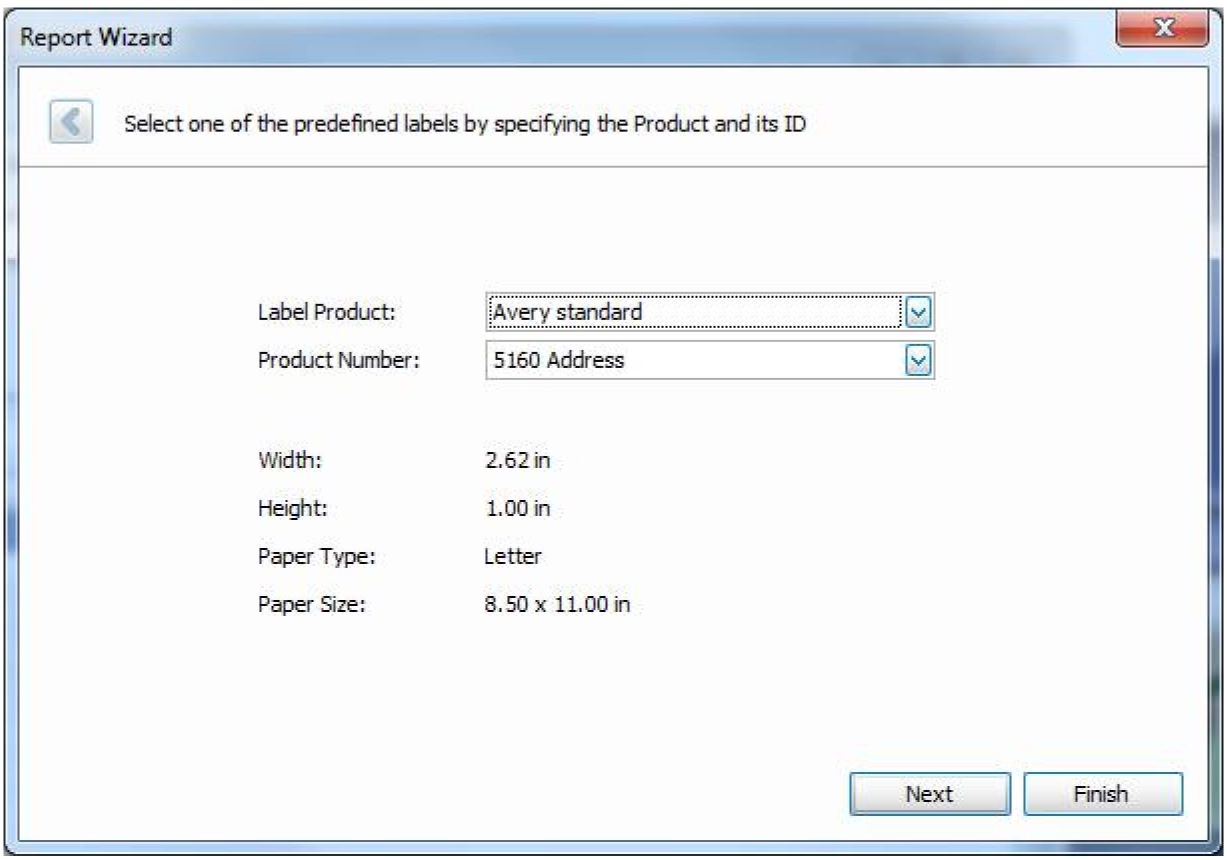
When the trial period is over, you will need to purchase Postage $aver to continue using it. Contact Church Windows Sales at 800.533.5227 to purchase the program. If you choose to purchase the program, you will receive an email from Postage $aver Software containing registration number and an update code. (You may have to enter this information on each separate workstation that will run Postage $aver reports.) Until this is correctly entered, you can use the program on a 45-day free trial.

Printing Labels with Barcodes

When you choose to use Postage $aver, it will allow a barcode to be printed for each address. Once the programs are linked, then you will see the barcode options available in the label Report Designer toolbox. To print Barcodes on your Labels, you will need to select a Label Layout or create a New Label that includes a barcode field.

Create a label layout with a barcode

- Click **+ New Label**.
- Select the **Label Products** and the **Product Number** for the labels you will use. You may use any label product you prefer; just make certain the label is *at least 3 ½ inches wide* to accommodate the Intelligent Bar Code. (Avery 5262 is one option.):



- Click → Next *only if* you need to adjust the label's parameters.

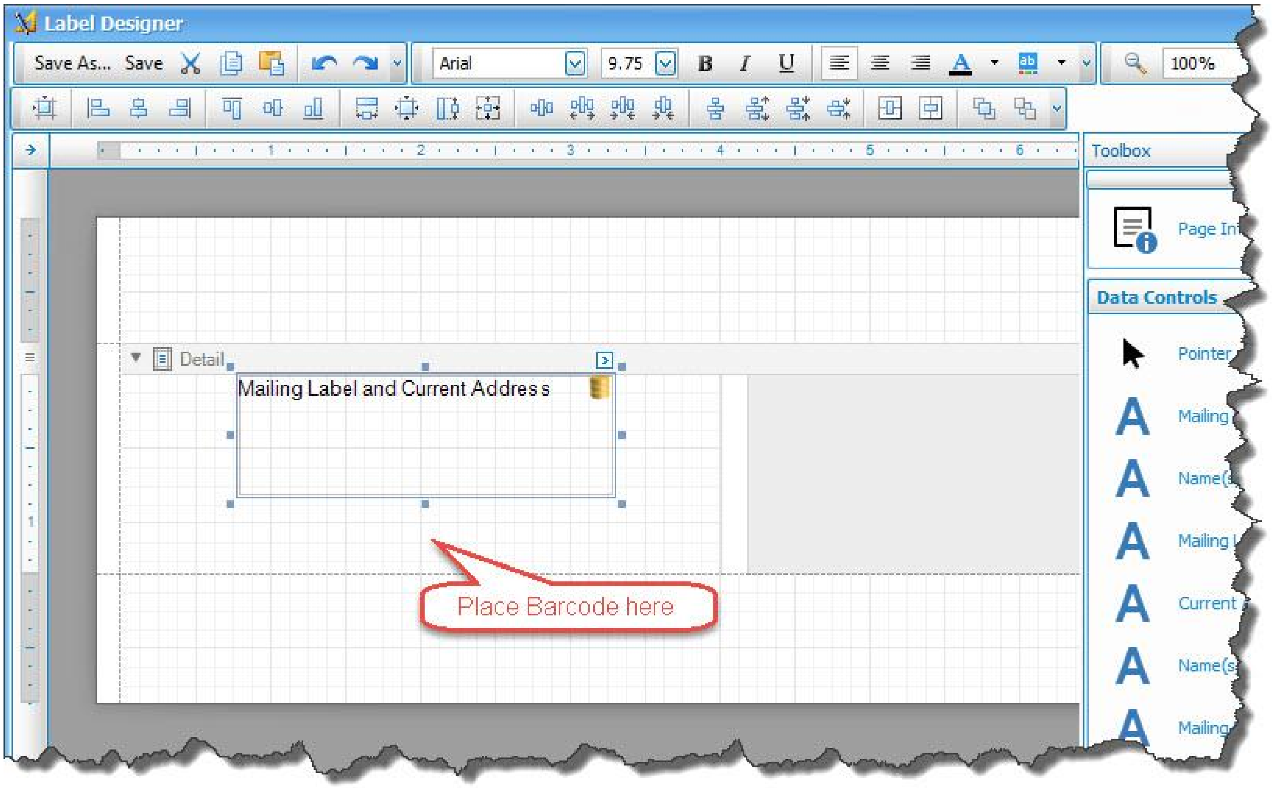
> ***Note:***
>
> *You do not usually have to do this step Church Windows is configured to work with all of the labels listed preset according to the* ***Label Product Company****. If, however, you have purchased an off-brand of labels designed to work as one of the standard ones, you might have to adjust the label's parameters.*
>
> *We recommend that you first use the parameters set in the program, get to the point where you can print a page of labels. Print them on a blank sheet of paper, hold the paper up to a page of the labels and check how they fit. Only if they do not line up correctly should you choose to adjust the parameters.*

- Click **Finish**.
- The Report Designer will open. This is where the layout information is selected that will print on the label.
- The system defaults to putting a layout on the label of "*Mailing Label and Current Address*". This means the label would print whatever is entered into the **Mailing Label** field in The Family Record and the current address. A typical entry would read:

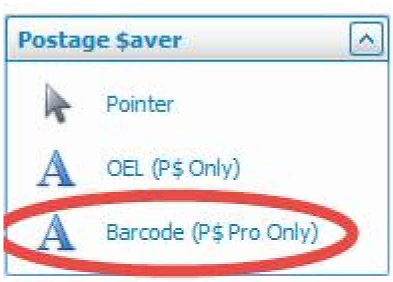
  MR. & MRS. JOHN SMITH
  3245 ASH TREE LANE
  WHATEVER CITY, OH 45290

- With the left mouse click on the box that says *Mailing Label and Current Address* under the *Detail* bar. Holding the left mouse down, drag the box up a little on the screen.

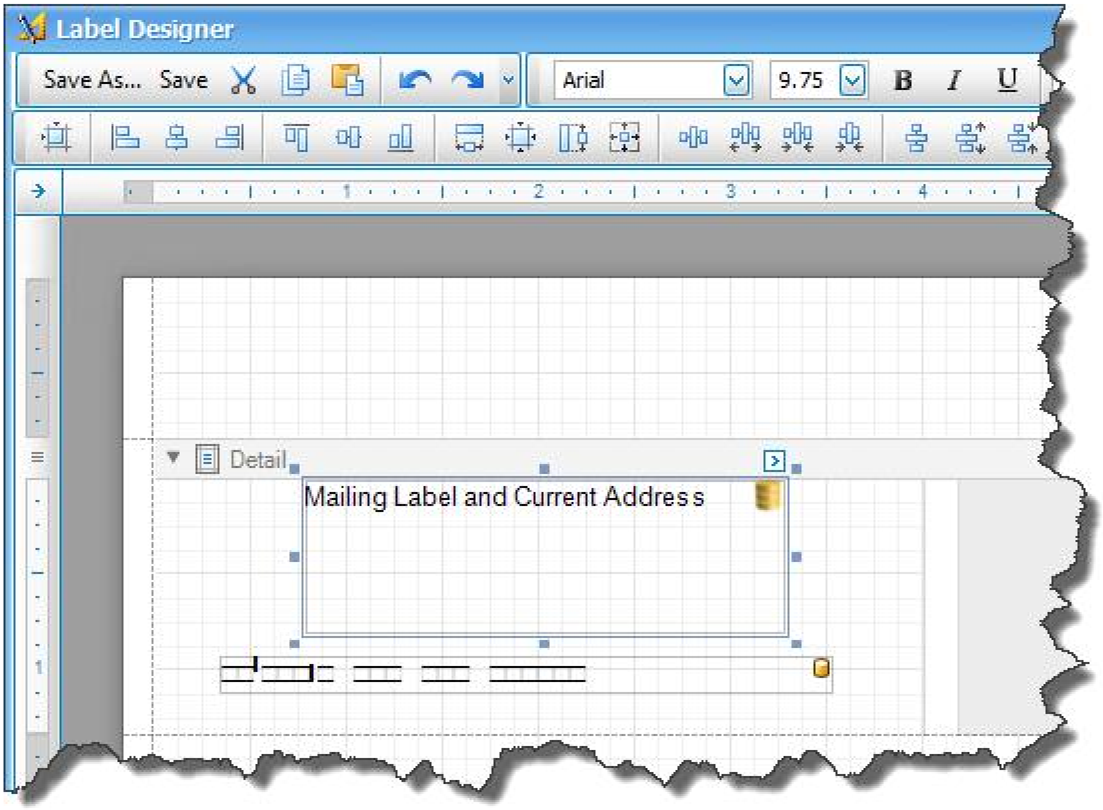
- There should now be space below the *Mailing Label and Current Address* box for another field:



- Look to the far right side of the screen at the **Tool Box** section.
- You will see:
  - Standard Controls
  - Data Controls
  - **Postage $aver** *(pg 202)*
- The Postage $aver section of the Designer contains the Barcode field:



- Click on the Barcode field, hold the left-mouse down and drag the field to place it on the label below the *Mailing Label and Current Address* box:



- If there is any pink/red color on the **Report Designer**, it means the fields are overlapping. Click on each field, hold the left-mouse down and adjust them as needed until the pink disappears.
- At the top of the screen, click **Save As** and assign the label a name. Name the label so you will know what is on it. Include in the name the type of label and the layout used, for example, "Avery 5262 with barcode".

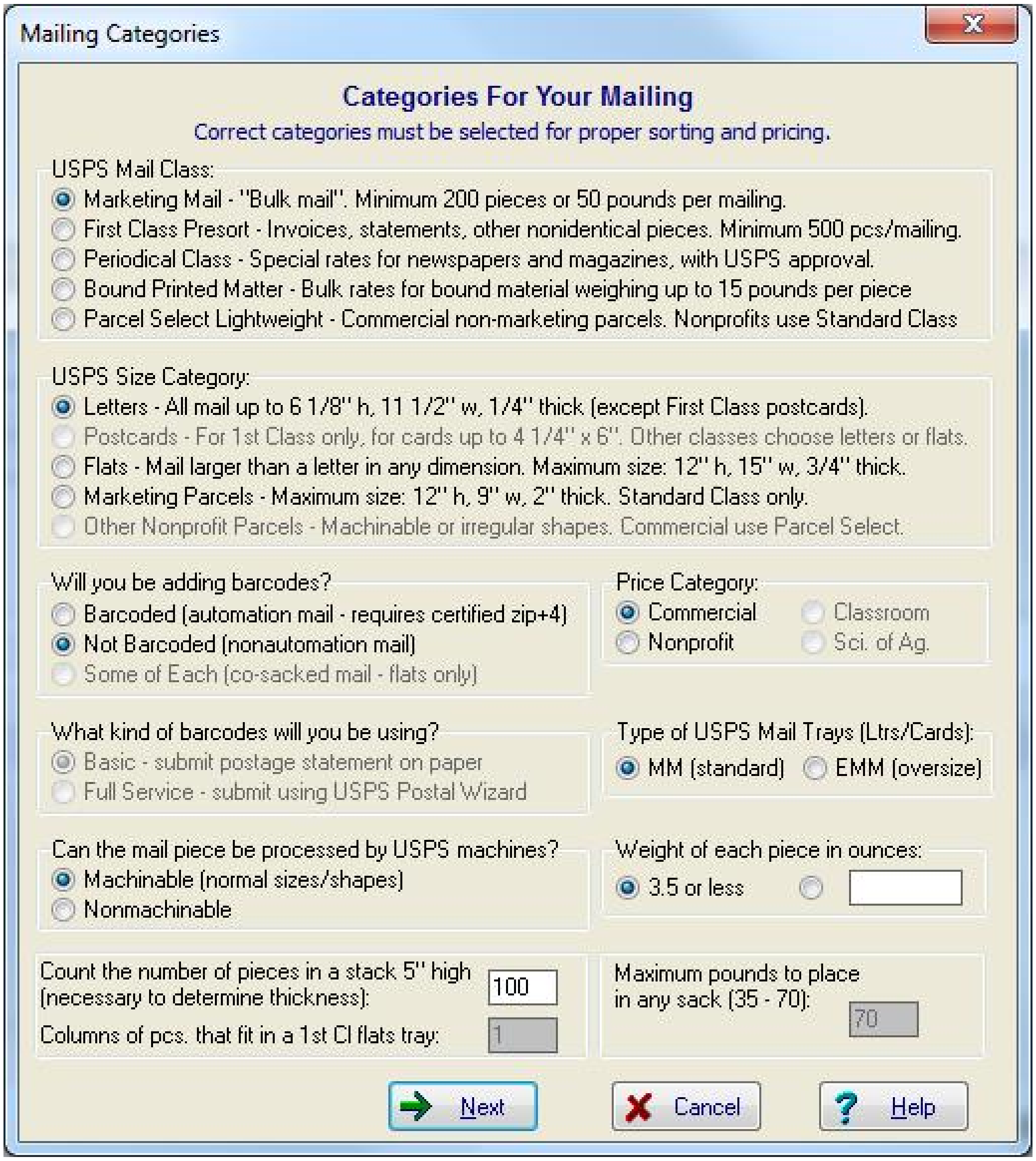
> **Note:**
>
> *When naming a new report layout, keep in mind that you are creating a* ***template*** *which can be used for other reports with different data in the future, therefore names should NOT include specific dates or the search criteria you used to compile the report. Instead, the name should indicate what kind of information will be included in the report.*

- Click OK to save the title.
- Click the X in the upper right corner of the screen to close the **Report Designer** screen.

- The label is now ready to use for your next bulk mailing.

> ***Note:***
>
> *Barcodes are not needed unless you are sending thousands of pieces of mail and they must be identical, i.e. a newsletter. Donation Statements are rejected because there are variations such as names and amount of information on each one. Bulk Mail rate requires 200 pieces or more and does not require Barcodes on those pieces of mail.*
>
> ***The USPS states**: Barcoding your mail may entitle you to a lower Step 2 — Select the Label Layout postage price, but ONLY if all the other requirements for automation postage prices are met. A barcode alone will NOT qualify your mail for automation prices.*
>
> *In general, the US Postal Service recommends that, unless you are preparing a mailing for automation prices, you should NOT put barcodes on the mail pieces. As long as the mailing address is correct, your mail will still be processed efficiently without a barcode—and you won't need to worry about having the wrong barcode on your mail. A bad (incorrect) barcode is much worse than no barcode at all. A bad barcode can cause your mail piece to travel to the wrong destination.*

Once you complete your settings on the Step 2 — Select the Label Layout screen, click **Print** to begin the Postage $aver process:



It is **critical** that the screens are completed properly for the mailing to be accepted by the USPS Postmaster. The user assumes ALL responsibility for ALL postage costs associated with the use of this software.

Each Postage $aver screen that now appears will have the most current Help information. Please consult the Postage $aver help within the Postage $aver program by clicking the 

button in the bottom right of the Postage $aver dialogue screens. Also consult the USPS (www.usps.com) for the most current mailing requirements.

Once Postage $aver has all of the necessary settings entered, it will read your label selection and re-sort them to the correct USPS requirements.

You will have the option to print three reports at this time. If you choose to skip these reports now, you can access them from the Postage $aver software directly until the next mailing process you do.

1. **Mail Preparation Instructions**
   This helps you organize your mailing, tells you how much money to take to the Post office, and it gives you the information for the USPS Statement.

2. **USPS Qualification Report**
   Take this to the USPS office when you drop off your mailing.

3. **Tray/Sack Tags**
   This will print cards to label your trays and sacks. For this report you can use Avery 5371 (Postcards/Business Cards for laser printers) or Avery 8371 (Postcards/Business Cards for ink jet).

Finally, the Labels will be generated. If during the envelope labeling process, they get out of order, the "**Mail Preparation Instructions**" report will guide you in getting the correct items in the tray or sack.

CASS Certification and NCOA Processing

If you will be **Printing Labels with Barcodes** *(pg 204)*, certification needs to be done by a firm certified by the USPS first. The postal service will certify your addresses one time for free, every time after that you will need to pay for the service. *Lorton Data* in Minneapolis is the company we recommend to handle all your **Coding Accuracy Support System (CASS) Certification** needs. *Lorton* has agreed to accept the input and format the output disk to match the USPS functions that exist in Church Windows.

The *Lorton* certification request form can be accessed from the "Partners" area of our website at www.churchwindows.com. For your convenience, we have taken the opportunity to fill in some of the information required. Your addresses should be **CASS** certified at least every six months. Questions about sending data to *Lorton*, pricing, etc. should be directed to them, visit www.lortondata.com or call 651.203.8290. Please pay special attention to the section where we have added the text "retain case". Without this notation, your data may be returned in all upper case. It is OK for your data to be in mixed case as Church Windows will convert to upper case and strip punctuation when you print mailing labels.

Not sure if you need CASS/NCOA?

We recommend reading the general information posted by **Postage $aver** *(pg 202)* at www.bulkmail.info and specifically at http://bulkmail.info/moveupdate.html. You can also contact your local Postmaster for further details.

Once you have determined that you need to have your addresses certified, you can **Create a CASS/NCOA file** *(pg 211)* and then **Import your Output from Lorton** *(pg 213)* to learn how to export and import the data.

Create a CASS/NCOA file

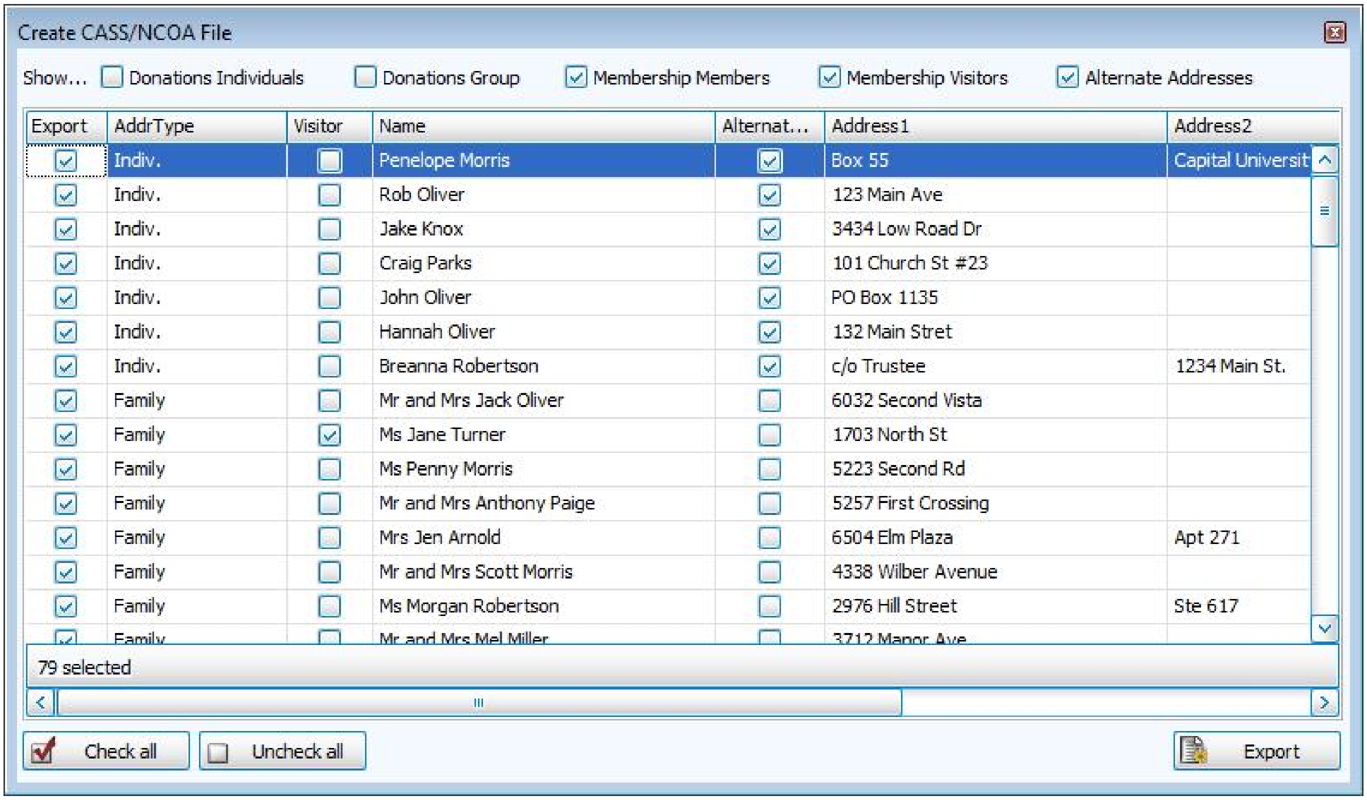
If you are going to be **Printing Labels with Barcodes** *(pg 204)*, you need to send your data for CASS Certification and NCOA Processing. The postal service will certify your addresses one time for free, every time after that you need to pay for the service.

Important!

To create a file to have your addresses certified, you (and any other **Users** *(pg 189)*) may not have The People File open.

- From The Initial Portal of Church Windows choose either **Membership** or **Donations**
- Select **Special Functions** from the top Button Bar
- Click **NCOA**

- Choose **Create CASS/NCOA file**:



- At the top of the screen, place a checkmark next to the kind(s) of information you wish to export.
- Place a checkmark next to the item in the **Export** column for each line of information you wish to export.
- Click **Check All** or **Uncheck All** to do so in the list of items.
- Click the **Export** button.
- When the **Export to File** screen appears, click the ellipses button.
- Choose the location you wish to export your file.
  - You can save the file to a folder on your computer and email it.
  - Alternately, use removable media (e.g. floppy disk, flash drive).
- Press the **Save** button.
- The box next to the ellipses button will show you the path and name of the file. (By default, the file will be called uspsconv.csv)
- The file will be saved as a "Comma Separated Value" (CSV) file.
- Click **OK** and a message will tell you where the file was created and if you would like to open the folder where the file resides.

- If you are emailing Lorton your file, just follow their instructions to send them your uspsconv file.
- Otherwise, transfer the file to a newly created media and label it per the instructions on the Lorton form (usually Input), and take another blank media disk and label it "output " per the instructions.
- Be sure to put your Church name, address and phone number on each piece of media.
- Complete the forms per the enclosed samples.
- Enclose the completed Lorton forms.

> ***Note:***
>
> *Remember that after you send your data away for processing, any name or address changes that you make before you get your data back will be lost when you restore the output into Church Windows. Please **refrain** from making name and address changes until after you **Import your Output from Lorton** (pg 213) or the USPS.*

Import your Output from Lorton

First, *always back up your current data* before importing any data from Lorton. Mistakes can happen and your data is too valuable to be damaged by a faulty disk/file. After **Making a Backup** *(pg 180)*, then open the program so that you are at **Opening Church Windows** *(pg 3)*. To run the import routine, you may not have The People File open.

- From The Initial Portal of Church Windows choose either **Membership** or **Donations**
- Select **Special Functions** from the top Button Bar
- Click **NCOA**
- Choose **Import CASS/NCOA file**
- Click the **Select File** button and locate the file (most likely in your downloads folder if you cannot find it). When you locate it, click the file and click the **Open** button.
- Click **Import** to complete the installation of your output from Lorton.