churchwindows
MANAGEMENT SOFTWARE

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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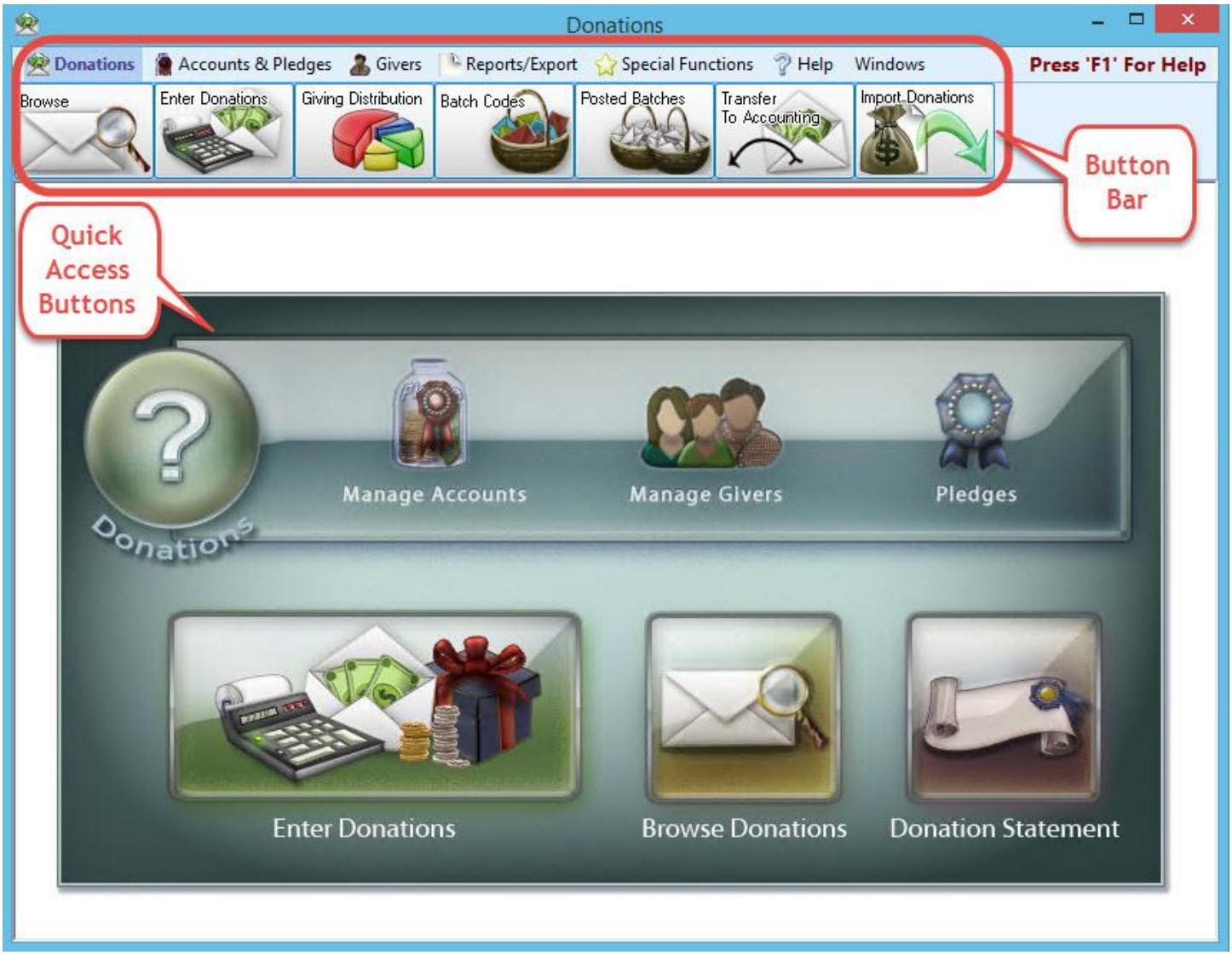
Table of Contents

Chapter 1 - Donations Overview

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 29)* screen, while money that is declared in a commitment to be given is recorded in the software using **Pledges** *(pg 98)*.

When you click on the **Donations** button from The Initial Portal, 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 *(pg 85)*, **Manage Givers** *(pg 133)*, and **Pledges** *(pg 98)*

Enter Donations *(pg 29)*, **Browse Donations** *(pg 10)*, and **Donation Statements** *(pg 248)*

Button Bar

Donations

These allow you to **Browse Donations** *(pg 10)*, **Enter Donations** *(pg 29)*, specify how the **Giving Distribution** *(pg 46)* divides donations, customize **Batch Codes** *(pg 53)*, view and reverse or **Correct Posted Batches** *(pg 57)*, **Transfer Donations to Accounting** *(pg 66)* (if the Church has also purchased the **Accounting** Module), and **Import Donations** *(pg 73)* from a third party company.

Accounts & Pledges

These give various options to **Manage Accounts** *(pg 85)*, **Add an Account** *(pg 86)*, **Order Giving Accounts** *(pg 95)*, and it allows you to view and enter **Pledges** *(pg 98)*, and work with **Subtotals** *(pg 129)*.

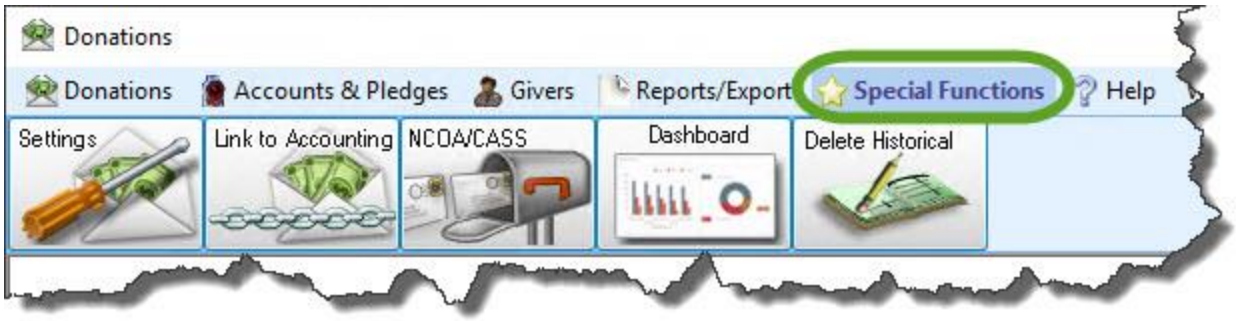
Givers

These options let you **Manage Givers** *(pg 133)*, **Add Givers** *(pg 144)*, **Add a Group Giver** *(pg 148)*, **Transfer Donations** *(pg 149)*, as well as **Manage Giver Numbers** *(pg 156)* and **Auto Assign Giver Numbers** *(pg 168)*.

Reports / Export

These options give you the ability to run **Reports, Labels, and Statements** *(pg 191)*, **Compare & Analyze** *(pg 192)* the giving and pledging, and view / send / print **Donation Statements** *(pg 248)*.

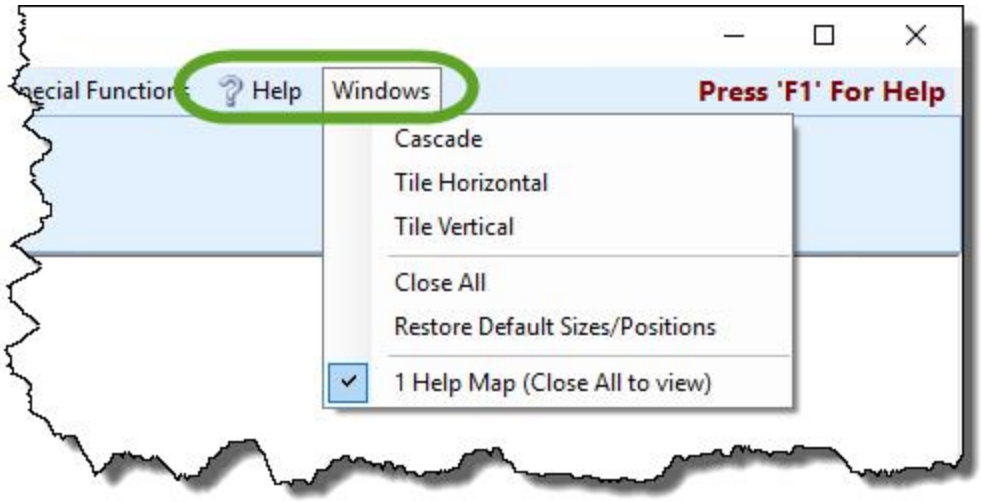
Special Functions



Here you can modify the **Donations Settings** *(pg 297)* to customize each Users' preferences, **Link Donations to Accounting** *(pg 301)* for transfer, setup and utilize the CASS Certification and NCOA Processing, view charts and graphs in the **Donations Dashboard** *(pg 306)*, and remove out-dated information from the database using **Delete Historical** *(pg 319)*.

Help and Windows

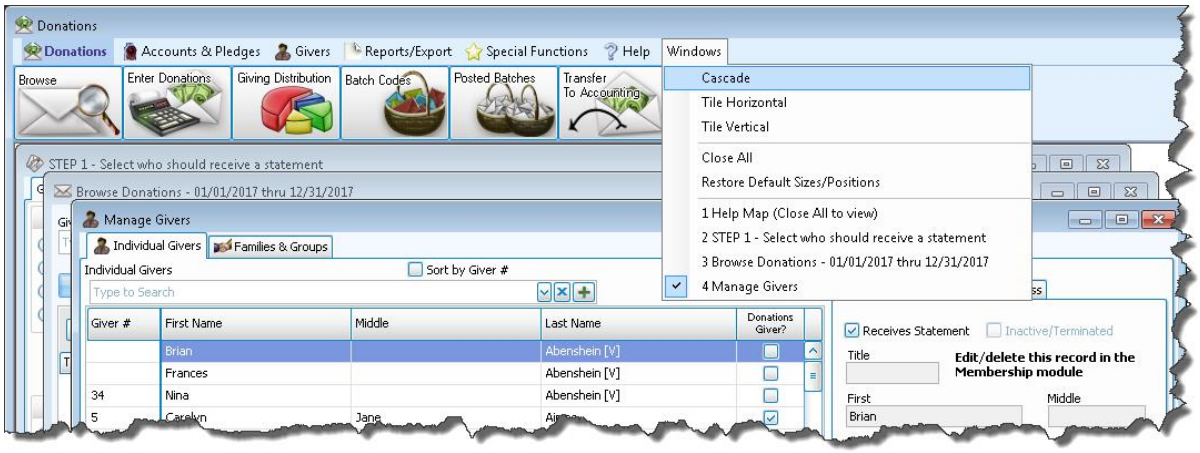
The final two options in the Button Bar across the top of the screen are **Help** and **Windows**.



? 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.

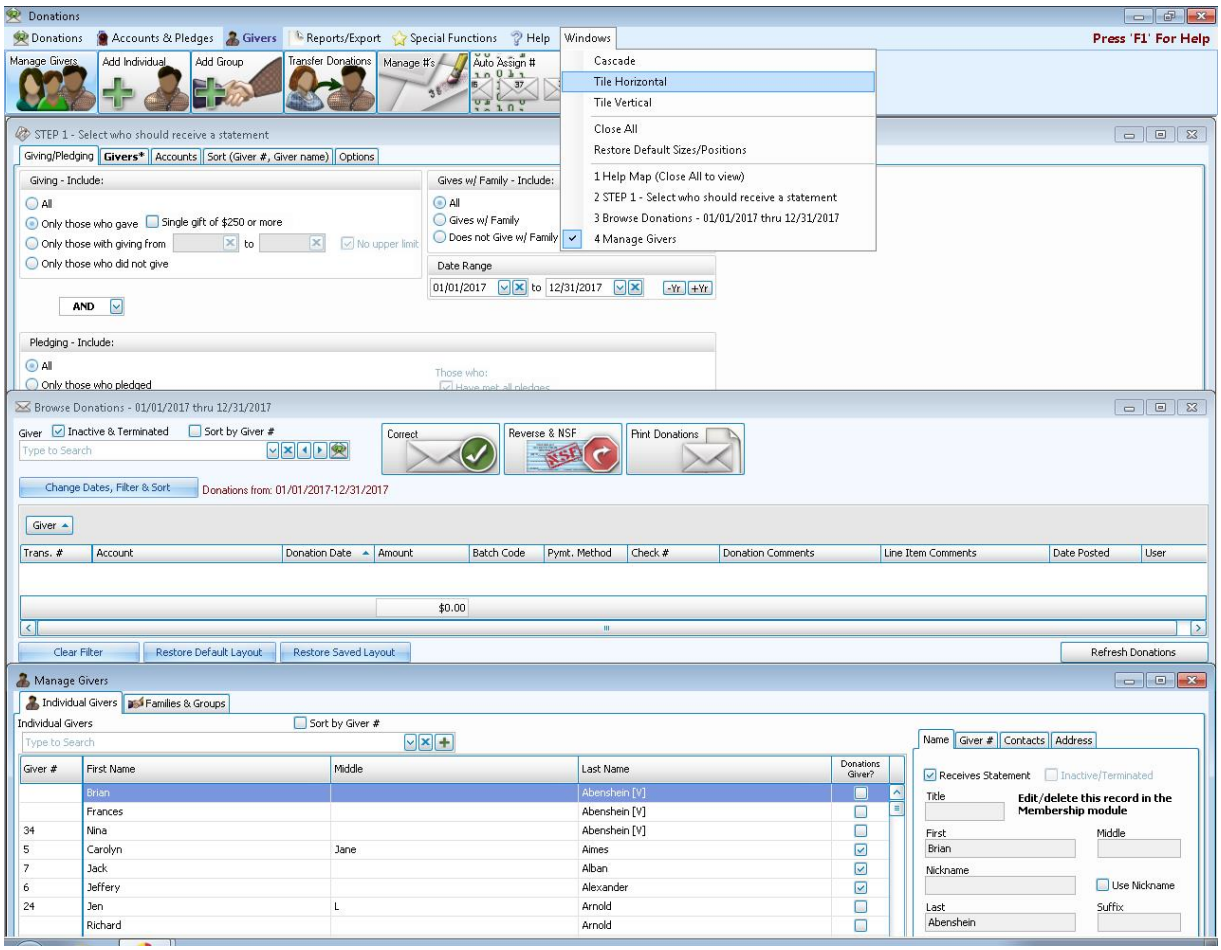
The **Windows** dropdown menu is divided into three sections which allow you to adjust how your windows or screens appear in the current Module. These options are quite handy when multitasking with various functions in the software.

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:



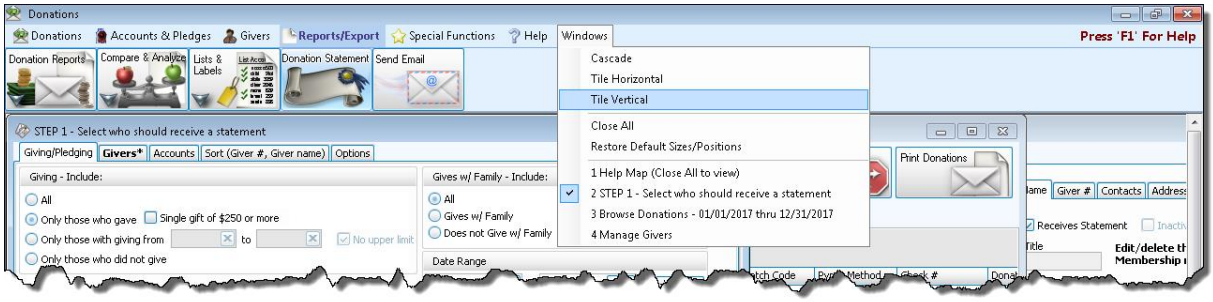
- **Tile Horizontal**

  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 Return the screens to their original size and position

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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.

Chapter 2 - 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** *(pg 144)* and **Assign Giver Numbers** *(pg 162)*.
- **Manage Accounts** *(pg 85)* towards which the Givers make their donations.
- Enter **Pledges** *(pg 98)* and **Add a New Campaign** *(pg 111)*.
- **Enter Donations** *(pg 29)*.
- Run **Reports, Labels, and Statements** *(pg 191)* for the Givers and Giving Accounts.

If you use the Accounting Module of Church Windows, the **Donations** Module will also make available to you a feature to **Transfer Donations to Accounting** *(pg 66)* 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 Module and places them in a list of Givers for you to define who receives **Donation Statements** *(pg 248)* and if they will be **Giving as a Family or Giving Separately** *(pg 158)*.

Initial Setup for Donations

Before you begin to **Enter Donations** *(pg 29)*, 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 key for the **Donations** Module you will be able to open the **Donations** Module by clicking Donations from The Initial Portal of Church Windows. The software will bring you to a screen where you must then define the fundamental **Donations Settings** *(pg 297)* 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 133)* 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** *(pg 144)*, click the **Add** button either on the **Individual Givers** tab to add an individual, or on the **Families & Groups** tab to **Add a Group Giver** *(pg 148)*.

3. **Giver Numbers** *(optional)*:
   If your Church assigns Envelope of Giver numbers to its contributing parishioners, you can use the **Manage Giver Numbers** *(pg 156)* and/or **Auto Assign Giver Numbers** *(pg 168)* 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** *(pg 86)*. You can also use the **Manage Accounts** *(pg 85)* 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 Module after posting them, click the **Default Account Links** *(pg 69)* 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** *(pg 98)*. 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** *(pg 111)*. You can **Enter Pledges** *(pg 101)* as part of a Campaign or separately for each Giver. **Pledges** *(pg 98)* and donations can also be set to automatically be divided into accounts when you **Enter Donations** *(pg 29)*, this is called a **Giving Distribution** *(pg 46)*.

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** *(pg 101)* 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** *(pg 111)* 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.

Browse Donations

All the donations ever recorded in **Donations** are shown on the **Browse Donations** screen. Use the screen to look up, confirm, and make **Reversals and Corrections After Posting** *(pg 56)*. With the **Change Dates, Filter & Sort** feature in

the **Browse Donations** screen you can narrow down the donations you want to see, group them together, and change the way that they are listed to any particular order.

To access the Browse Donations screen:

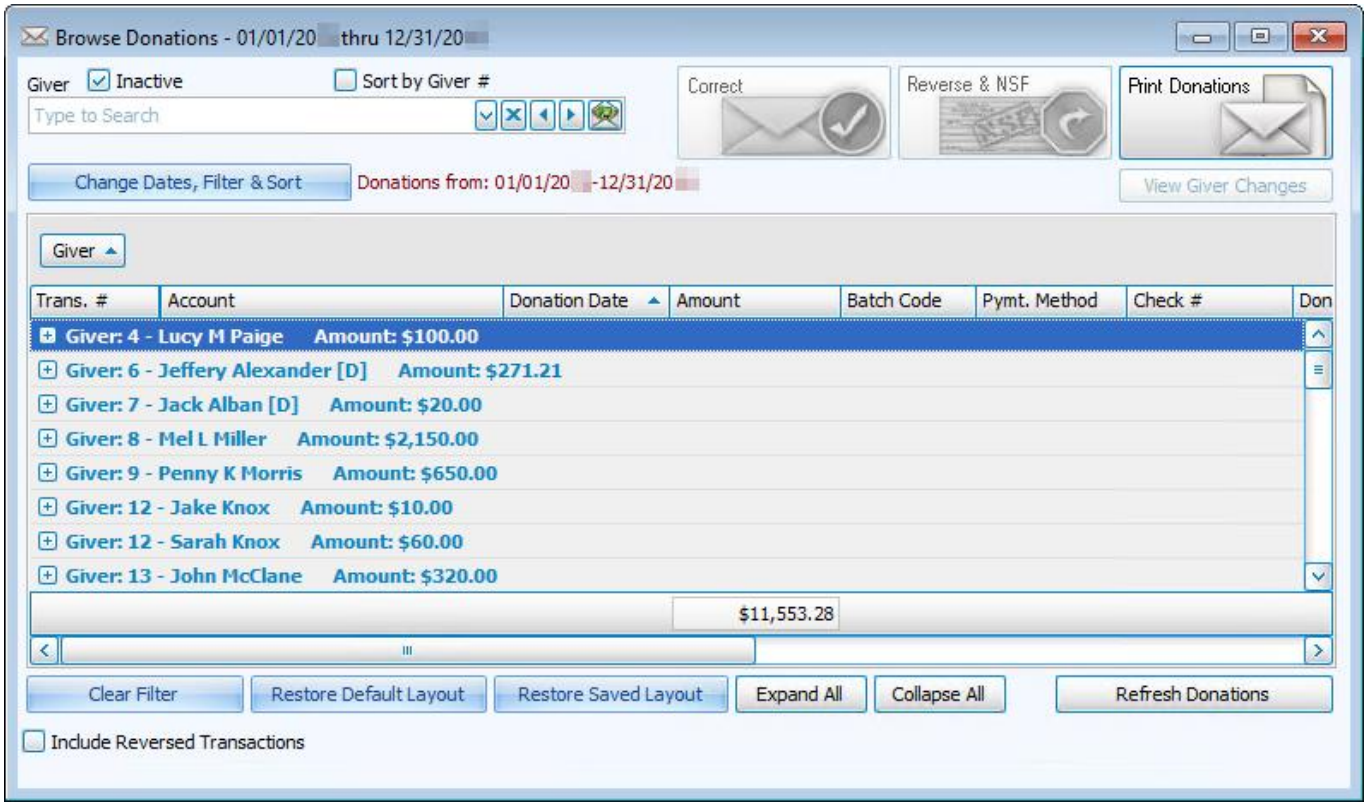
1. From The Initial Portal of Church Windows choose Donations then either:
    - Click the **Browse Donations** button in the **Quick Access Buttons** in the middle of the screen:

OR

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

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

2. The **Browse Donations** screen will appear:



3. When you first open the screen, the list will display the donations in order by transaction number.

4. If you would like to see the list organized in a different order, you can make several choices to have the software rearrange how the list appears:

Change Dates, Filter & Sort

- You can also search for specific donations, in order to print **Reports, Labels, and Statements** *(pg 191)*, **Correct a Donation** *(pg 20)*, and **Reverse a Donation** *(pg 25)*.
- Find donations by narrowing down the characteristics that the donation(s) you search possesses using the **Donation Browser Options** *(pg 15)*.
- Doing so changes the donations that appear on the **Browse Donations** screen, because of options you make to narrow down the list of donations.

Add a Donation for a Selected Giver

- You can even **Enter Donations** *(pg 29)* for Givers from **Browse Donations**.
- Use the *Giver* box at the top of the **Browse Donations** screen to select a Giver.
- Then, click the button to the right of their name.
- Clicking the button opens the screen for you to enter the donations.

Sorting the List by One or More Columns

Sorting By One Column

Click on the column by which you would like to sort the list and an upward arrow will appear. This will automatically order your list by that column in ascending order. However, click once more and you will see that the column has reordered the list in descending order, with the arrow pointing downwards .

If you need to start over or would like to sort the list differently, click the **Clear Filter and Sort** button and the list will appear as it did when you initially entered the **Browse Donations** screen.

Sorting By Multiple Columns

Click once on the column by which you would like to sort first. Then press and hold the **SHIFT** key until you select all the columns you need and the order that each one should appear. You must hold down the **SHIFT** key until you are finished choosing the columns, because otherwise you will lose the order that you want to apply to the list.

For example:
Suppose that you wanted to sort by the transaction number (**Trans #**), then by the name of the person, family or group making the donation (**Giver**) and then by the name of the account towards which the Giver made the donation (**Account Name**)

1. Click the **Trans. #** column once.
2. Press and hold the **SHIFT** key on the keyboard.
3. While holding the **SHIFT** key, click once on **Giver** and once on **Account Name**

All three columns will contain an arrow pointing upwards. Again with the **SHIFT** key pressed, click on any of the columns already chosen to change the order from ascending to descending.

You will now see an arrow pointing downwards on any of the columns you clicked on to put in descending order. Dates are often listed from latest date to oldest. When finished, let go of the **SHIFT** key and look through the list you customized. If you need to start over or would like to sort the columns in a different way, click the **Clear filter and Sort** button. The **Browse Donations** screen will then appear as it did when you first entered.

Grouping By Columns

The **Browse Donations** screen allows you to also group together your list of donations by the column or columns chosen. Click on the column heading and while holding down the mouse button, drag the column over the text that reads **Drag a Column here to group by that column…** and release the mouse button. You have the option to repeat this action for as many as three columns. If you need to start over or try another grouping, simply click **Restore Default Layout** and the list will appear as it did when you entered the **Browse Donations** screen.

Showing / Hiding Reversed Donations

By default, your screen will not show you any donations, place a ☑ checkmark in the box labeled **Include Reversed Transactions** and your reversed donations will appear in the list in red. Otherwise remove the check from the box and you will be returned to a list of donations that have never been reversed.

Scrolling the List of Donations

When a computer screen needs to show you a list of donations, it will never be able to show all the items at one time. So you use the vertical scroll bar to the right of the list and move up and down through the list of donations. Once you find the row containing the information you need, you can use the horizontal scroll bar at the bottom of the list to move from left to right to find additional information about the donations. All the while, the transaction number and the type of transaction will stay in place to allow you to better locate the specific line without losing track of which line it is.

Donation Browser Options

The **Donation Browser Options** screen is designed to help you find the specific donations that you are looking for in the **Browse Donations** *(pg 10)* screen in order to view and/or correct them. You can reach this screen by clicking the **Change Dates, Filter & Sort** button.

To access the Donation Browser Options screen:

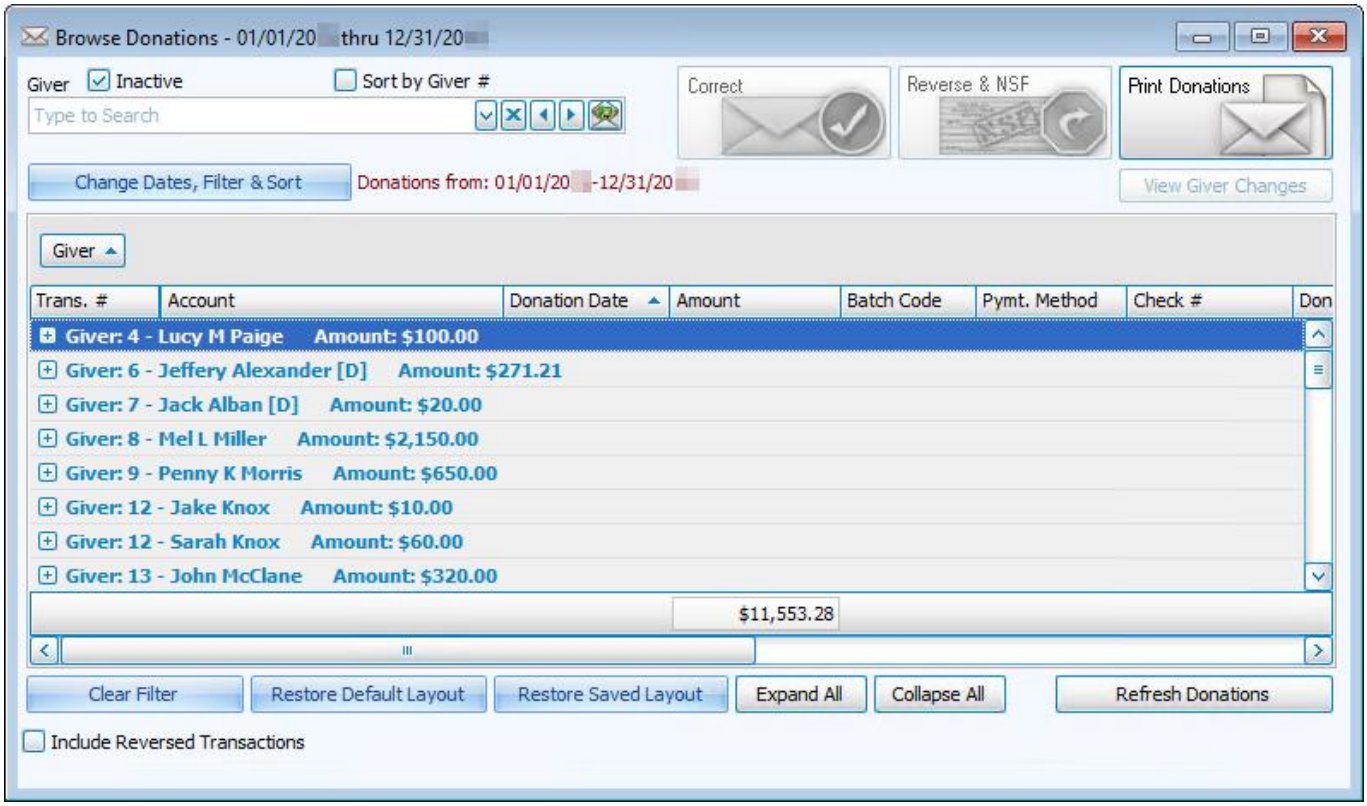
1. From The Initial Portal of Church Windows choose Donations then either:
   - Click the **Browse Donations** *(pg 10)* button in the **Quick Access Buttons** in the middle of the screen:

OR

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

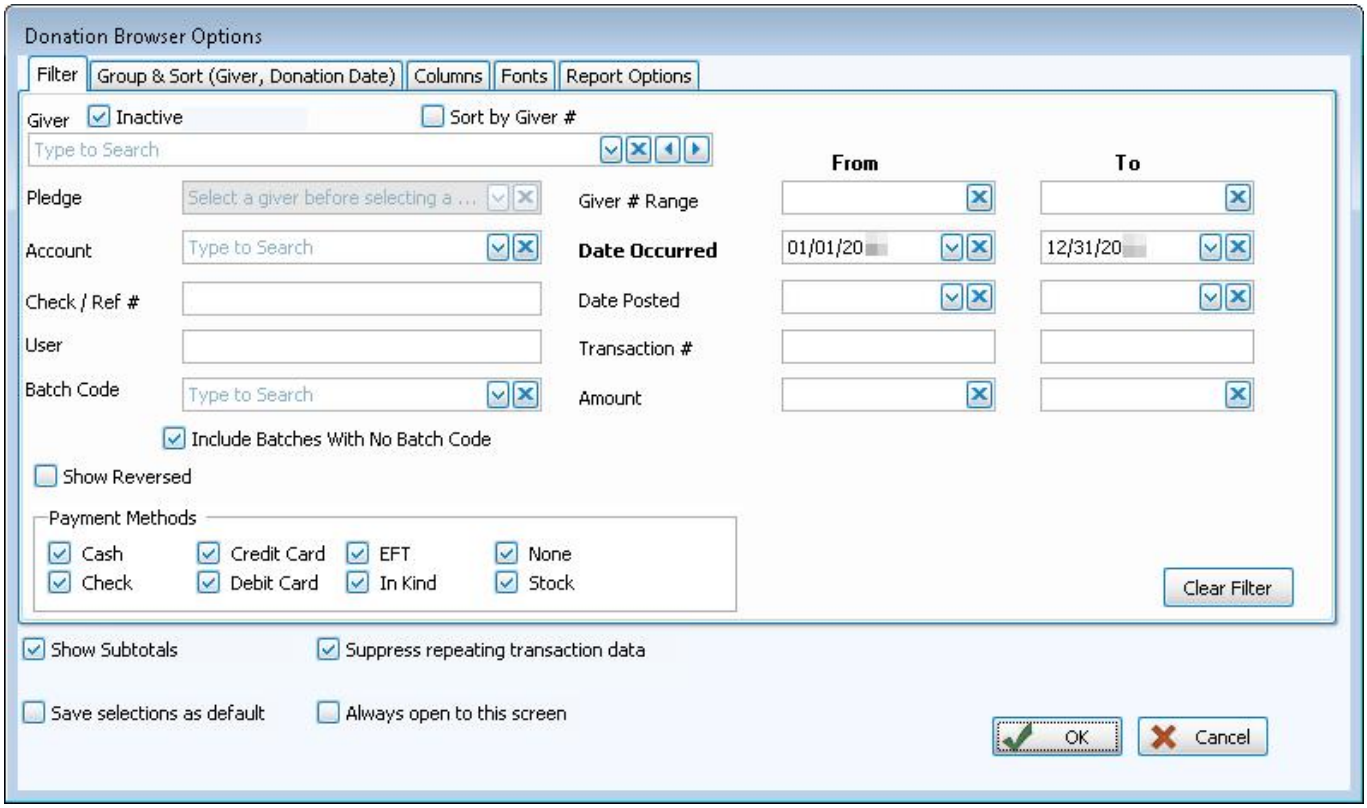
   - Then, from the menu options that appear underneath, click **Browse Donations** *(pg 10)*:

2. The **Browse Donations** *(pg 10)* screen will appear:



3. Click **Change Dates, Filter & Sort**

4. The **Donation Browser Options** screen will appear:



When looking for donation(s), enter the information that best describes the donation(s) you seek by entering them in the **Filter Tab** fields of the **Donation Browser Options** screen.

If you wish to adjust the way that this list of donations will display, you can click on any of these tabs to apply your adjustments:

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Columns Tab

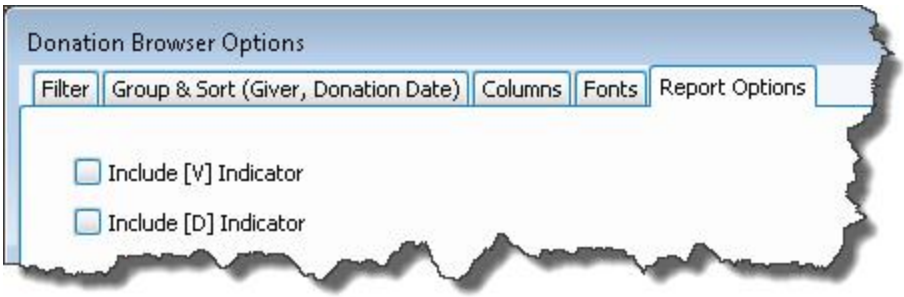
Determines the order and the appearance of the columns displayed.

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Report Options Tab

Place a ☑ checkmark to select which, if any, **Family Categories** indicator(s) you want to include (e.g. V for Visitor, D for Donor, etc.)



The **Donation Browser Options** also contains ☑ check boxes at the bottom of the screen that you can use to make the following adjustments:

Show Transaction Subtotals

If you plan to print donations from the **Browse Donations** *(pg 10)* screen, place a ☑ checkmark in this box to show a subtotal for each set of donations in the report.

Suppress Repeating Transaction Data

If you plan to print donations from the **Browse Donations** *(pg 10)* screen, place a ☑ checkmark in this box to show to make redundant information appear only once per instance.

Save Selections As Default

If you find yourself making a certain set of selections every time and would like to have the **Donation Browser Options** screen fill in the information for you next time, place a ☑ checkmark in this box.

Always Open to this Screen

Place a ☑ checkmark in this box, if when you open the **Browse Donations** *(pg 10)* screen, you want the **Donation Browser Options** screen to automatically hover over it.

When finished, click the **OK** button to display the list of donations determined by the information you entered on the **Donation Browser Options** screen.

If you would like to re-adjust the information that displays on the **Browse Donations** *(pg 10)* screen, click the **Change Dates, Filter & Sort** button again, make your changes, and click **OK**. The contents on the **Browse Donations** screen will re-adjust according to the changes you make each time.

Correct a Donation

Use the following instructions to correct an **individual donation** that has been entered into the software with errors. Correcting a donation will give you the opportunity to change any aspect of the donation that was entered incorrectly (e.g. date, Giver, amount, distribution, etc.).

Note the difference:

If you need to correct the date or code of an **entire batch** of donations, you need to Correct Posted Batches *(pg 57)* instead of the instructions below. If you need to reverse an **individual donation** without reversing the entire batch, you need to Reverse a Donation *(pg 25)* instead. If you need to reverse the **entire batch** of donations, you need to Reverse Posted Batches *(pg 61)* instead.

To Correct a Donation:

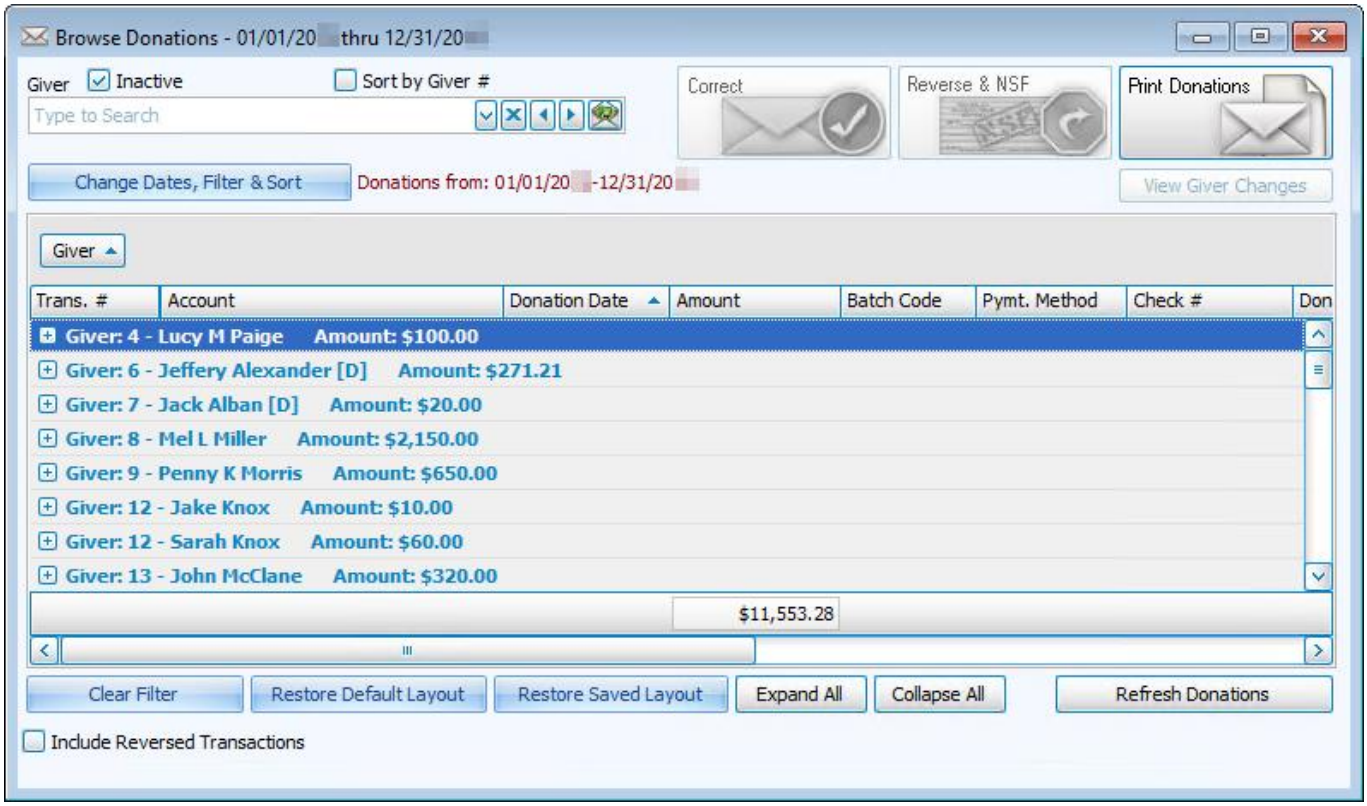
1. From The Initial Portal of Church Windows choose Donations then either:
   - Click the Browse Donations *(pg 10)* button in the **Quick Access Buttons** in the middle of the screen:

OR

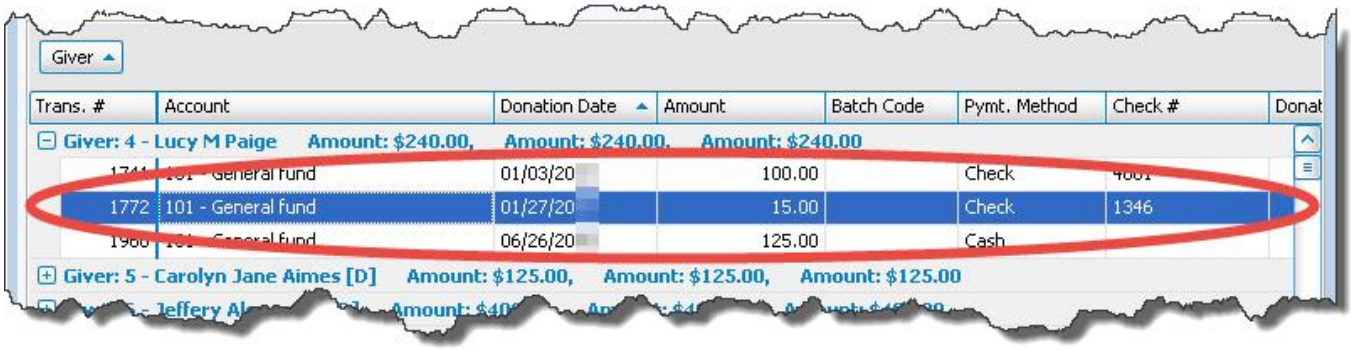
   - Click **Donations** in the **Button Bar** at the top of the screen:

- Then, from the menu options that appear underneath, click **Browse Donations** *(pg 10)*:

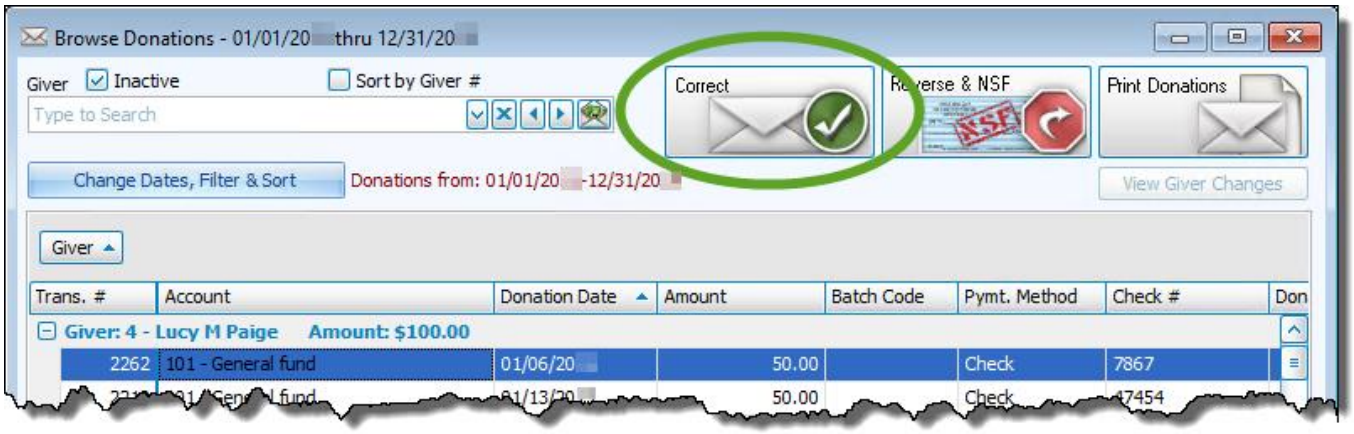
2. The **Browse Donations** *(pg 10)* screen will appear:



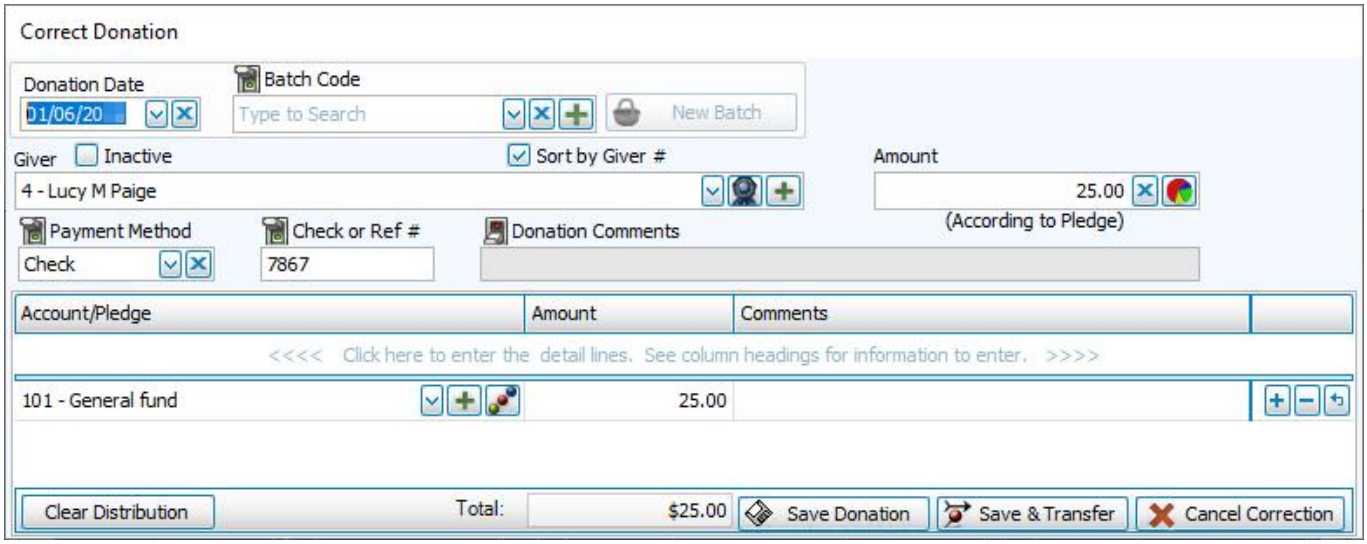
3. **Click Change Dates, Filter & Sort** *(pg 17)* or type the Giver name at the top of the screen to locate the donation that you want to correct and click the line that identifies that donation:



4. Click the **Correct** button at the top the screen:

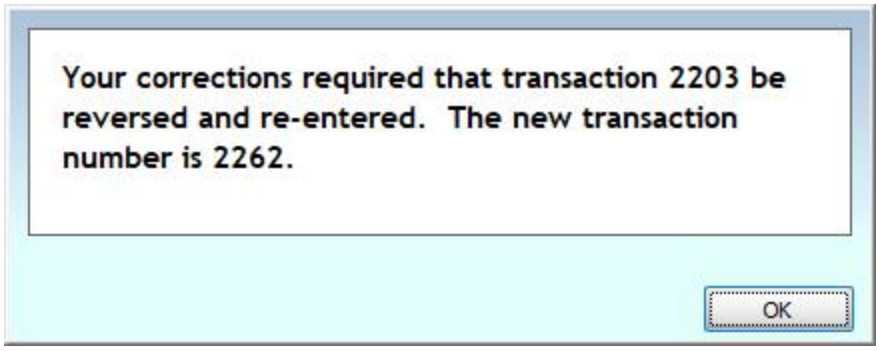


5. The **Correct Donation** screen will appear:



6. Make your corrections to the necessary fields on the **Correct Donation** screen.

7. At the bottom of the screen, click either the **Save Donation** button or **Save & Transfer** (if you use the Accounting Module) and the following message will appear:



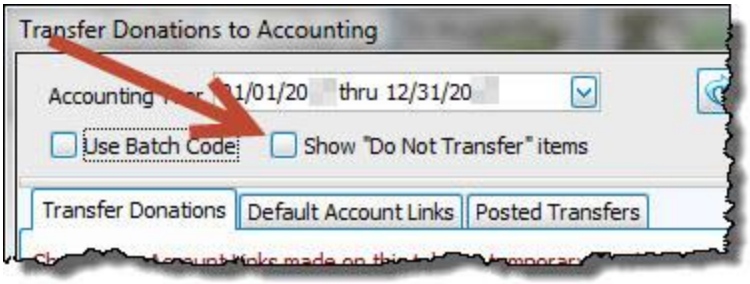
8. Click **OK** and the message will disappear. (If you clicked **Save & Transfer**, the Transfer Donations to Accounting *(pg 66)* screen will open for you to click the **Post** button to transfer the correction to Accounting.)

9. Repeat **Steps 4-8** if you need to correct additional donations.

Once finished, if you would like to view your transaction corrections, make sure that you take note of the transaction numbers. You can then look up the transactions by **Transaction #** on the Browse Donations *(pg 10)* screen.

Important!

If you change only change the giving account and NOT the amount for either a single donation or a whole batch that was previously transferred to **Accounting**, it will not automatically show up in Transfer Donations to Accounting *(pg 66)*. To see any of these corrections where the amount has not changed, you will need to ☑ check the "**Show 'Do Not Transfer' items**" box on the Transfer Donations to Accounting *(pg 66)* screen after you save your changes:



Reverse a Donation

Use the following instructions to reverse a **single donation** that has been entered into the software. Reversing a donation will essentially delete the donation you selected.

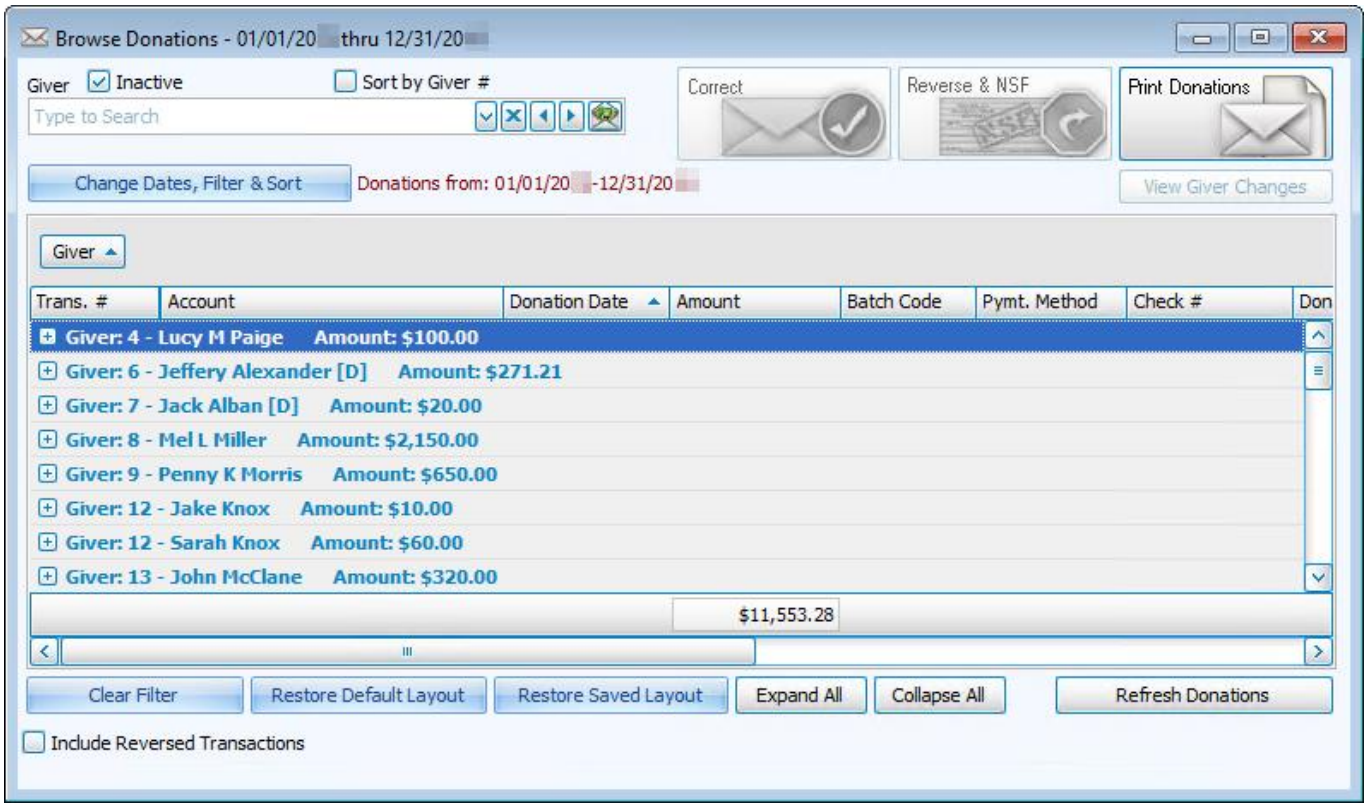
Note the difference:

If you need to reverse the **entire batch** of donations, be sure to follow the instructions in Reverse Posted Batches *(pg 61)* instead of the instructions below. If you need to alter or correct **individual donations** in the batch, you need to Correct a Donation *(pg 20)* instead. If you need to correct the date or code of an **entire batch** of donations, you need to Correct Posted Batches *(pg 57)* instead.

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

2. Click the **Browse** button from the menu options underneath:

3. This opens the **Browse Donations** *(pg 10)* screen:

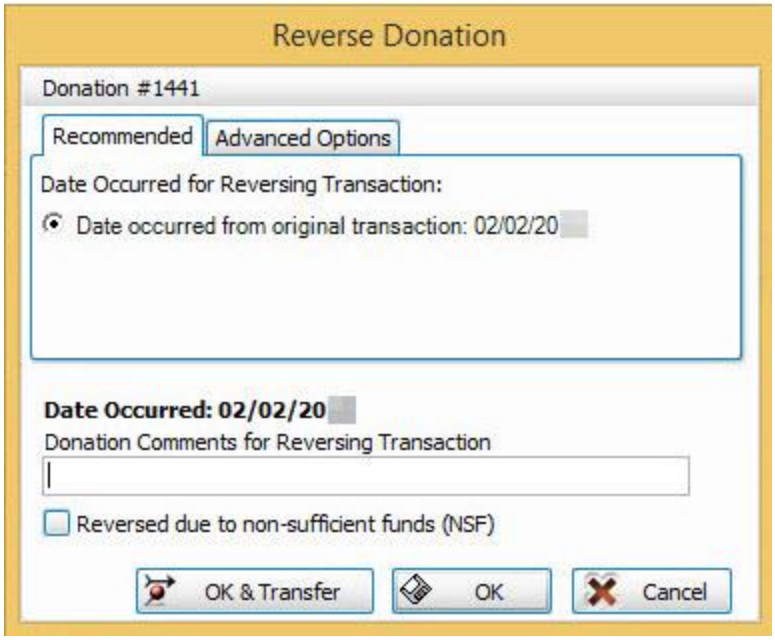


4. Use the **Donation Browser Options** *(pg 15)* to locate the donation that you want to reverse and click the line that identifies that donation.

5. Click the **Reverse/NSF** button in the top right area of the screen:

> **Note:**
>
> *Reversals are used in place of deletions, this allows an iron-clad audit history to be maintained. Reversing a transaction is* ***permanent****;* ***it is not possible to reverse a reversal****.*

6. The **Reverse Donation** screen appears and gives you the following options:



Recommended tab:

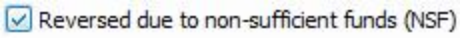
- **Date occurred from original transaction:** Click to mark the radio button next to this option if you would like the reversal transaction to contain the same date as the donation originally posted. This is the recommended method as to not affect earlier or later balances and/or bank reconciliation amounts.

Advanced Options tab: Clicking on this tab will let you choose any other date for the reversal to take affect.

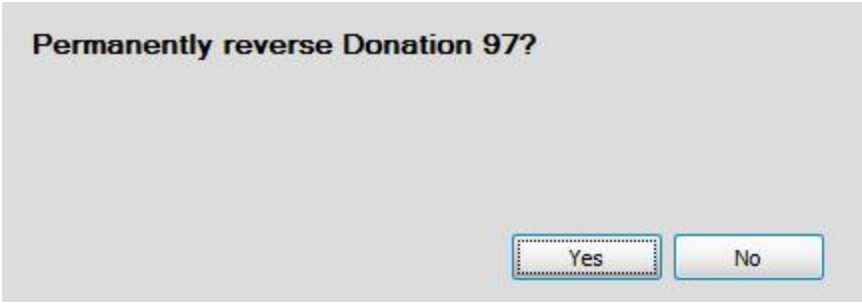
- **Today:** Click to mark the radio button next to this option if you would like a reversal transaction for the reversed donation to contain today's date.
- **Other date:** Click to mark the radio button next to this option if you would like a reversal transaction for the reversed donation to contain a different date. Then, click the dropdown button and select the desired date.

7. In the **Donation Comments for Reversing Transaction** field, enter a brief description for future reference into this field explaining why you are getting rid of this donation.

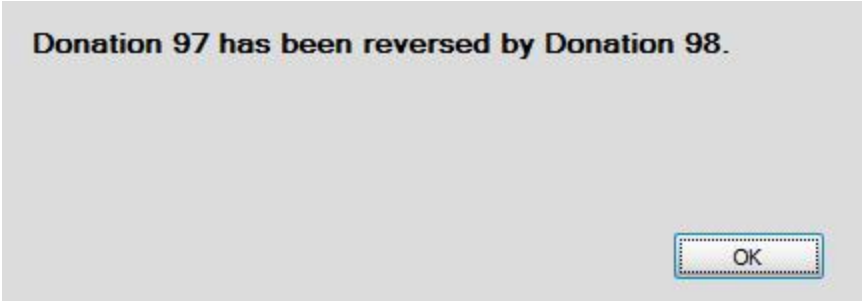
8. If you are reversing the donation due to NSF reasons, place a checkmark in the **Reversed due to non-sufficient funds (NSF)** box.



9. Click the **OK** button and a message will prompt you to verify the permanent reversal of the donation.



10. Click **Yes** and a message will show you a confirmation that the donation was reversed.



11. Click **OK** and the message will disappear.
12. Repeat Steps 4-11 if you need to reverse additional donations.

If afterward, you would like to view your transaction reversals, make sure that you take note of the transaction numbers. You can then look up the transactions by **Transaction #** on the **Browse Donations** *(pg 10)* screen.

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:

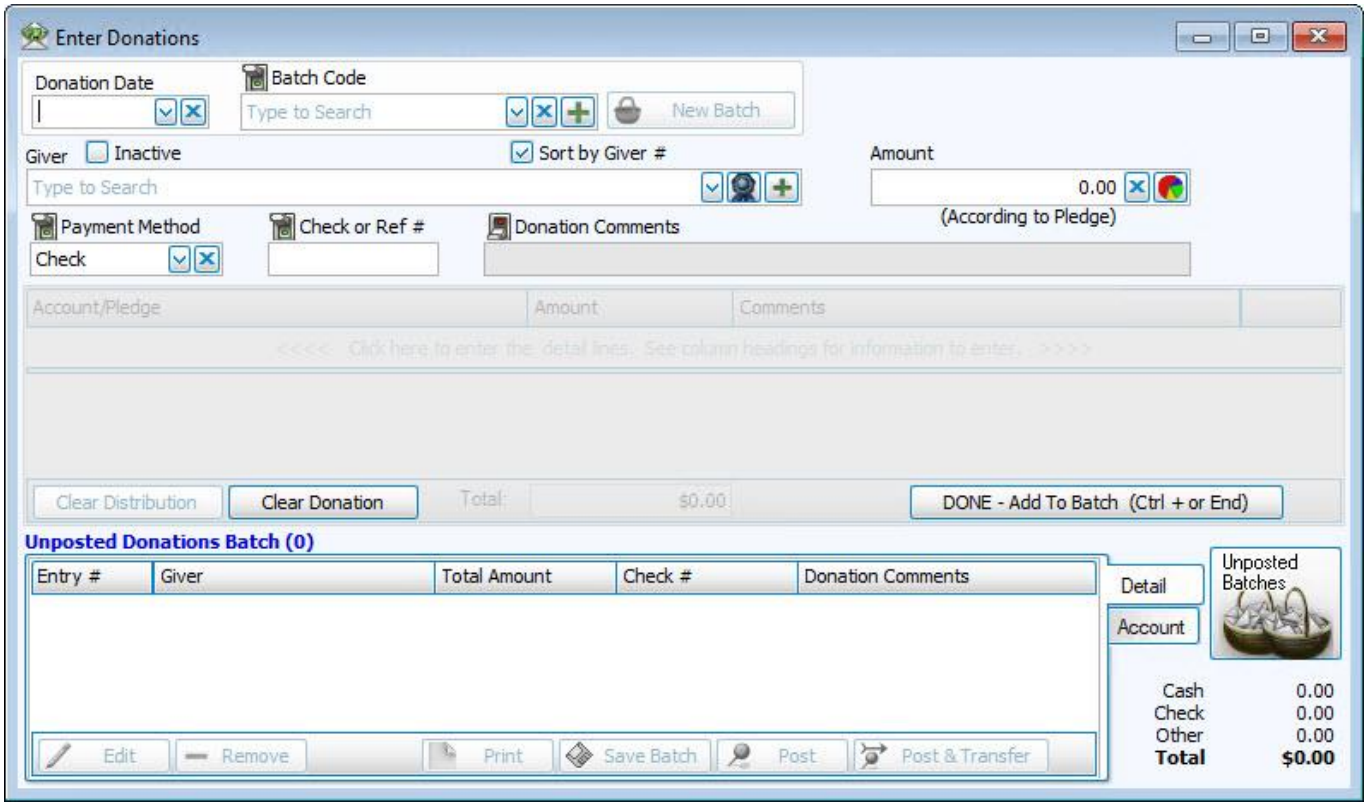
1. From The Initial Portal of Church Windows choose Donations then either:
   - Click the **Enter Donations** button in the **Quick Access Buttons** in the middle of the screen:

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:

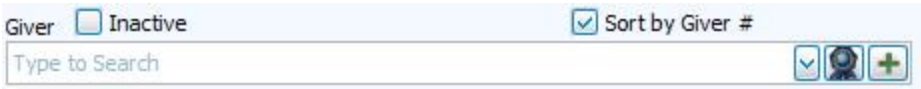
*The **Enter Donations** screen provides you with the option of* ***Locking Fields*** *(pg 44) to make a selection from a field and lock it in place or skip a field you do not use. You might find this most useful if you use the **ENTER** and **TAB** keys to move from one field to the next. To enable 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** *(pg 53)*
   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:

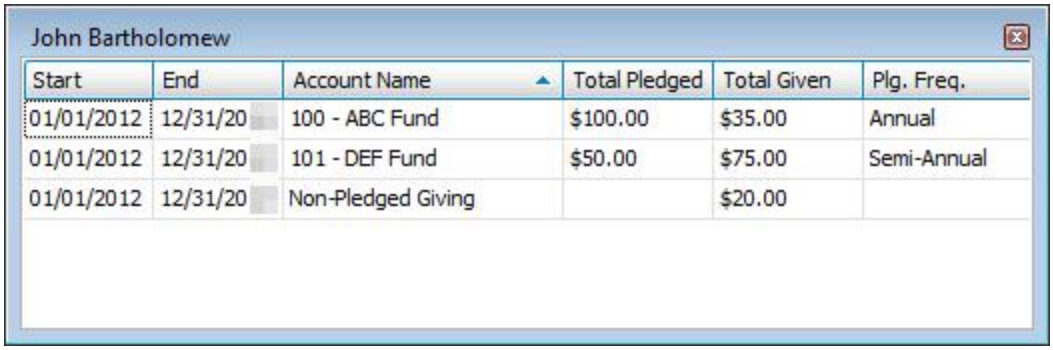
> ***Notes:***
>
> *If you do not see a **Batch Code** in the list, click the **Add** button to add a new **Batch Code**. Adding new **Batch Codes** (pg 53) will then allow you to apply the **Batch Code** to the current batch. Also, this new **Batch Code** would be available for you to apply to any future batches that would need it. Additionally, this is one of the **Locking Fields** (pg 44), 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.



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.

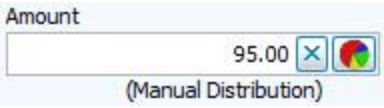
> ***Note on Plg. Freq.***: *In the image above, the **Total Pledged** for the DEF Fund is listed at $50.00. The **Plg. Freq.** shows Semi-Annual. This means that the **Amount Per Frequency** for this person to the DEF Fund is $25.00 every 6 months (Semi-Annual), as recorded in the* ***Enter Pledges*** *(pg 101)* *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*** *(pg 144)*.

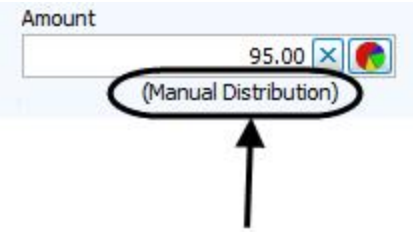
6. **Amount**

   Enter the entire amount donated by the Giver.



7. **Giving Distribution** *(pg 46)*

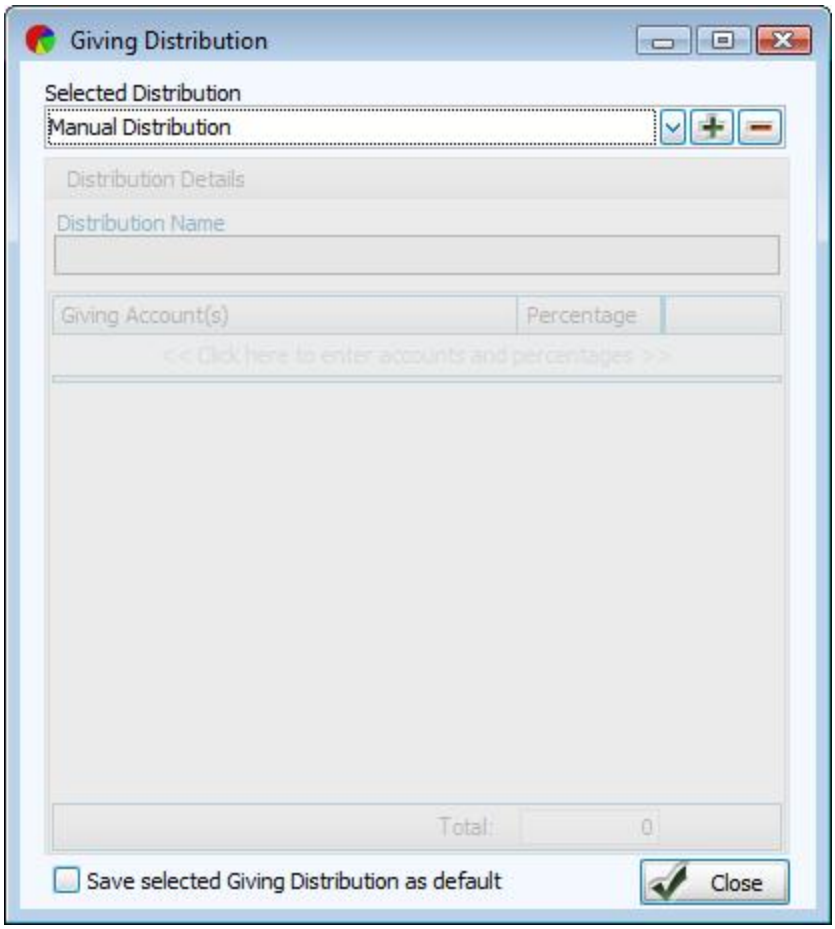
   Take a look at the item in parenthesis below the amount you entered.



The item within the parenthesis, called **Giving Distribution** *(pg 46)*, 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."

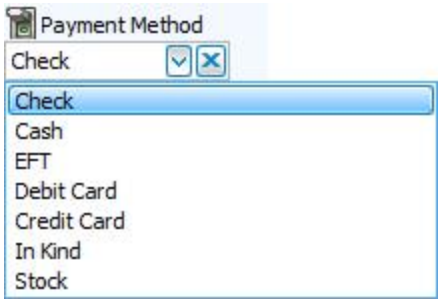
> **Note:**
>
> *The amount that goes in this box is the total of all that the Giver donates for all the purposes put together for the specified date. In other words, a Giver might have donated $45 for General Giving and $50 for the Building Fund. In this box, you would enter $95. How that is separated is handled by the* ***Giving Distribution*** *(pg 46).*

If you need to change the way the money is being distributed, click the pie chart button to open the **Giving Distribution** *(pg 46)* screen:



For example, if your Church has a way of making a specific **Giving Distribution** *(pg 46)* 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** *(pg 44)*, 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** *(pg 44)*.

11. **Account / Pledge**

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

If you need to **Add an Account** *(pg 86)*, 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.

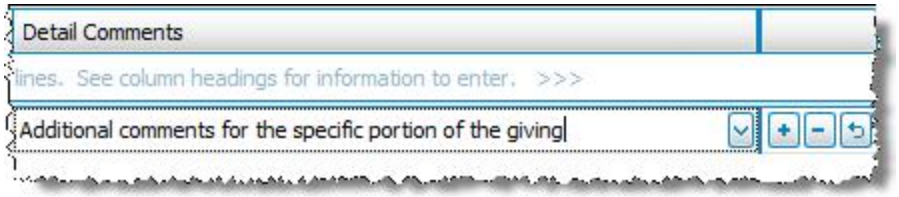
> ***Note:***
>
> *Also, if you would like to see certain accounts show up towards the top of the list that appears when clicking the dropdown button, click the button. You can reorder the way the accounts appear in the list from the* ***Order Giving Accounts*** *(pg 95) screen that appears.*

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**

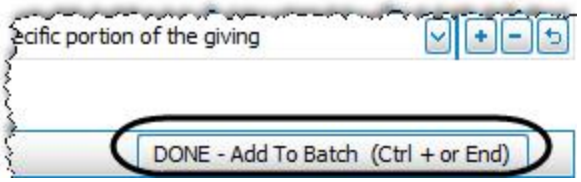
    In the box, enter any optional additional information that further describes this specific portion of the donation:



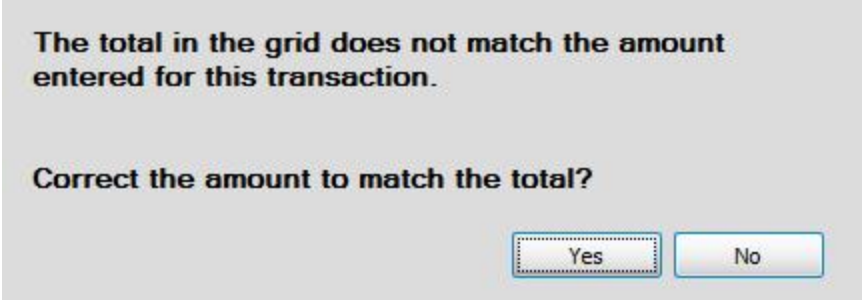
14. If you would like to add multiple entries that altogether make up the details of the one transaction that you are currently entering, press the **Add** button and repeat **Steps 12 through 14** until you are finished completing the details of the transaction. Otherwise, you may proceed to the next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

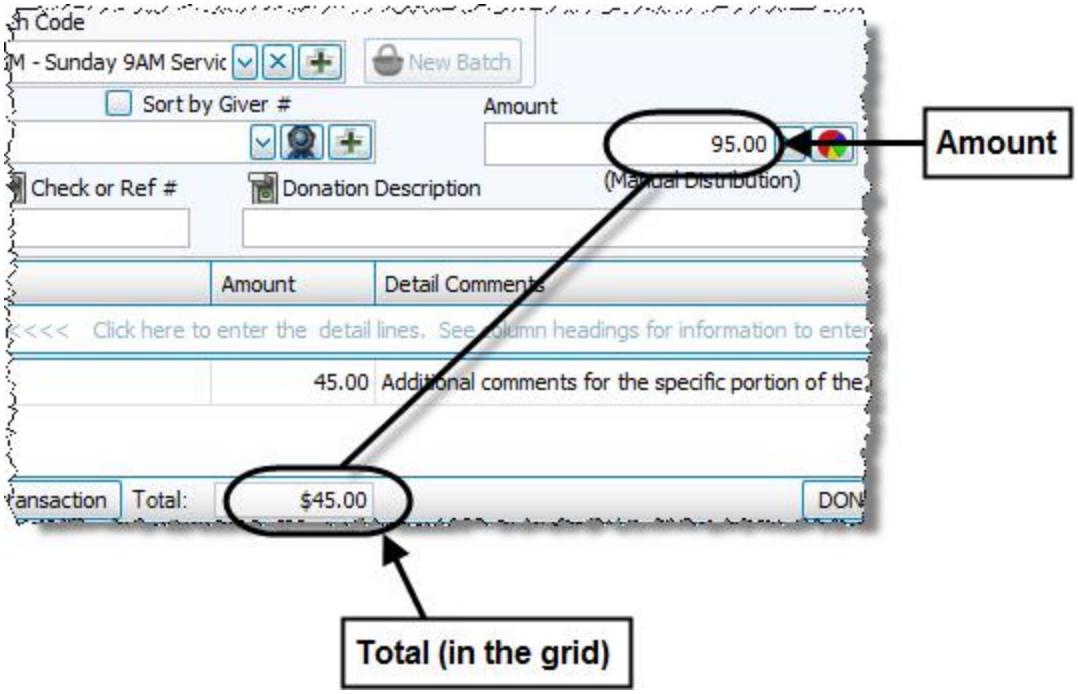
15. When you have added all of the details for the specific Giver's donation, click the **Done — Add To Batch (CTRL + or End)** button (or hit either the **CTRL** and **+** keys, or the **End** key on the keyboard):



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:

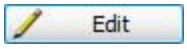
*Sometimes the **Total** is more than the **Amount**, or vice versa. It depends on the information from which you are entering the giving details. If you find that there is a discrepancy in the two dollar amounts, you must discuss it with whoever has given you the information so that you can enter the 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**.*

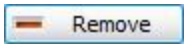
17. **Unposted Donations Batch**
    When the transaction is successfully added to the batch it will appear in the list at the bottom of the screen.

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.

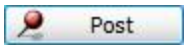


To remove any transactions form the **Unposted Donations Batch** area of the screen, first click on the transaction. Then, press **Remove**.

> **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 *(pg 194)*) before saving or posting it. Click **Print** to view a Print Preview 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 *(pg 42)* until you are ready to finish and post the batch.

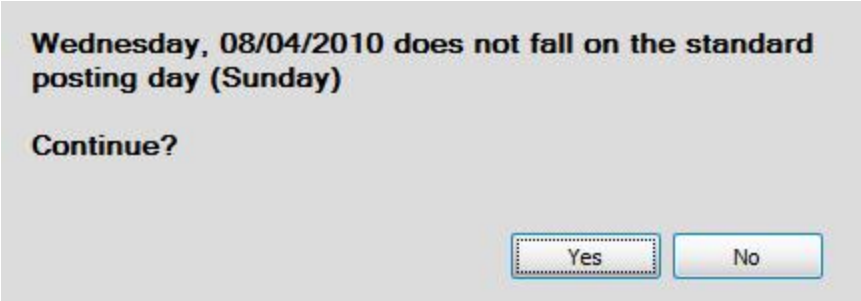


If you would like to post the batch, press **Post**. The donations that you have entered will be recorded as donations that have been entered and will appear in Browse Donations *(pg 10)*.

If you would like to Transfer Donations to Accounting *(pg 66)* after you finish posting the batch in the **Donations** Module, click **Post & Transfer**.

Note:

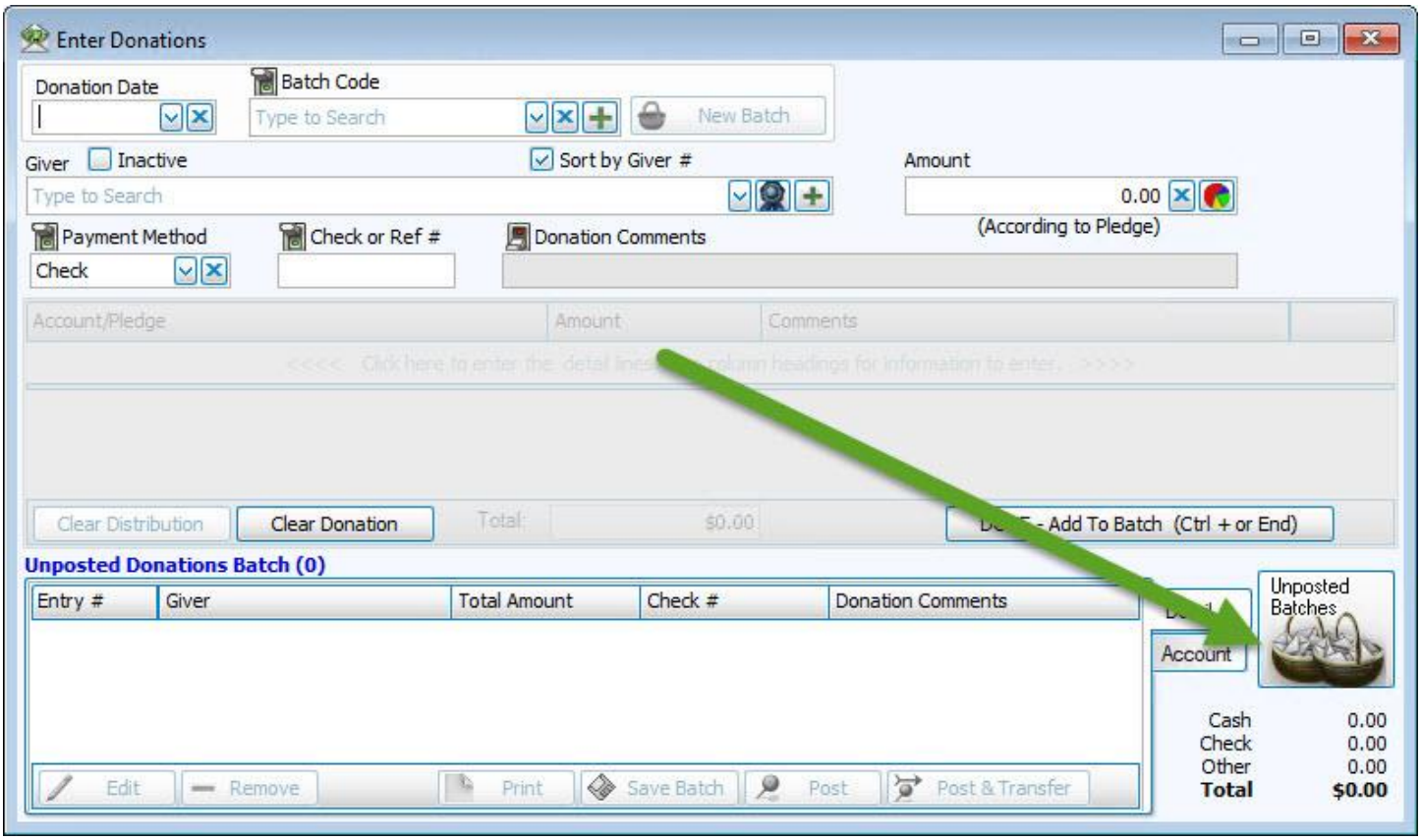
A message might appear on the screen to warn you if the day on which you are posting the batch does not fall on the standard posting day:



*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 *(pg 297)*.

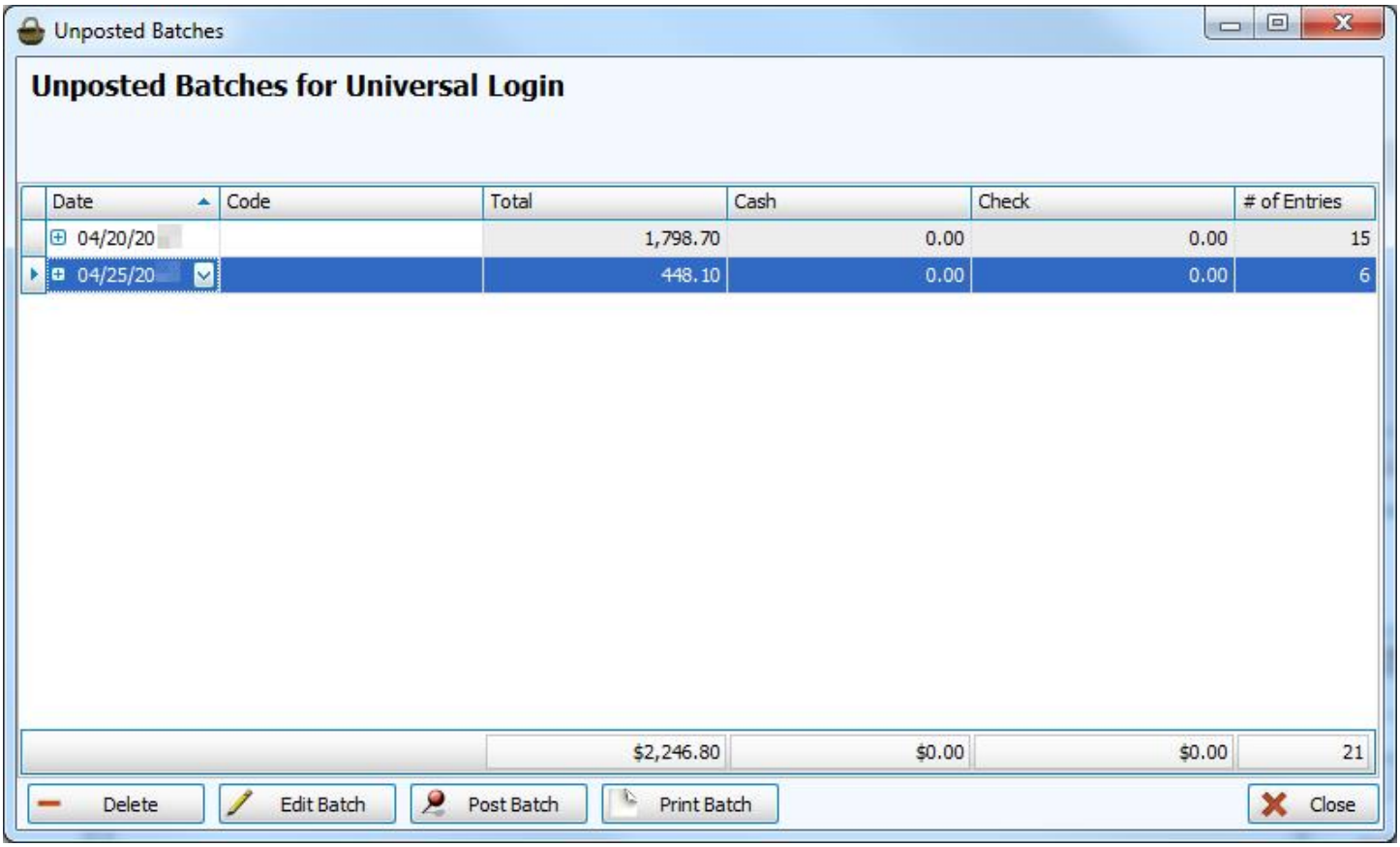
Unposted Batches

A batch of donations being entered can always be saved to be worked on at a later time. Such batches in Church Windows **Donations** are referred to as unposted batches, which you can find by clicking the **Unposted Batches** button on the Enter Donations *(pg 29)* screen:



The Unposted Batches screen is separated into the following columns:

- **Date:** The date for which the donations in the batch was made.
- **Code:** The batch code used for the specific batch.
- **Total:** The dollar amount of all the donations entries in the batch.
- **Cash:** The portion of the Total that represents donation entries in the batch made in cash.
- **Check:** The portion of the Total that represents donation entries in the batch made in check.
- **# of Entries:** The number of donation entries in the batch.



The buttons across the bottom of the screen allow you to perform the following tasks:

- Select any desired batch you wish to delete and click the **Delete Batch** button.
- To make changes to the entries in the batch, select the desired batch and click **Edit Batch**. The batch with all its entries in the batch will reappear at the bottom portion of the Enter Donations *(pg 29)* screen, labeled **Unposted Donations Batch**. From there you can choose any of the entries and edit the information as needed.
- If you decide that the batch information is correct and would like to post it, click to select the desired batch and click the **Post Batch** button.
- If you need to print the unposted batch, click to select the desired batch and click **Print Batch**.

Click the **Close** button when you are finished using the screen.

Locking Fields

Some fields in the Enter Donations *(pg 29)* screen contain the same information for every donation that you enter into the batch.

For example, all entries in each batch must have either the same **Batch Codes** *(pg 53)* or no Batch Code at all.

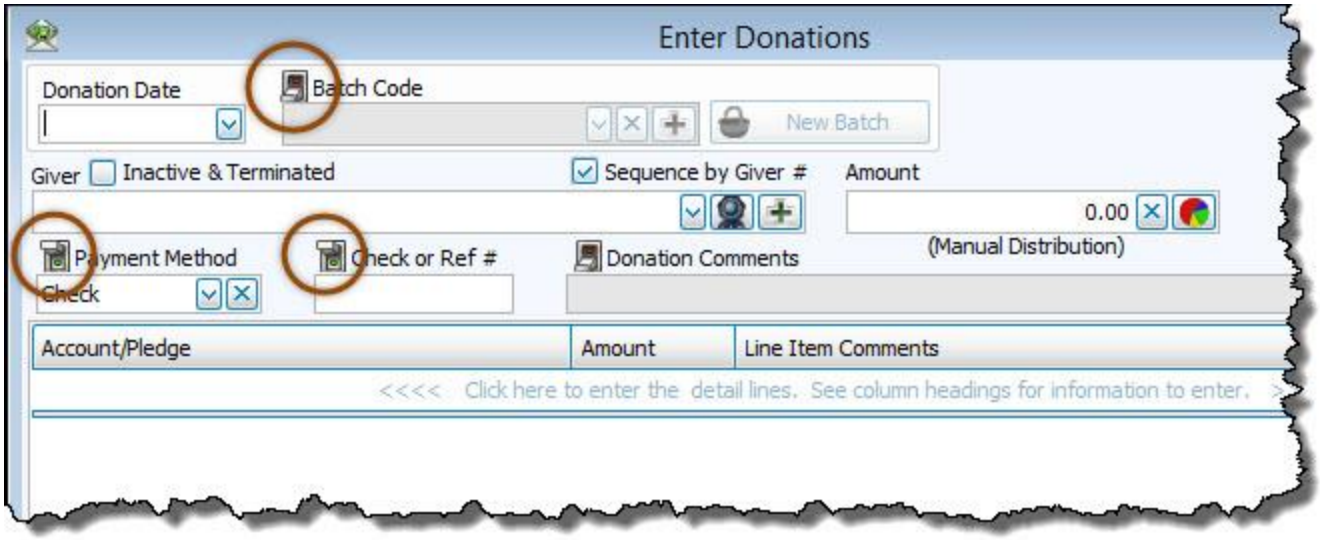
So instead of entering the same batch code every time that you enter a donation into the batch, you can lock the information of a field in place. Locking the information of a field in place gives you the ability to refrain from entering the same information into a field and move on to the next field.

Note:

*You might find this helpful if you are accustomed to hitting the **TAB** and **ENTER** keys, when you enter donations into the batch. By locking a field in place, you can hit the **TAB** or **ENTER** keys and completely skip over the field to move on to the next.*

The following directions will show you how to lock a field in place:

1. Make the desired selection from the desired field.
2. Locate the **ON** and **OFF** light switch buttons:



3. Click the light switch button located above the field. The background of the field will turn gray in color while the field displays the information you entered.
4. The light switch button will now show as being in the **OFF** position and the information in the field will remain temporarily locked in place.
5. If you need to have a field remain unlocked, so that you can change the information it contains, click the **OFF** switch again, so that it changes to the **ON** position. The background of the field will turn white and you will be free to make a desired selection.

Skipping More Than One Field at One Time

In addition, you can lock more than one field at one time. And unlike **Batch Codes** *(pg 53)*, they do not demand that the whole batch is to contain the same selection from the field.

> For example, if the same batch contains donations given in cash and in checks, you can alternately lock and unlock the **Payment Method** fields and **Check or Ref #** fields. While the Batch Code will remain the same at all times, you can lock the **Cash** payment method in place and lock the blank **Check or Ref #** field (assuming that your cash transactions do not have one). This way, you can enter all your cash donations at once. When finished, you can lock the **Check** payment method in place and unlock the **Check or Ref #** field (so that you can enter the number for each check).

Above all, these are just examples intended to give you an idea of how more than one field can be locked at one time.

Giving Distribution

As you **Enter Donations** *(pg 29)*, the software gives you the option to have donations automatically distributed among accounts by pledge or by other means that you are in control to set in the software. You also have the option of distributing the amount of money given manually across the accounts to which the donations are being given.

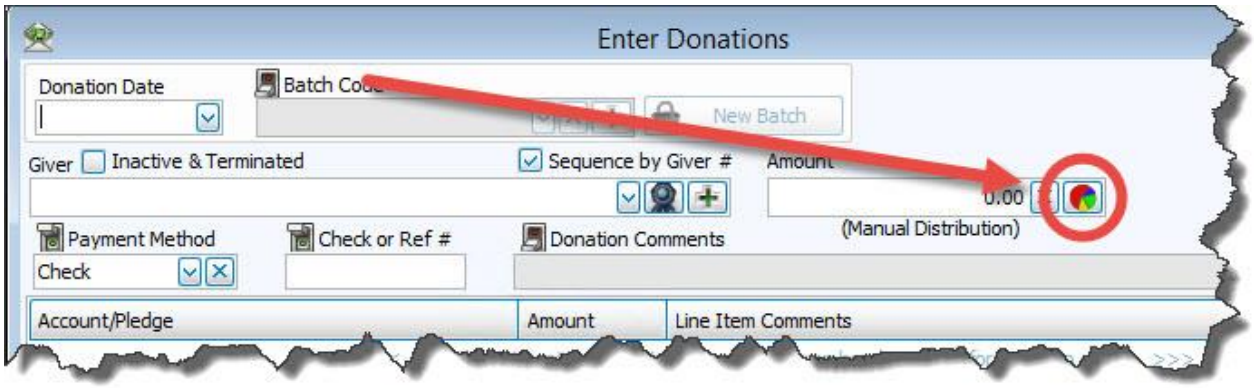
To access the Giving Distribution screen:

- From The Initial Portal of Church Windows choose Donations.
- Click **Donations** in the **Button Bar** at the top of the screen

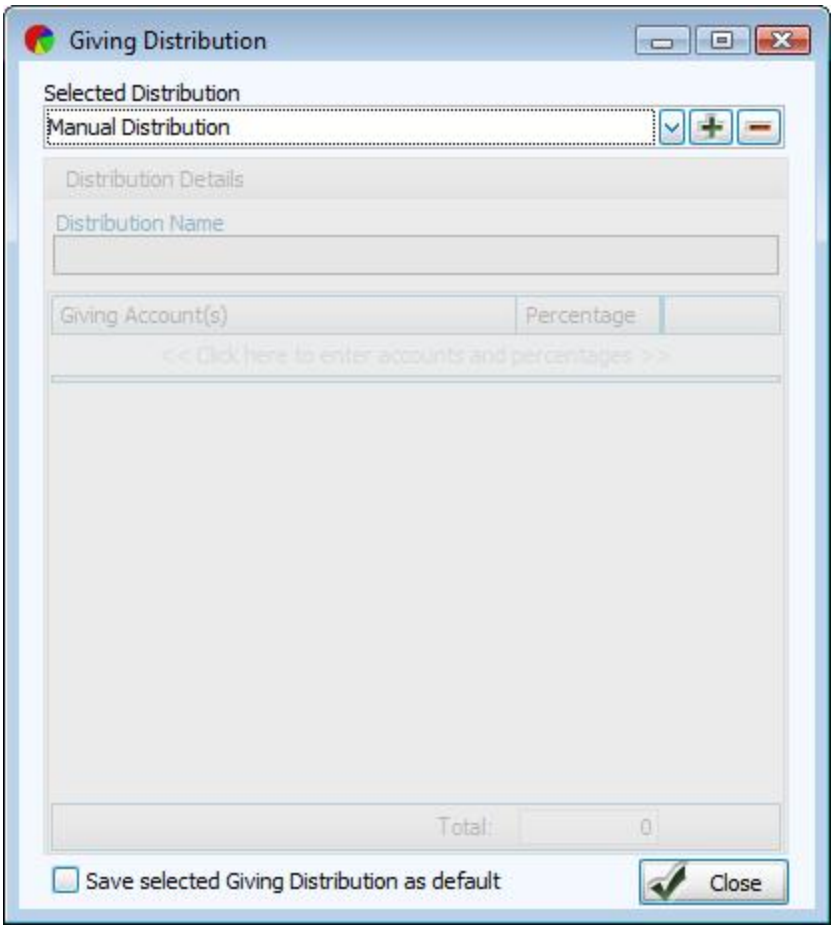
- Then either:
  1. Click the **Giving Distribution** button:

OR

  2. Open the Enter Donations *(pg 29)* screen and click the pie graph button next to the **Amount** field:

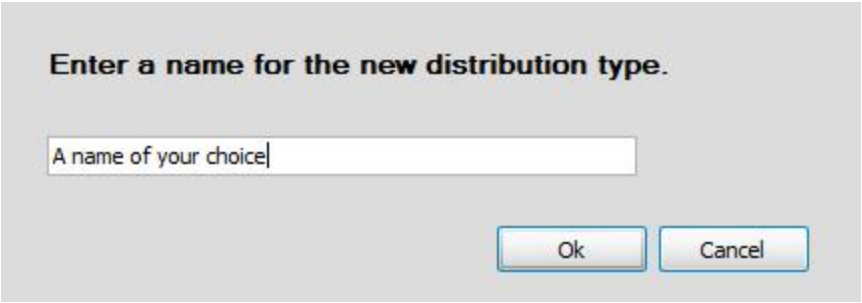


- From the **Giving Distribution** screen you can do one or more of the following tasks:

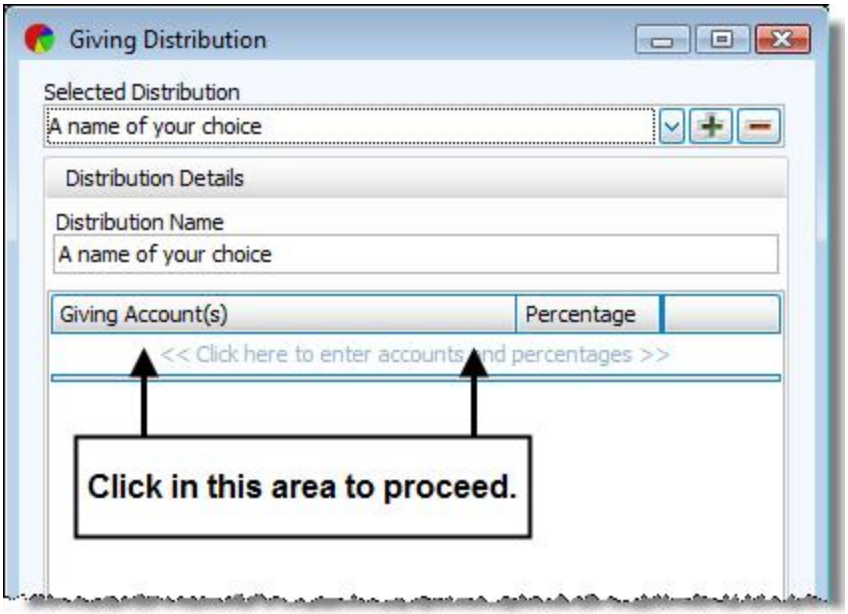


Setting up a Custom Giving Distribution

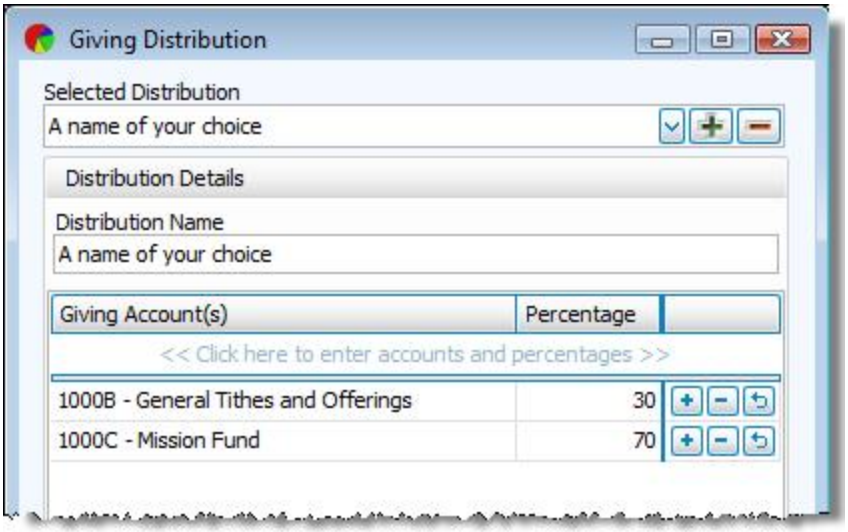
1. In the **Giving Distribution** screen, click the **Add** button and enter a name that you would like to use to represent your custom distribution.



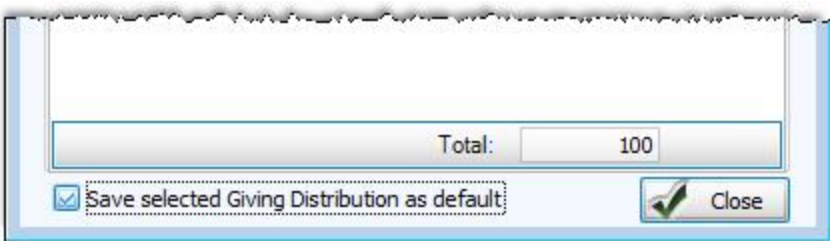
2. Press **OK** and the **Giving Distribution** screen will make space available for you to enter the accounts and the percentage portions.



3. Enter the desired accounts and the percentage portions.



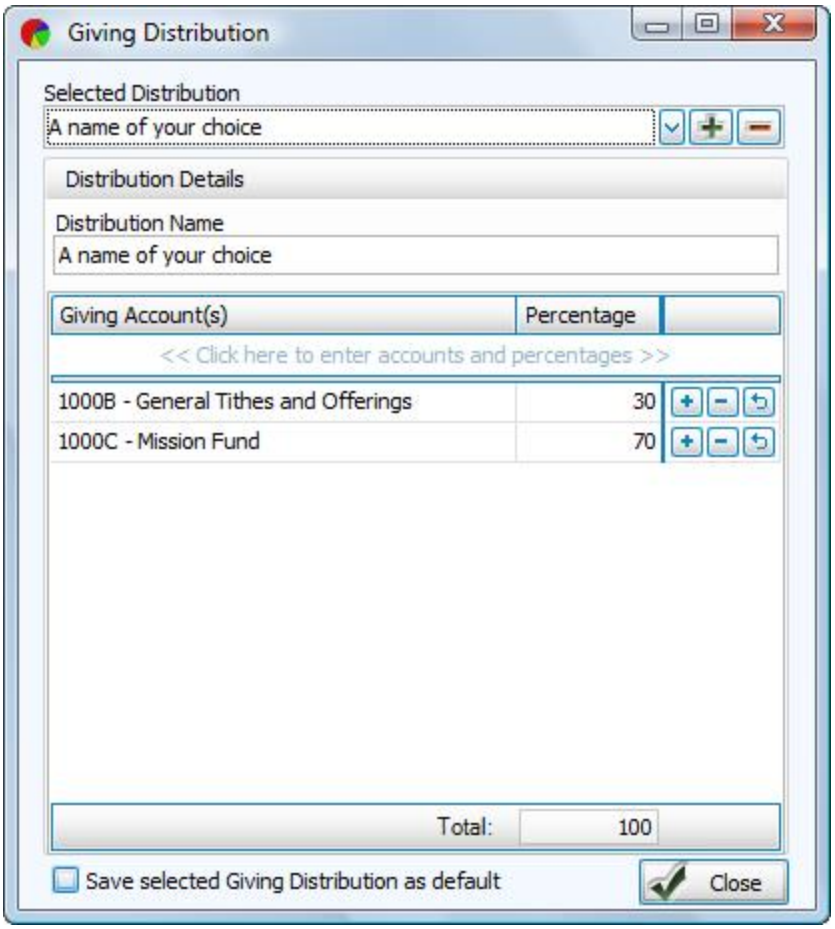
4. If you want these custom settings to be the ones that you primarily use to distribute the donations amount when entering donations, place a ☑ checkmark in the **Save selected Giving Distribution as default** box.



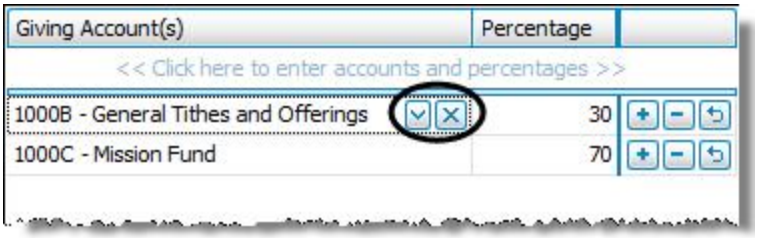
You can also add new lines to the distribution by clicking the **<<<< Click here to enter the detail lines. >>>>** row, or pressing any available **Add** button. To discard changes, click the **Undo** button. You can also remove as many lines as you wish by clicking the **Delete** button at the end of the line you wish to remove. When finished, click **Close** to exit the **Giving Distribution** screen.

Changing the Giving Distribution Settings

1. From the **Selected Distribution** box, click the dropdown button and choose the name whose settings you want to change.



2. If you need to change the giving account, click the account and a dropdown button and a clear button will appear on the line you clicked.



Click the dropdown button to select a different account.

3. If you need to change the percentage, click the number in the Percentage box and replace it with the desired number.

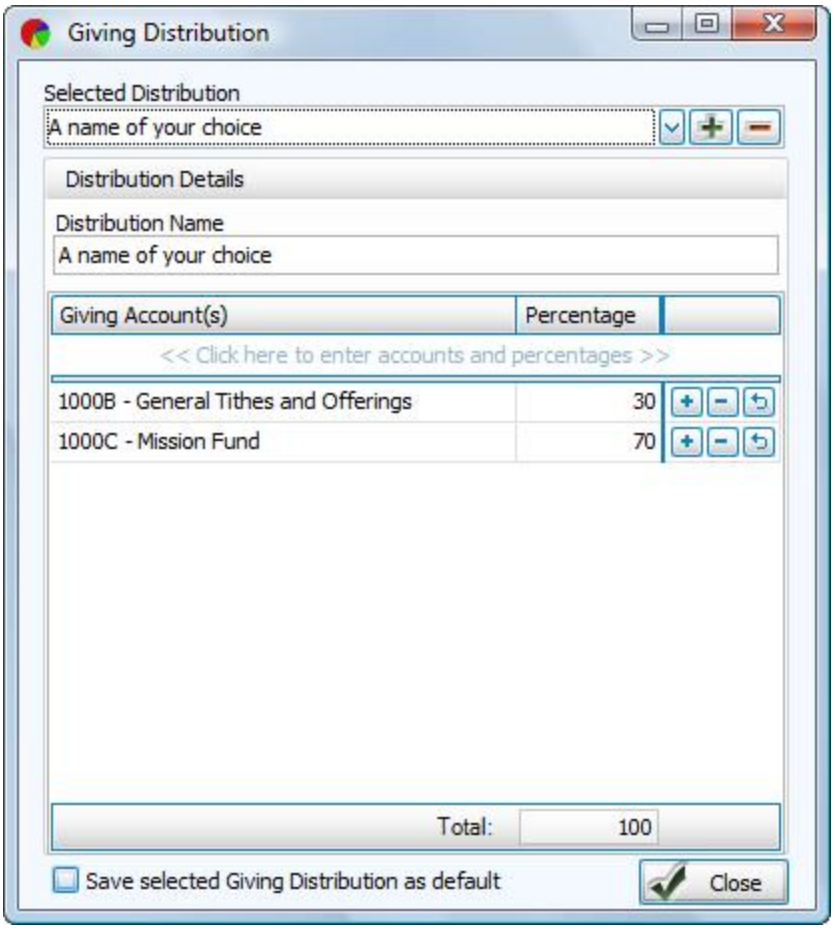
You can also add new lines to the distribution by clicking the **<<<< Click here to enter the detail lines. >>>>** row, or pressing any available **Add** button. To discard changes, click the **Undo** button. You can

also remove as many lines as you wish by clicking the **Delete** button at the end of the line you wish to remove. When finished, click **Close** to exit the **Giving Distribution** screen.

> **Note:**
>
> *If you want these custom settings to be the ones that you primarily use to distribute the donations amount when entering donations, place a checkmark in the **Save selected Giving Distribution as default** box.*

Removing Giving Distribution Settings

1. From the **Selected Distribution** box, click the dropdown button and choose the name and settings that you want to remove.



2. Press the **Delete** button and the name and its settings automatically disappear.

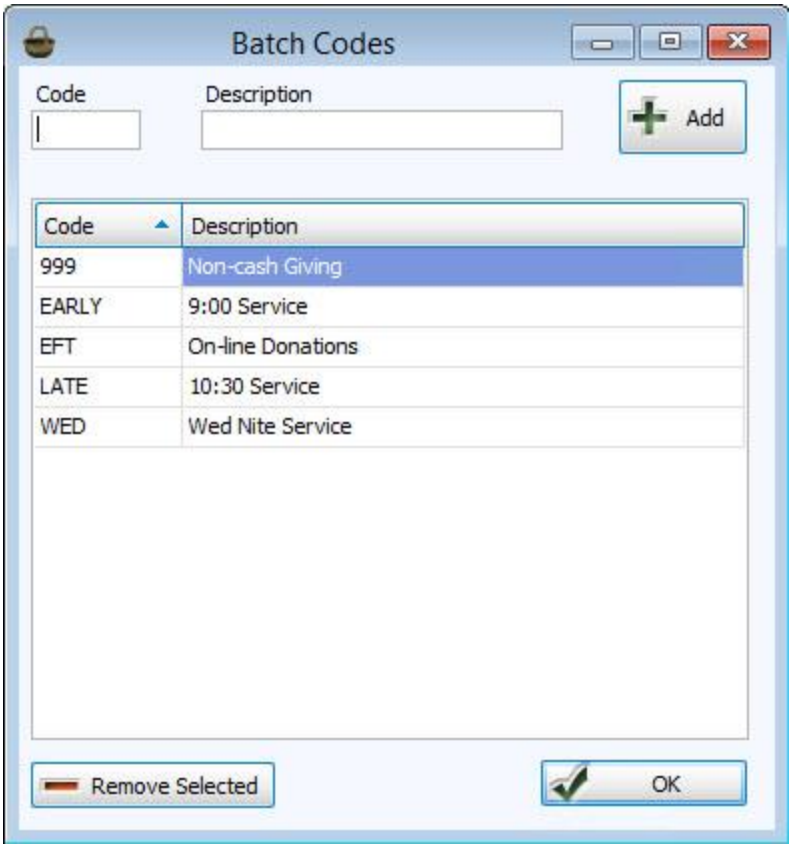
Batch Codes

Each time you **Enter Donations** *(pg 29)*, you have the option to apply a Batch Code which is a label that identifies the overall purpose of the batch of donations. Each batch code contains a description that further explains the purpose for that batch code.

Use the **Batch Codes** screen to add, change, or remove the codes used in the software.

To access the Batch Codes screen:

1. Click **Donations** in the **Button Bar** at the top of the screen
2. Click the **Batch Codes** button:



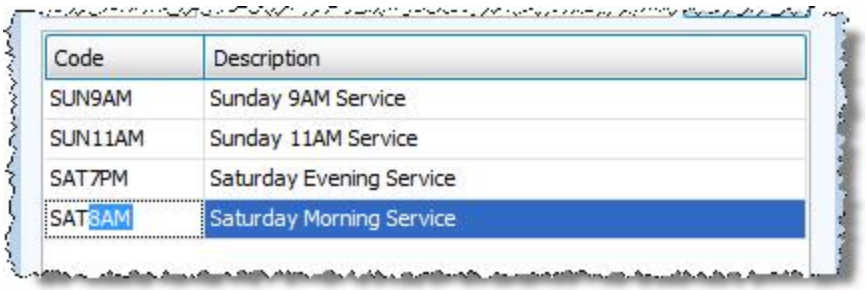
From this screen you can do one or more of the following:

Add a New Batch Code

Make a choice of what to put for a code and description. Then, press **Add**. The new code will be added to the list of available **Batch Codes**. When you are finished, click the **OK** button at the bottom of the screen.

Change an Existing Batch Code

Click the area that you want to change. For instance, if you want to change a code of a certain item in the list, click inside the Code field.



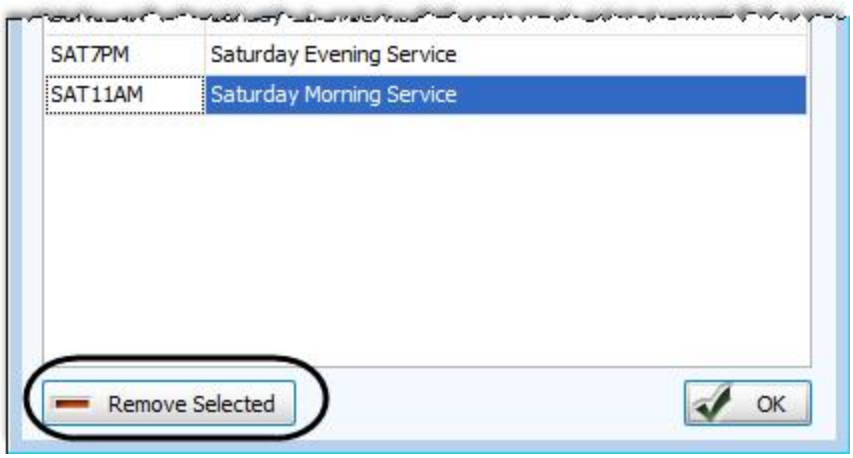
Make the desired changes and press the **ENTER** key on the keyboard when finished. The changes will show on all past and future transactions.

When you are finished, click the **OK** button at the bottom of the screen.

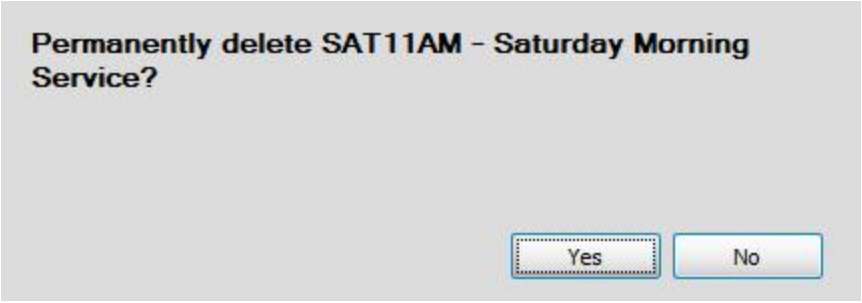
Remove a Batch Code

The software will let you remove a batch code only when the batch code has not been used in the software. To find out which case applies to you, click the item you wish to delete and click the — **Remove Selected** button at the

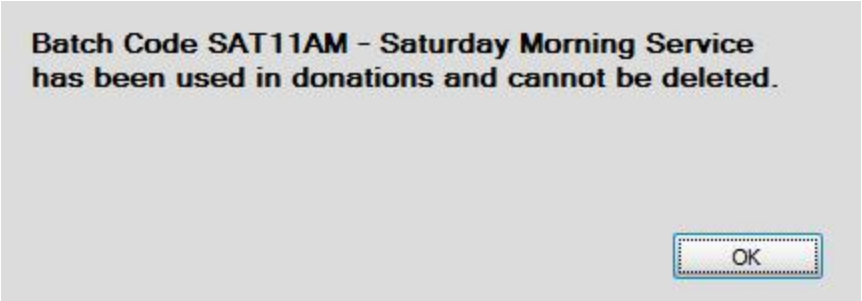
bottom of the screen.



If you get the following message and wish to delete the item from the list, click the **Yes** button and the batch code and description will disappear from the list.



Otherwise, if you receive the following message, press **OK** and the batch code and description will not disappear.



This also means that you will not be able to delete the batch code and descriptions until next year. To find out or change when your next year begins, go to the **Donations Settings** *(pg 297)* screen and check above the setting for the **Start Month** and the default date range that appears.

When you are finished, click the **OK** button at the bottom of the screen.

Reversals and Corrections After Posting

At some point, you will find that a donation that has already been posted into the system contains information that is either incorrect or invalid. These corrections are made either from **Browse Donations** *(pg 10)* or from the **Posted Batches** screen. Use the following explanations to determine which action you'll need to take in order to make the change(s) to the applicable donation(s).

Correcting a Single Donation

When you **Correct a Donation** *(pg 20)*, only the transaction that contains the original donation information will automatically be marked as reversed. In addition, one more transaction will automatically be created with the negative amount of what the original donation contained. Finally, the correction you made to the donation will be posted as a new transaction that will show on statements and reports.

Correcting an entire Batch of Donations

When you **Correct Posted Batches** *(pg 57)*, all the transactions that the original batch contains will be marked as reversed. In addition, another transaction will automatically be created with the negative amount of what each of the original donations contained. Finally, the correction you made to the Batch of donations will be posted as new transactions for every donation in the Batch which will show on statements and reports.

Reversing a Single Donation

When you **Reverse a Donation** *(pg 25)*, only the transaction that contains the original donation will be marked as reversed. Also, a new transaction will be created with the negative amount of what the original donation contained.

Reversing a Batch of Donations

When you Reverse Posted Batches (pg 61), every transaction that the batch contains will be marked as reversed. Also, a new transaction will be created for each transaction that was marked as reversed. Each new transaction will contain a negative amount of what the original donations contained.

> **Note:**
>
> *Reversals are used in place of deletions, this allows an iron-clad audit history to be maintained. Reversing a transaction is **permanent**; **it is not possible to reverse a reversal**.*

Correct Posted Batches

Use the following instructions to correct an **entire batch** of donations that has already been posted into the software with errors. Correcting a posted donations batch will give you the opportunity to change either the Batch Codes (pg 53) or the **Batch Date Occurred**.

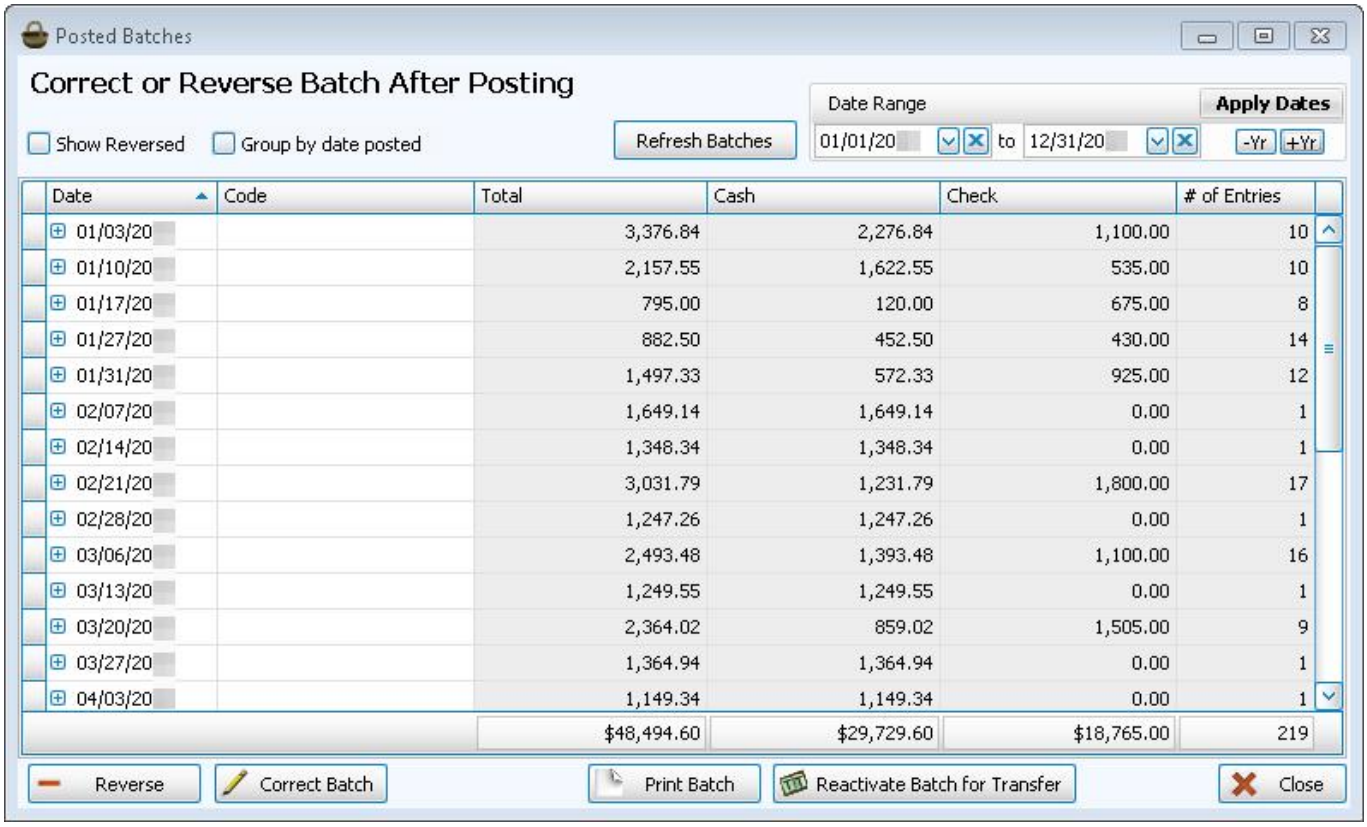
Note the difference:

If you need to correct **individual donations** in the batch, be sure to follow the instructions in Correct a Donation (pg 20) instead of the instructions below. If you need to reverse an **individual donation** without reversing the entire batch, you need to Reverse a Donation (pg 25) instead. If you need to reverse the **entire batch** of donations, you need to Reverse Posted Batches (pg 61) instead.

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

2. Click the **Posted Batches** button.

3. Enter the desired date range and click on the **Apply Dates** button. The relevant batches will appear:

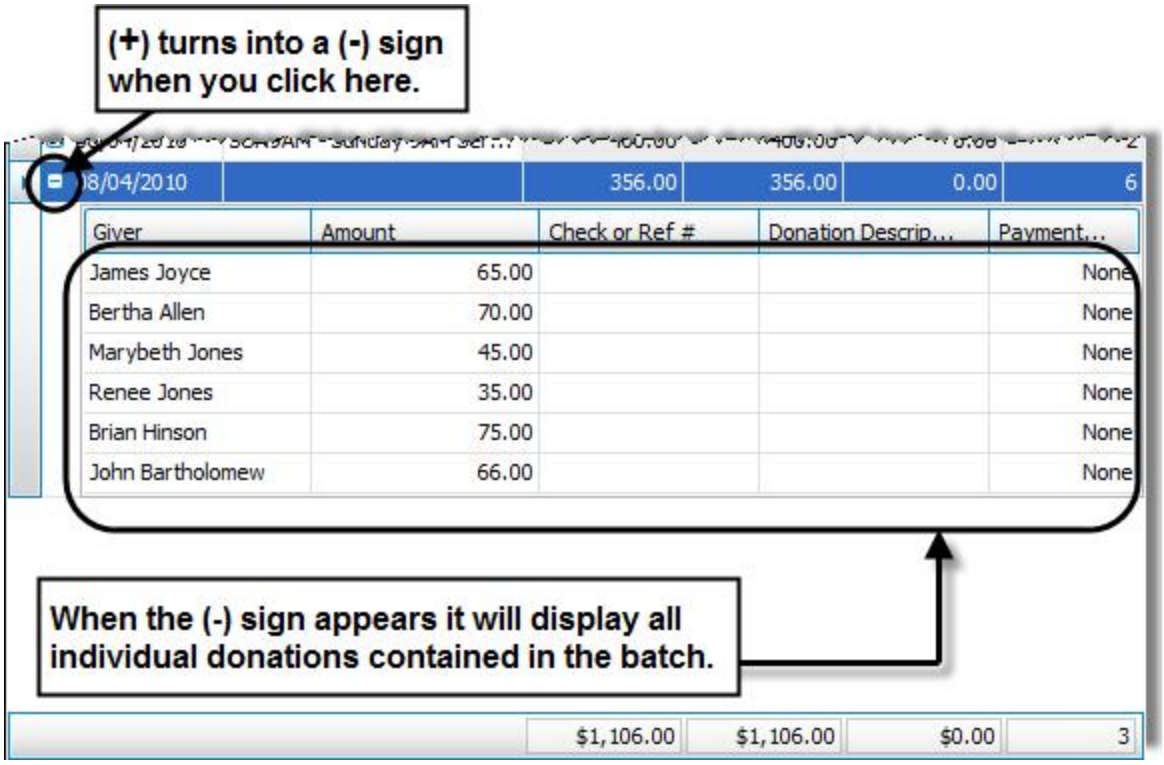


Date	Code	Total	Cash	Check	# of Entries
01/03/20		3,376.84	2,276.84	1,100.00	10
01/10/20		2,157.55	1,622.55	535.00	10
01/17/20		795.00	120.00	675.00	8
01/27/20		882.50	452.50	430.00	14
01/31/20		1,497.33	572.33	925.00	12
02/07/20		1,649.14	1,649.14	0.00	1
02/14/20		1,348.34	1,348.34	0.00	1
02/21/20		3,031.79	1,231.79	1,800.00	17
02/28/20		1,247.26	1,247.26	0.00	1
03/06/20		2,493.48	1,393.48	1,100.00	16
03/13/20		1,249.55	1,249.55	0.00	1
03/20/20		2,364.02	859.02	1,505.00	9
03/27/20		1,364.94	1,364.94	0.00	1
04/03/20		1,149.34	1,149.34	0.00	1
		$48,494.60	$29,729.60	$18,765.00	219

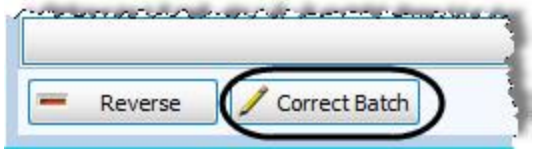
4. Click the line that contains the information about the batch that you want to reverse.

Note:

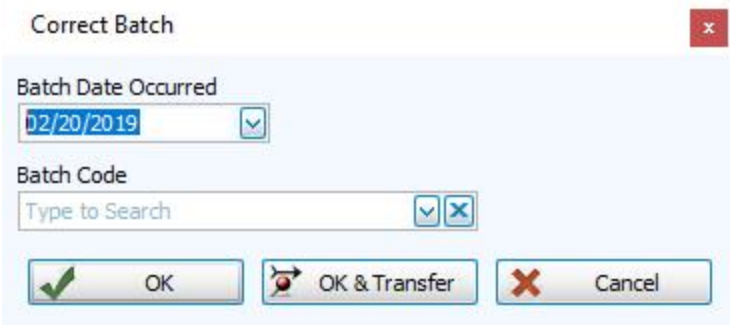
Click the **expand** *button to the left of each row to view details (when expanded it will become a* **collapse** *button).*



5. Click the **Correct Batch** button in the bottom left corner of the screen.



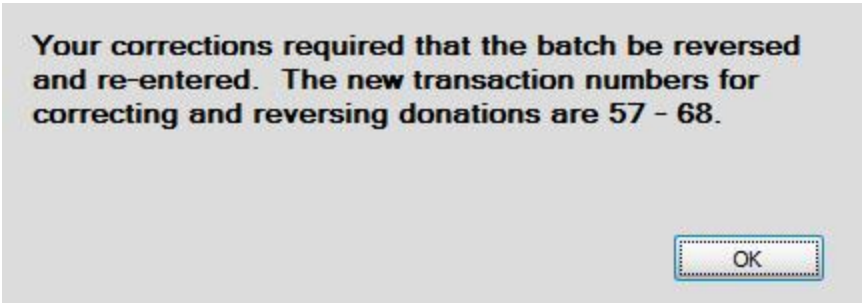
6. Choose from either of the following options:



   - Change the date in the **Batch Date Occurred** box if you would like the batch to be recorded with a different batch posting date.
   - If you would like to change the **Batch Code**, click the dropdown button of the **Batch Code** box and choose from the list of available **Batch Codes** *(pg 53)*.

7. Click either:
   - **OK** to confirm without transferring to the **Accounting** Module
   - **OK & Transfer** to also **Transfer Donations to Accounting** *(pg 66)*.
     OR
   - **Cancel** to discard changes without saving.

A message will show you the transaction numbers for each donation correction in the batch.

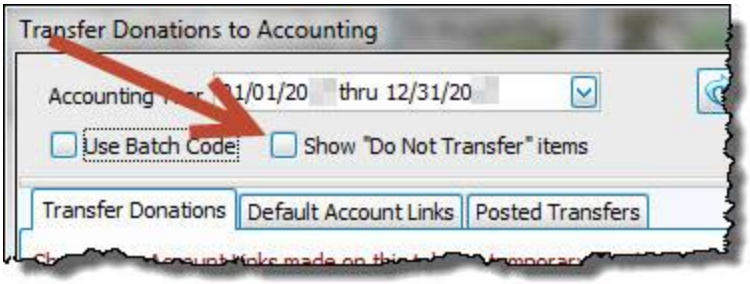


If afterward, you would like to view the transactions contained in the corrected batch, make sure that you take note of the transaction numbers. You can then look up the transactions by **Transaction #** on the **Browse Donations** *(pg 10)* screen.

8. Click the **OK** button.

Important!

If you change only change the giving account and NOT the amount for either a single donation or a whole batch that was previously transferred to **Accounting**, it will not automatically show up in Transfer Donations to Accounting *(pg 66)*. To see any of these corrections where the amount has not changed, you will need to ☑ check the "**Show 'Do Not Transfer' items**" box on the Transfer Donations to Accounting *(pg 66)* screen after you save your changes:



When you are finished, you can either choose another batch to correct, or exit the screen by clicking the **Close** button in the bottom right corner of the Posted Batches screen.

Reverse Posted Batches

Use the following instructions to reverse an **entire batch** of donations. Reversing a posted donations batch will essentially **delete every single donation** contained within the batch you selected.

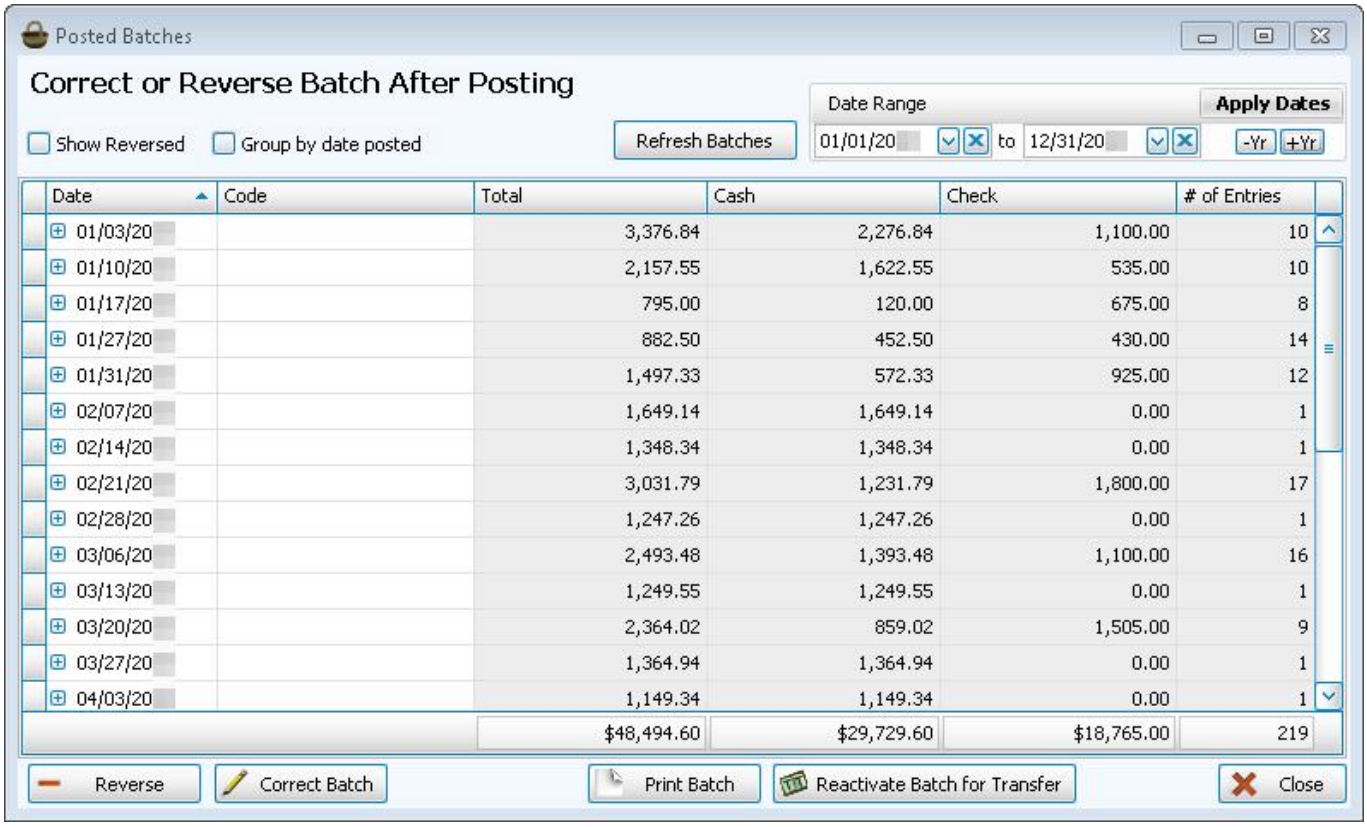
Note the difference:

If you need to reverse an **individual donation** without reversing the **entire batch**, you need to Reverse a Donation *(pg 25)* instead. If you need to alter or correct **individual donations** in the batch, you need to Correct a Donation *(pg 20)* instead. If you need to correct the date or code of an **entire batch** of donations, you need to Correct Posted Batches *(pg 57)* instead.

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

2. Click the **Posted Batches** button:

3. If needed, change the **Date Range**:

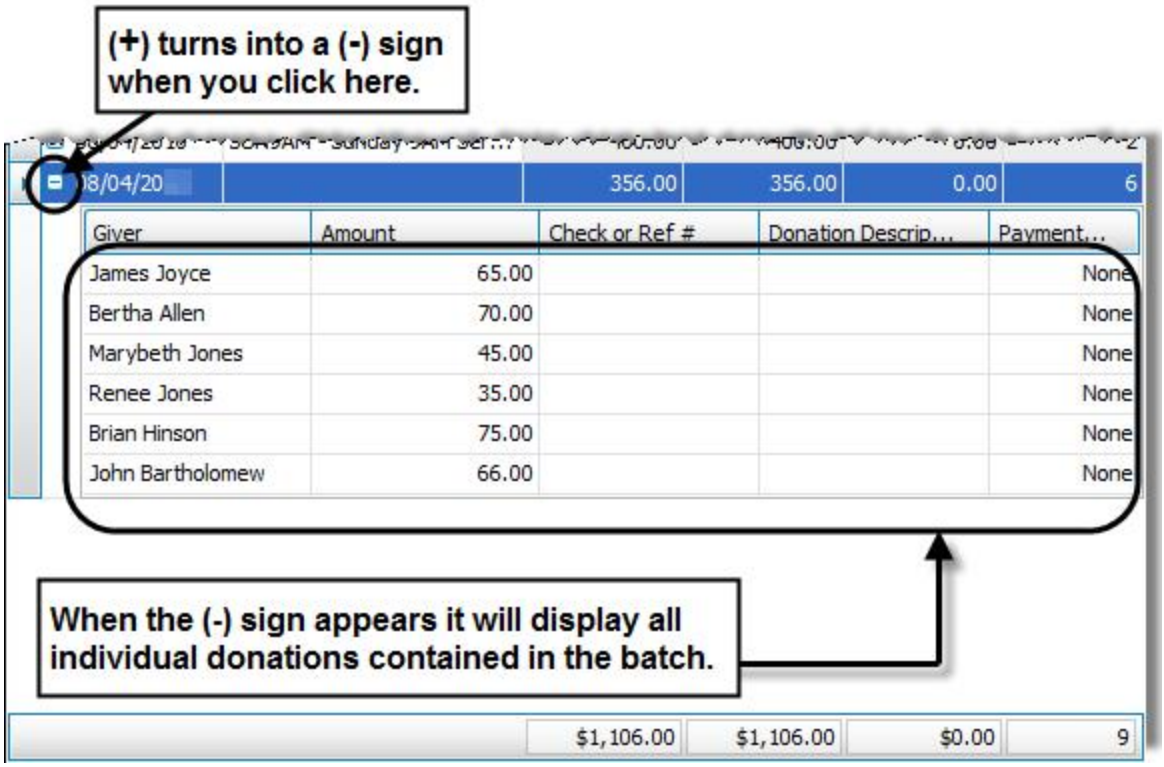


Date	Code	Total	Cash	Check	# of Entries
01/03/20		3,376.84	2,276.84	1,100.00	10
01/10/20		2,157.55	1,622.55	535.00	10
01/17/20		795.00	120.00	675.00	8
01/27/20		882.50	452.50	430.00	14
01/31/20		1,497.33	572.33	925.00	12
02/07/20		1,649.14	1,649.14	0.00	1
02/14/20		1,348.34	1,348.34	0.00	1
02/21/20		3,031.79	1,231.79	1,800.00	17
02/28/20		1,247.26	1,247.26	0.00	1
03/06/20		2,493.48	1,393.48	1,100.00	16
03/13/20		1,249.55	1,249.55	0.00	1
03/20/20		2,364.02	859.02	1,505.00	9
03/27/20		1,364.94	1,364.94	0.00	1
04/03/20		1,149.34	1,149.34	0.00	1
		$48,494.60	$29,729.60	$18,765.00	219

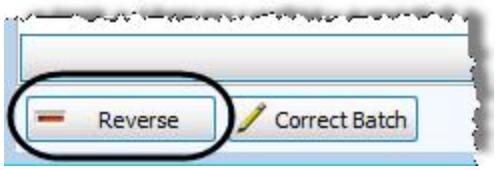
4. Click the line that identifies the information about the batch that you want to reverse.

Note:

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

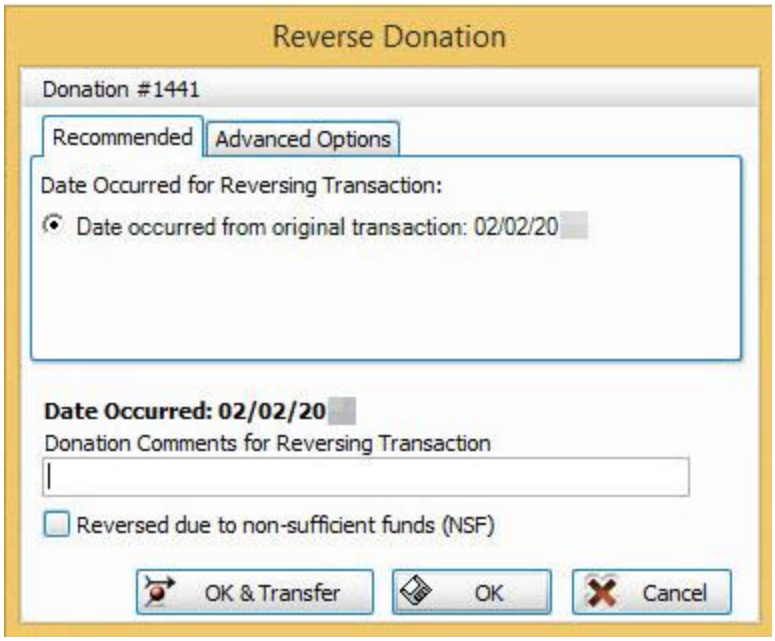


5. Click the **Reverse** button in the bottom left corner of the screen.



> **Note:**
>
> *Reversals are used in place of deletions, this allows an iron-clad audit history to be maintained. Reversing a transaction is* ***permanent****;* ***it is not possible to reverse a reversal****.*

6. The **Reverse Donation** screen appears and gives you the following options:



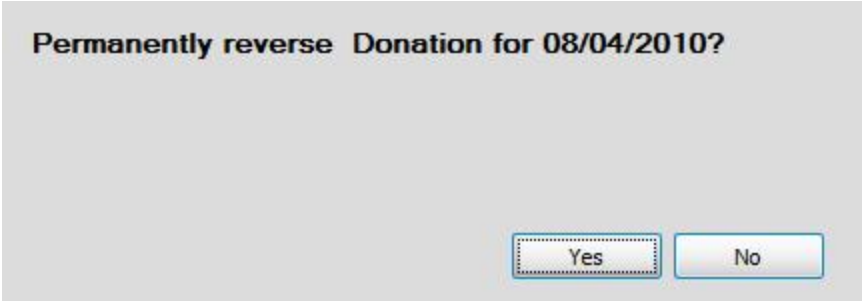
- **Date occurred from original transaction:** Click to mark the ◉ radio button next to this option if you would like a reversal transaction for each reversed donation in the batch to contain the same date as each donation originally posted.
- **Today:** Click to mark the ◉ radio button next to this option if you would like a reversal transaction for each reversed donation in the batch to contain today's date.

- **Other date:** Click to mark the radio button next to this option if you would like a reversal transaction for each reversed donation to contain a different date. Then, click the dropdown button and select the desired date.

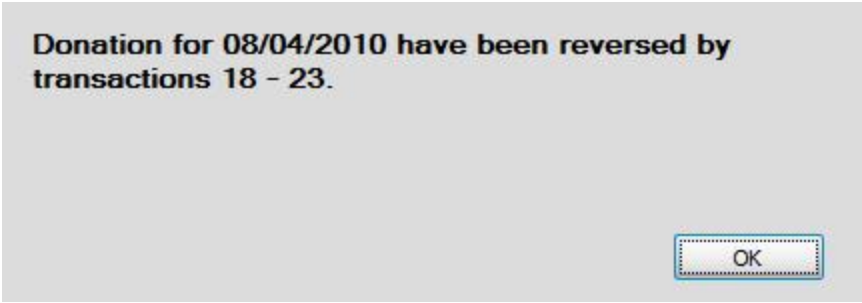
7. In the **Donation Comments** field, enter any additional information that you would like to attach to the donation to be reversed.
8. If you are reversing the whole batch due to NSF reasons, place a checkmark in the **Reversed due to non-sufficient funds (NSF)** box.

   Reversed due to non-sufficient funds (NSF)

9. Click the **OK** button to confirm without transferring to **Accounting**, or **OK & Transfer** to transfer the reversal to Accounting after confirming the reversal. A message will prompt you to verify the *permanent* reversal of the selected batch.



10. Click **Yes** and a message will show you the transaction numbers for each donation reversal in the batch.



> **Note:**
>
> *If afterward, you would like to view the transactions you reversed in the batch, make sure that you take note of the transaction numbers. You can then look up the transactions by **Transaction #** on the Browse Donations (pg 10) screen.*

11. Click **OK** and the batch will disappear from the list of Posted Batches.

When you are finished, you can either choose another batch to reverse or correct, or exit the screen by clicking the **Close** button in the bottom right corner of the Posted Batches screen.

Transfer Donations to Accounting

Once you have posted a batch of donations using Enter Donations *(pg 29)*, you can transfer the information from the Church Windows **Donations** Module to the **Accounting** Module. To be able to do so, you must have a Chart of Accounts set up in the **Accounting** Module. Then, you must Link Donations to Accounting *(pg 301)* so that your **Donations** accounts are matched up with the corresponding **Accounting** Module Chart of Accounts.

To access the Transfer Donations to Accounting screen:

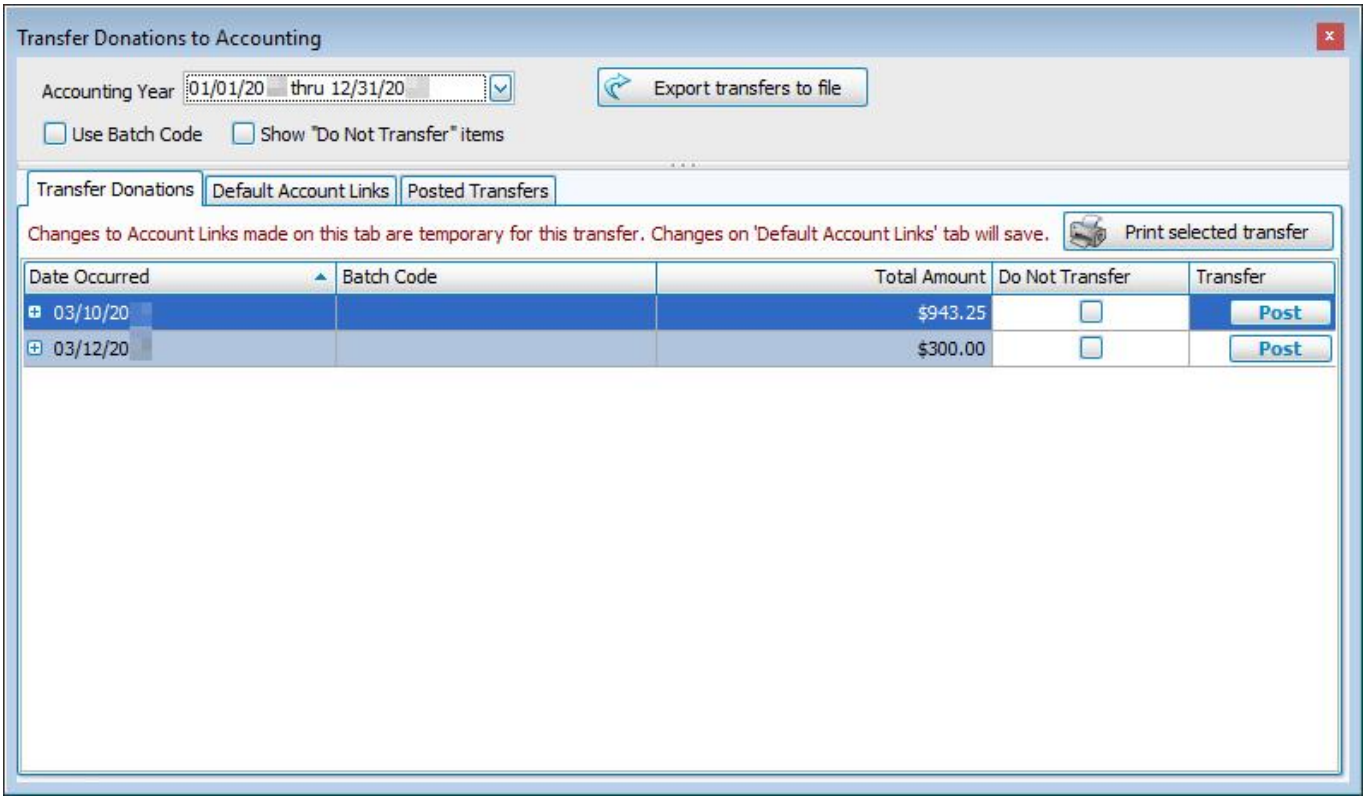
- From The Initial Portal of Church Windows choose either:

  1. **Donations**
     - Then click **Donations** in the Button Bar
     - Click the **Transfer to Accounting** button

     OR

  2. **Accounting**
     - Then click **Transactions** in the Button Bar
     - Click the **Transfer to Accounting** button

- The **Transfer Donations to Accounting** screen will appear:



- The tabs in this screen allow you to perform the following tasks:

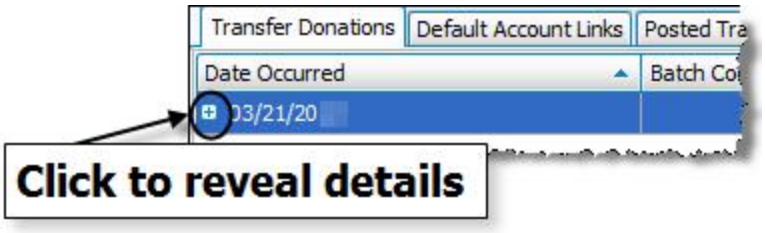
Transfer Donations

When a batch of donations is posted, you can then transfer the batch from **Donations** to **Accounting**. To access the Transfer Donations tab that contains the options necessary to transfer the batch, you can click the **Post & Transfer** button on the Enter Donations *(pg 29)* screen. Otherwise, click the **Transfer to Accounting** button from the series of buttons found above in the **Donations** or **Accounting** menus.

Locate the batch that you want to transfer to Accounting. You can rearrange the order of the items being displayed by clicking any of the columns.

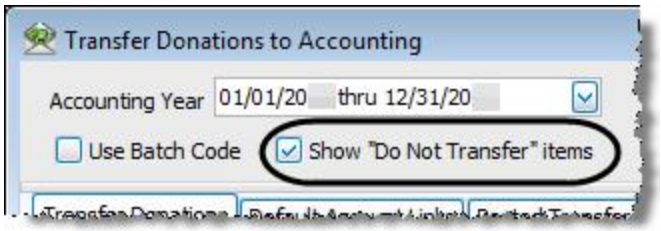
- **Date Occurred:** The date on which the batch was posted.
- **Batch Code:** Displays the batch code used at the time the batch was posted, if used.
- **Total Amount:** The amount of all the donations entered into the batch.

Each line represents a batch that has been entered and posted in the **Donations** Module, but not yet transferred to Accounting. Click the **expand** button to the left of each row to view details (when expanded it will become a **collapse** button).



In the revealed batch details you can only change the accounts shown in the Debited Account and Credited Account columns. If you need to make changes, click the **Debited Account** or **Credited Account** box you wish to change and select the desired account.

If you wish to currently refrain from transferring the batch to Accounting, you can click to check the **Do Not Transfer** box on the line that represents your batch. The line that contains the information about the batch will disappear only from view.



Place a checkmark in the **Show "Do Not Transfer" Items** box to bring any such items back into view at any given time. Once this box is checked, any items that have not yet been transferred will reappear unless they have been already transferred.

When you are ready to transfer the batch to the **Accounting** Module, click **Post**. The **Confirm DONA** screen shows a line for each account in the **Accounting** Module and the corresponding Debit Amount / Credit Amount that will be affected after you confirm the Donations transfer. Type any **Comments** you wish to add next to each line and/or for the whole batch. Confirm the Donations transfer to **Accounting** by clicking the **Post** button at the bottom of the screen.

A message will display the transaction number(s) created by the successful transfer of the Donations batch to the **Accounting** Module. Use the transaction number(s) in the message to locate the transaction(s) in the Browse Transactions screen of the **Accounting** Module, where each transaction involved in the batch you transferred will be kept track of as a **DONA** transaction. Click **OK** to clear the message.

The batch you posted in the Transfer Donations list will disappear. Click the **Posted Transfers** tab to locate the batch you just posted and print if necessary.

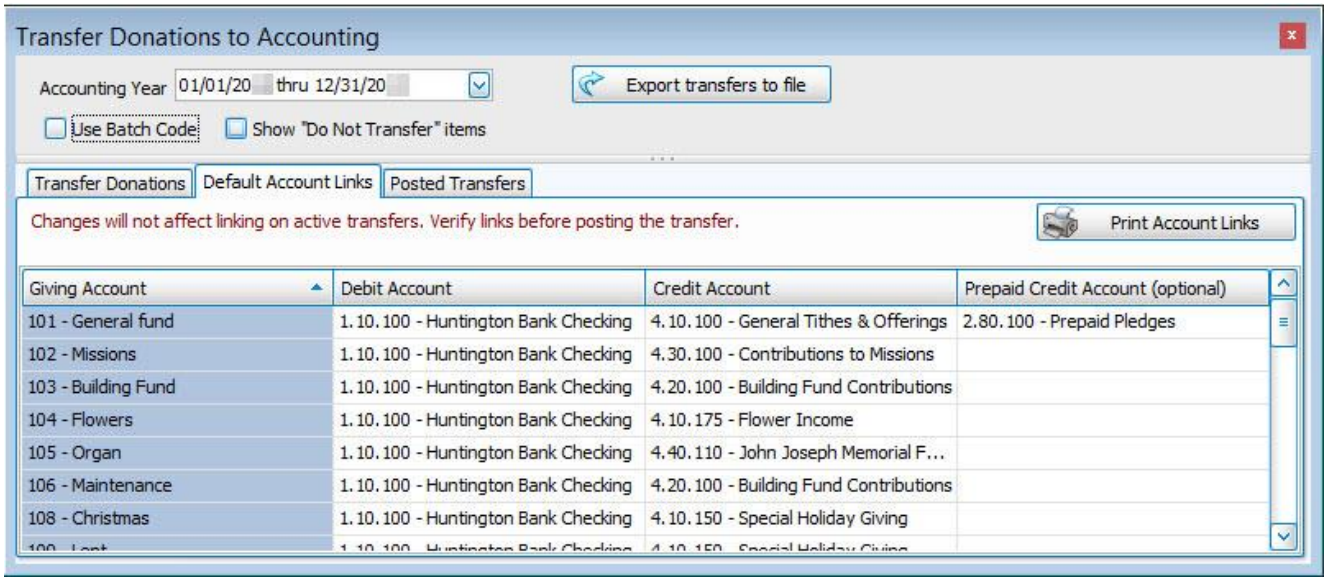
Print Selected Transfer(s)

If you wish to print the information about the batch you wish to transfer, click the line that describes the batch and select the **Print Selected Transfer** button at the bottom of the screen to customize the **Transfer Report Options** *(pg 72)*. Once you have made all of your selections, click **Print** to view a Print Preview 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.

Default Account Links

If you are using the **Accounting** Module along with **Donations**, use the **Default Account Links** tab in the

Transfer Donations to Accounting screen to Link Donations to Accounting *(pg 301)*. Here you can set up, correct, or remove the links between giving accounts in **Donations** to the accounts stored in the Chart of Accounts of the **Accounting** Module.

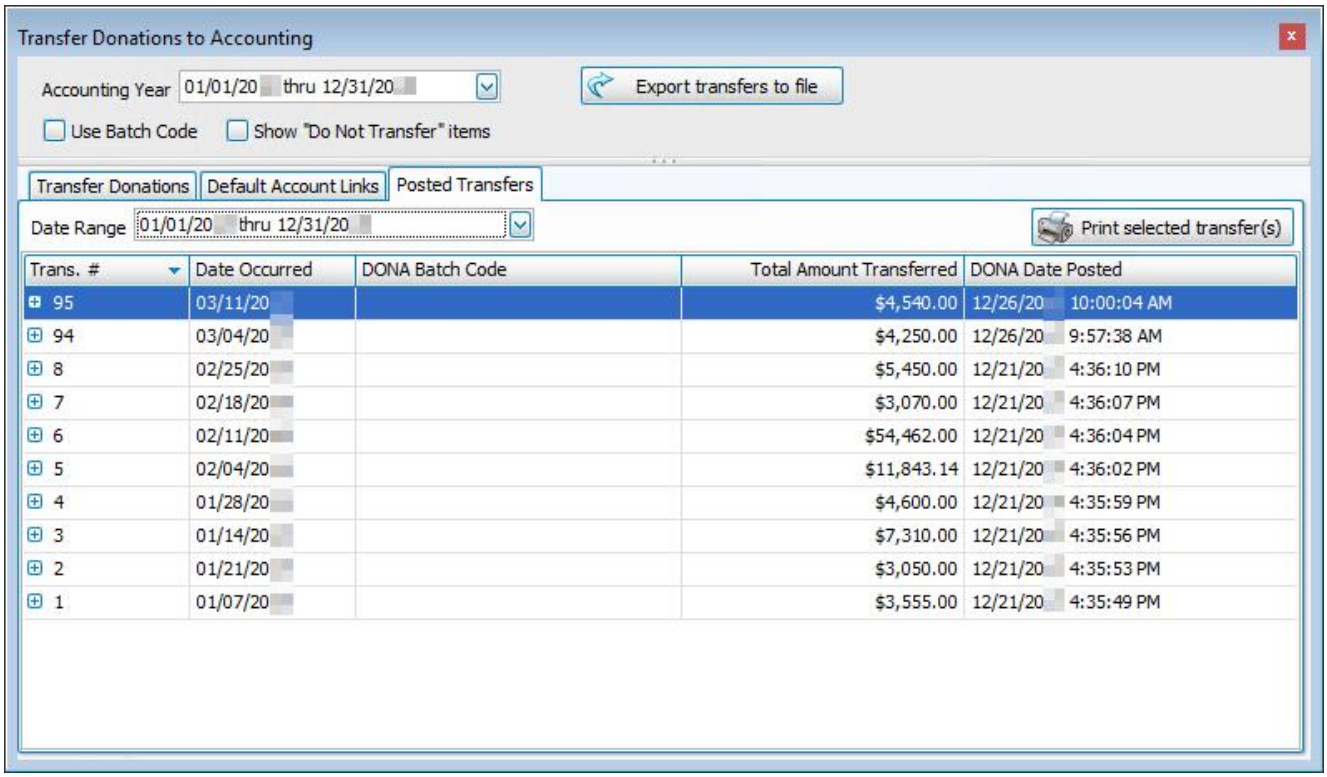


When the screen appears, on the **Default Account Links** tab, use the following columns to make the necessary adjustments.

To print or export a report that shows the current settings of the links, click the Print Account Links *(pg 303)* button.

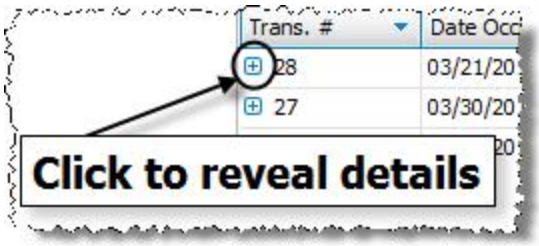
Posted Transfers

After a batch has been posted to Accounting, you can view it using the Posted Transfers tab in the Transfer to Accounting screen. Select the **Date Range** for the posted batch you seek to find. Then use any of the following columns to locate the specific batch and its entries.



- **Trans #**: The transaction number given to the **Donations** batch item(s) at the time of posting.
- **Date Occurred**: The date that the batch was manually set to represent.
- **DONA Batch Code**: The batch code posted with the **Donations** batch, if applied.
- **Total Amount Transferred**: The sum of all batch item dollar amounts.
- **DONA Date Posted**: The date on which the batch was posted to Accounting.

Click the + **expand** button to the left of each row to view details (when expanded it will become a − **collapse** button). Each set of details shows the **Batch Code**, **Amount**, **Giving Account**, **Debit Account**, **Credit Account**, and **Giving Posted** for each item in the posted batch. Click the − collapse button to collapse the details.



Print Selected Transfer(s)

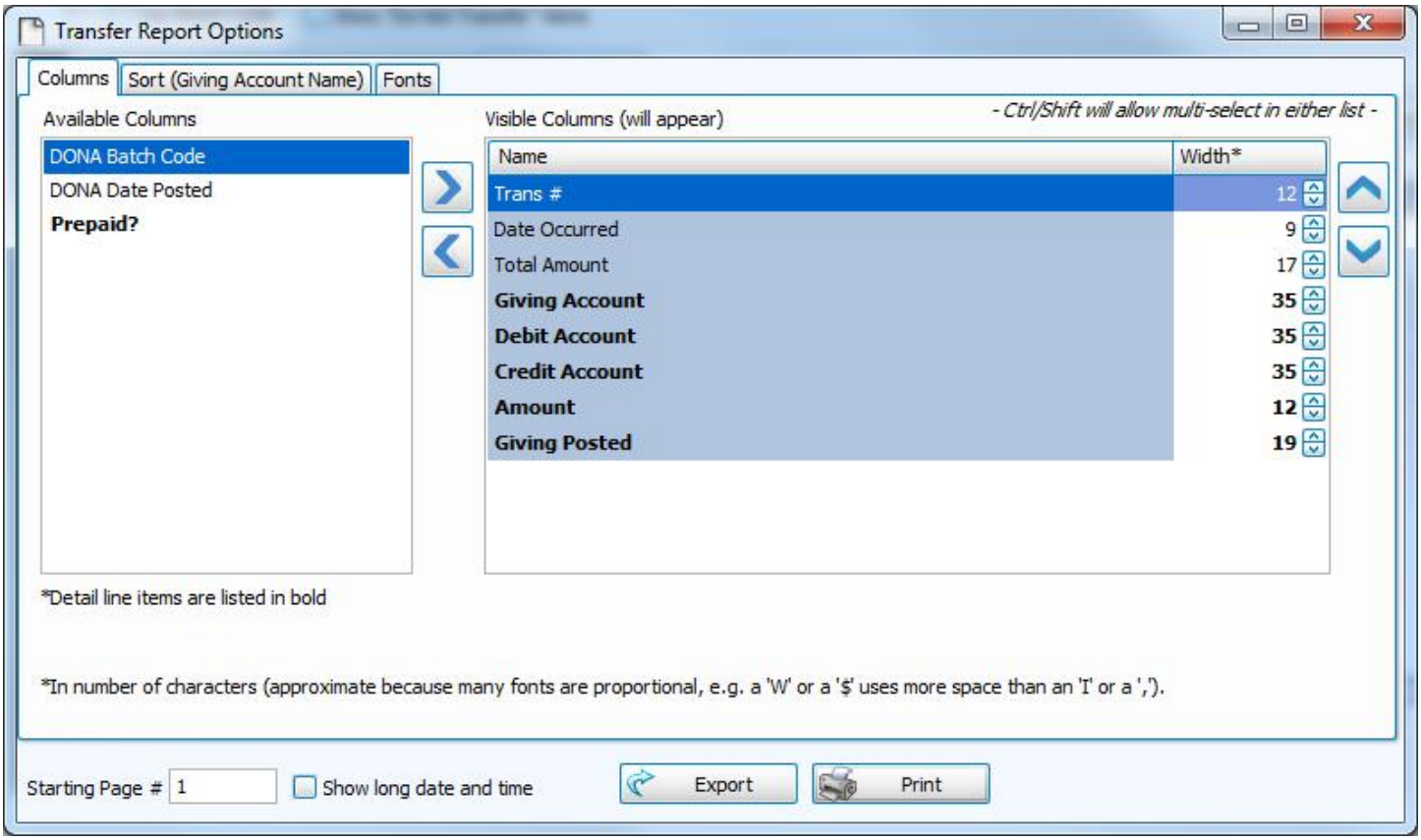
To print posted transfers, click the **Posted Transfers** tab to view the list of batches already posted to Accounting.

If you wish to print a batch in the list, click it once to select it. If you wish to select more than one line, hold down the **CTRL** key on the keyboard, and click the next desired line. Then click the **Print Selected Transfer(s)** button and the **Transfer Report Options** *(pg 72)* screen will appear. Use the tabs and options available to format the information as needed.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Transfer Report Options

Use the **Transfer Report Options** screen to print a report about batches in **Donations** either before or after you **Transfer Donations to Accounting** *(pg 66)*.



Choose any of the following tabs to apply additional settings:

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Import Donations

Any donations that were made electronically can be imported into the software from a data file provided to you by the service/company who processes your electronic donations so that you do not have to **Enter Donations** *(pg 29)* manu-

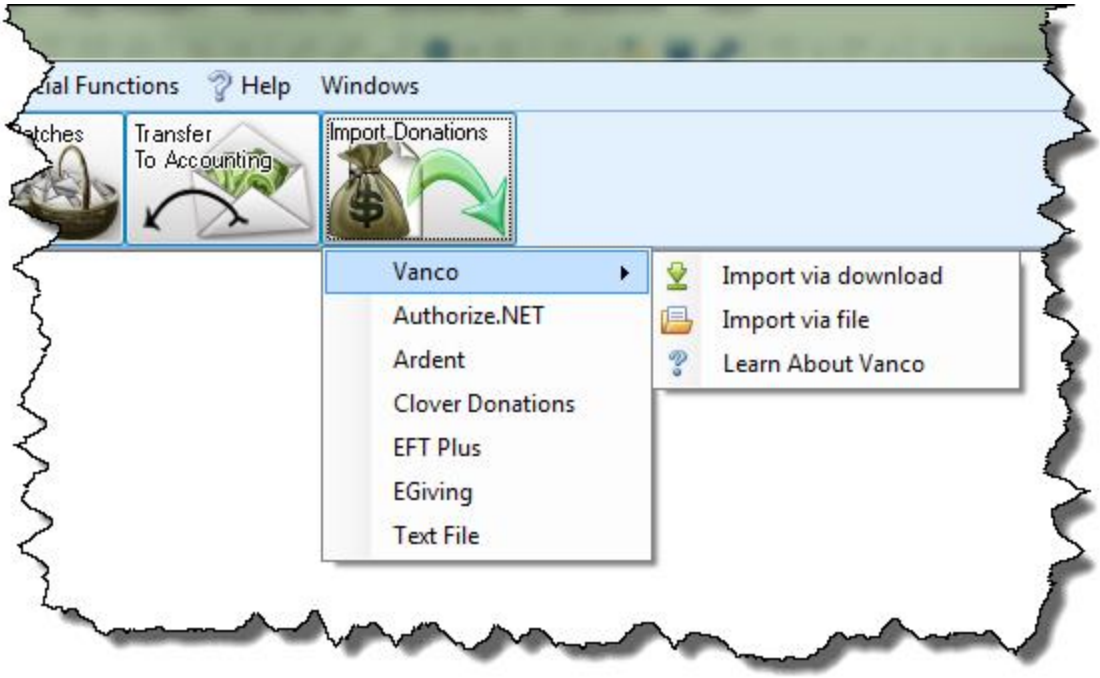
ally. Determine the type of electronic donation service you are using, and select it from the **Import Donations** button found under the **Donations** menu.

The options are as follows:

- Vanco
- Authorize.NET
- Ardent
- Clover Donations
- EFT Plus
- EGiving
- Text File

To access the Import screen:

1. From The Initial Portal of Church Windows choose **Donations**.
2. Click **Import** from the Donations menu in the Button Bar.
3. From the dropdown menu, choose either your service/company or choose **Text File**:

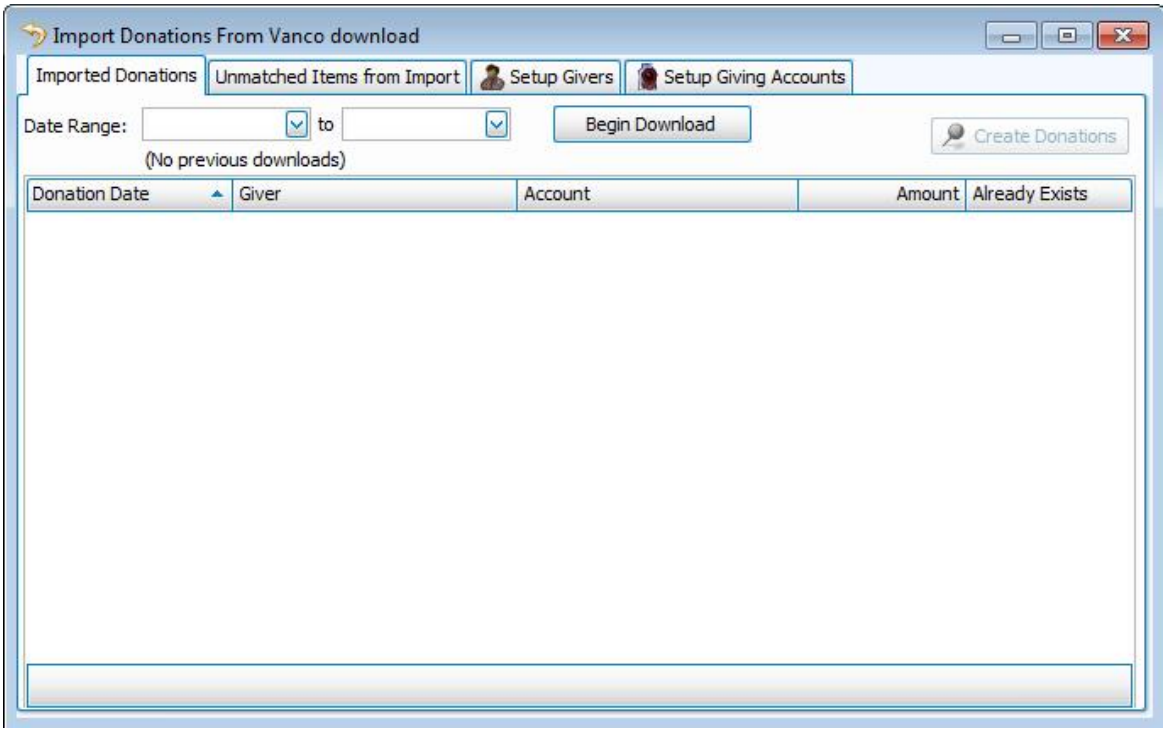


- ***Vanco***

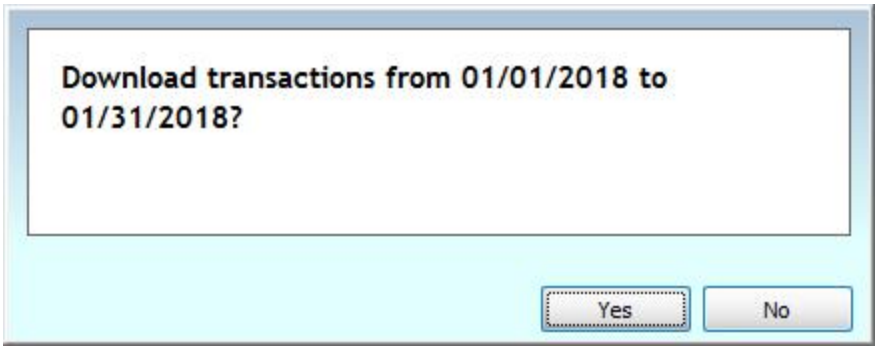
For Vanco imports, you now have two import options:

Import via download

- Login to Vanco directly to import donations, first choose a date range and then click **Begin Download**:



- A confirmation window will open, choose Yes if it is correct or No to change the dates selected:



- Then, you will login using the account credentials Vanco will provide for Church Windows:

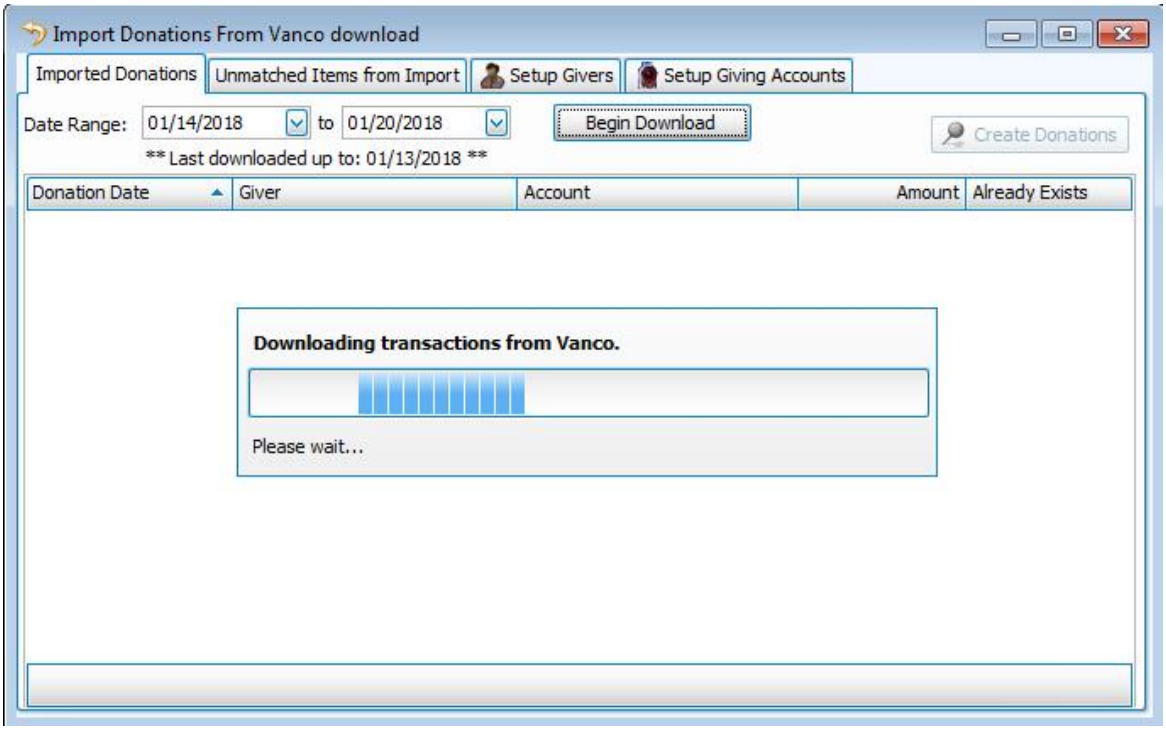
Note:

Any Church who uses Vanco and would like to use the Download option to import the giving directly into Church Windows needs to have a new Web Services Login created for them by Vanco first.

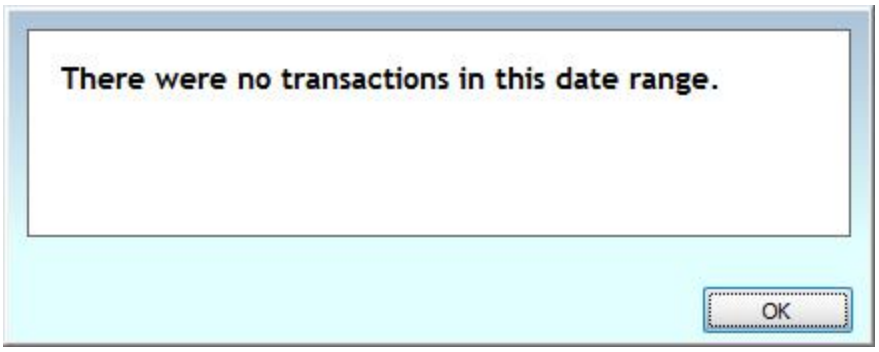
Click here to initiate this process with Vanco.

Type "Church Windows" in the "Software/Web Processor Name" box. The credentials will then be emailed to the designated Church contact.

- Your download will then begin:



- A pop-up message will alert you if there are no donations available:



- Continue on to Step 4 below.

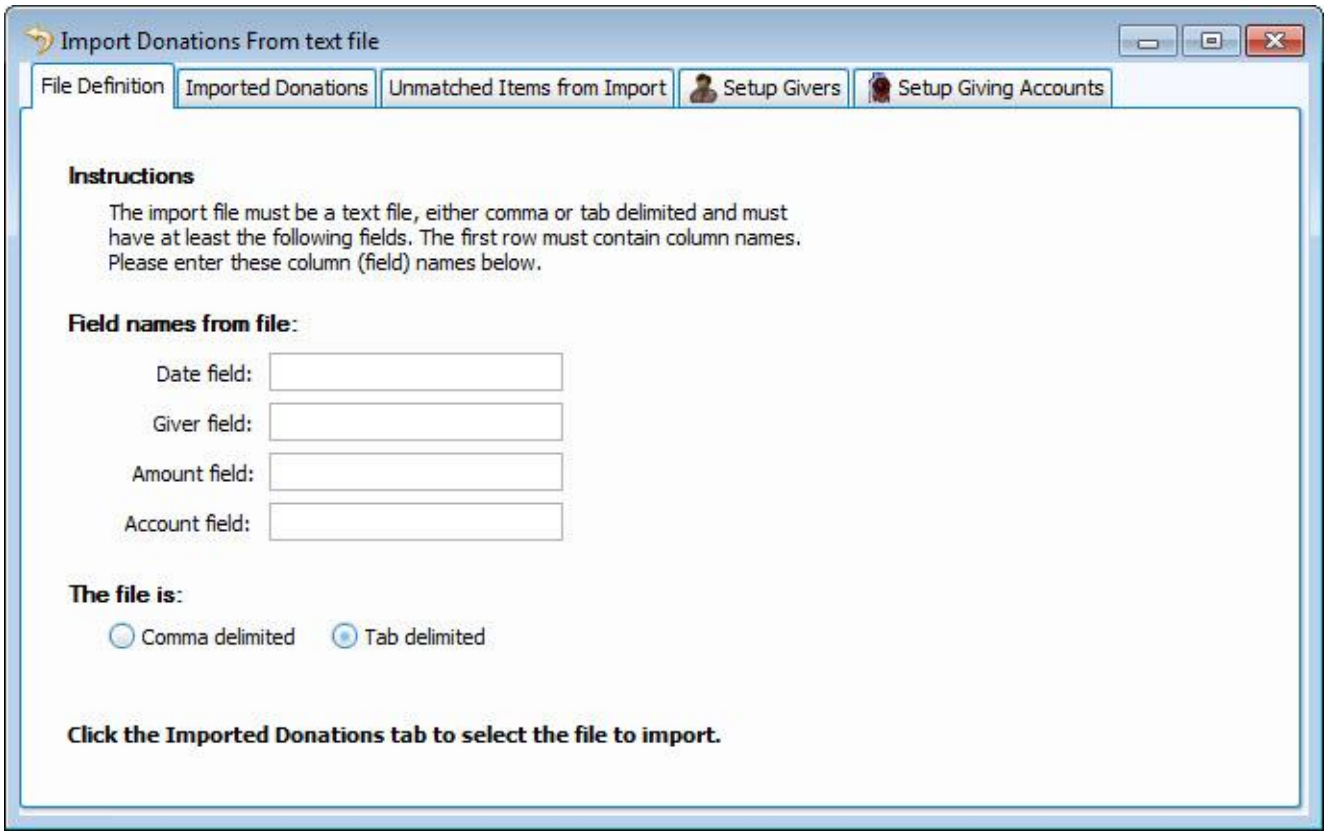
- **Import via file** - Follows the same import procedure as the other companies and text file imports, as explained below.

- **Learn About Vanco** - This link is for those who do not yet use the Vanco service and are curious about it.

- ***Authorize.NET, Ardent, Clover Donations, EFT Plus, or EGiving***
  - When the **Import** screen appears, click the **Select Import File** button.

Text File

First, you will need to follow the instructions at the top of the **File Definition tab** to enter a few additional settings:



- Match the fields names from your import file to the corresponding four import fields in Church Windows:
  - Date
  - Giver
  - Amount
  - Account
- Next, choose the file type: **Comma (.CSV)** or **Tab (.TXT)** delimited.

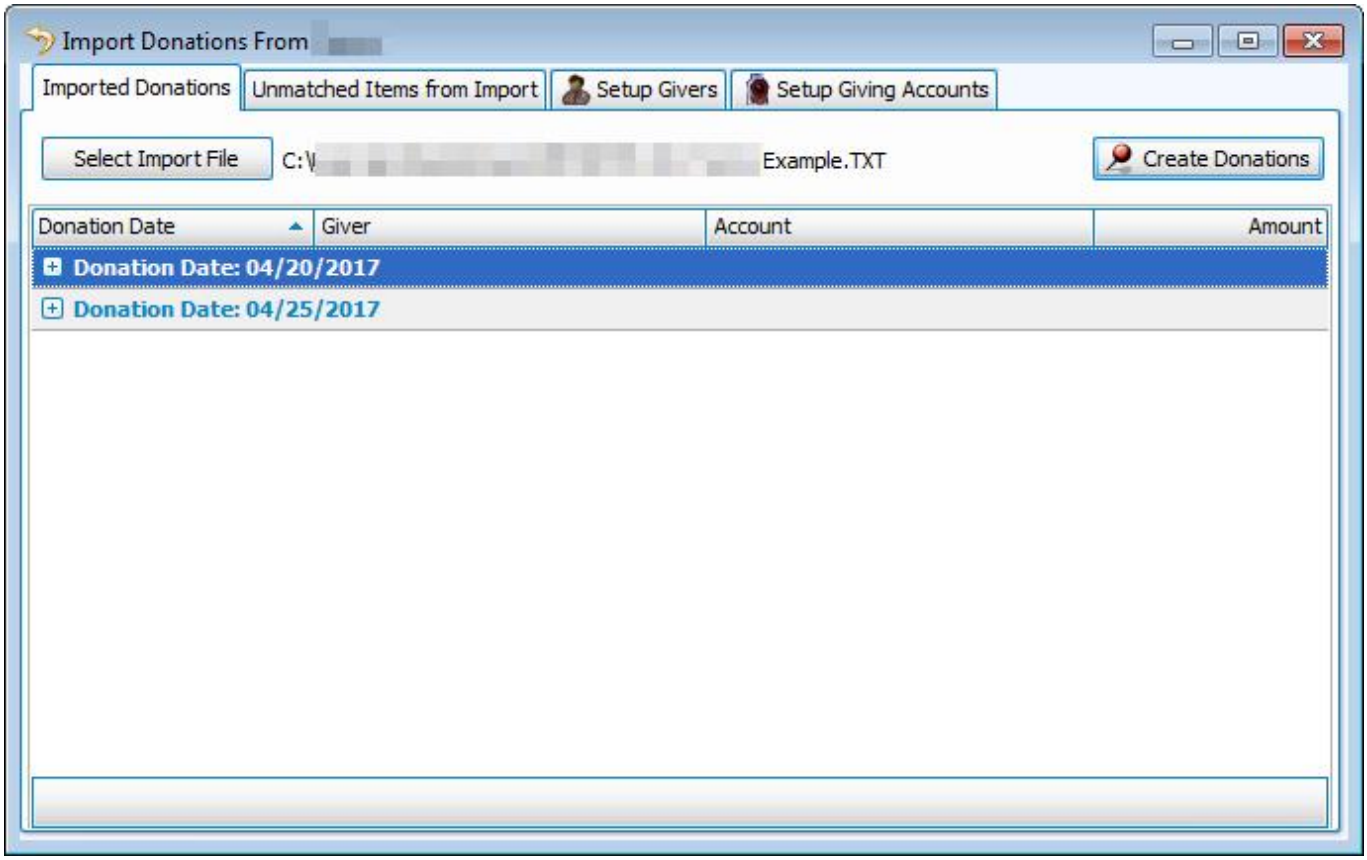
- Then click the **Imported Donations** tab and click the **Select Import File** button in the top left.

  - Use the window that appears next to navigate to the location where your import file is stored on your computer.

> **Note:**
>
> *If the file is still attached to your email, you must first download it and store it to a location on the hard drive, or on some kind of media connected to the computer where you are accessing the* ***Import Donations*** *feature.*

  - Click the file to select it, and click **Open** to proceed.

4. Regardless of which type of import you chose above, the **Imported Donations** tab will then populate the list with the contents of the import file:

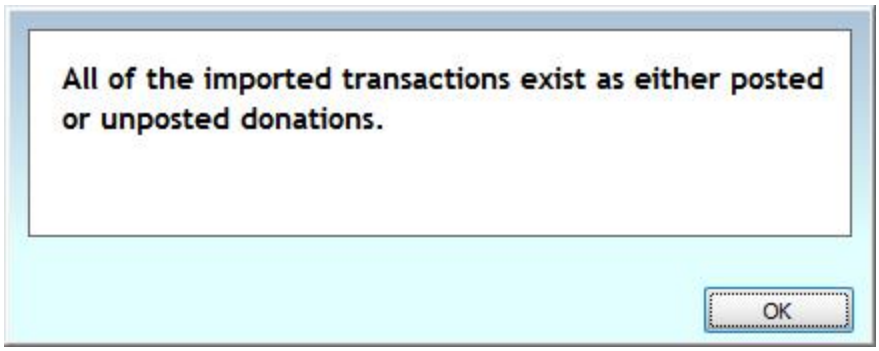


Each entry will have a **Donation Date**, a **Giver**, an **Account**, and an **Amount**.

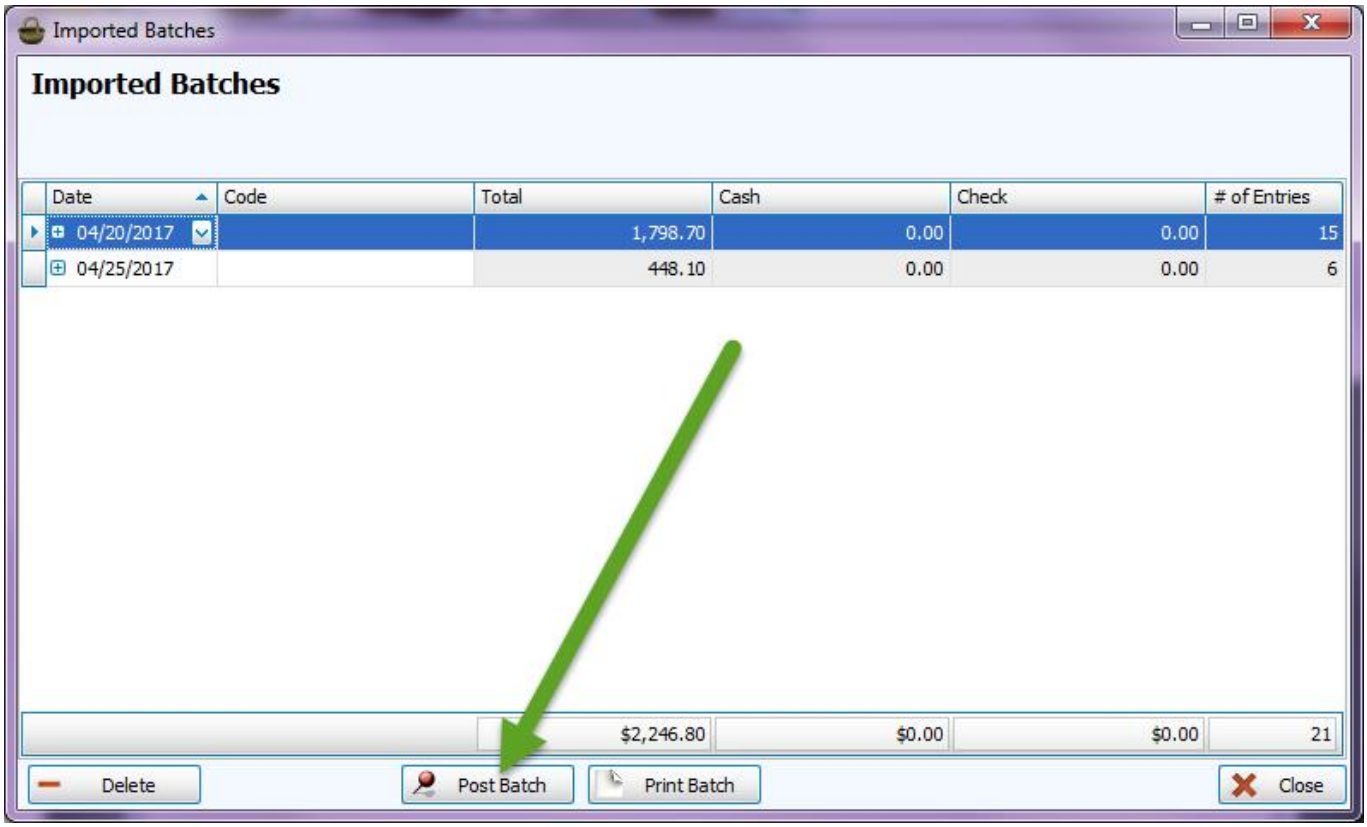
Note:

*The **Giver** and **Account** names will only populate if the items have already been linked beforehand on the Setup Givers tab (pg 82) and the Setup Giving Accounts tab (pg 83). Otherwise, you will first be prompted to link them on the Unmatched Items from Import tab (pg 81).*

5. Click the **Create Donations** button in the top right and the **Imported Batches** screen will show you the batch dates detected in the import file. The system will not duplicate identical transaction; if all of the transactions have previously been imported the following message will appear:



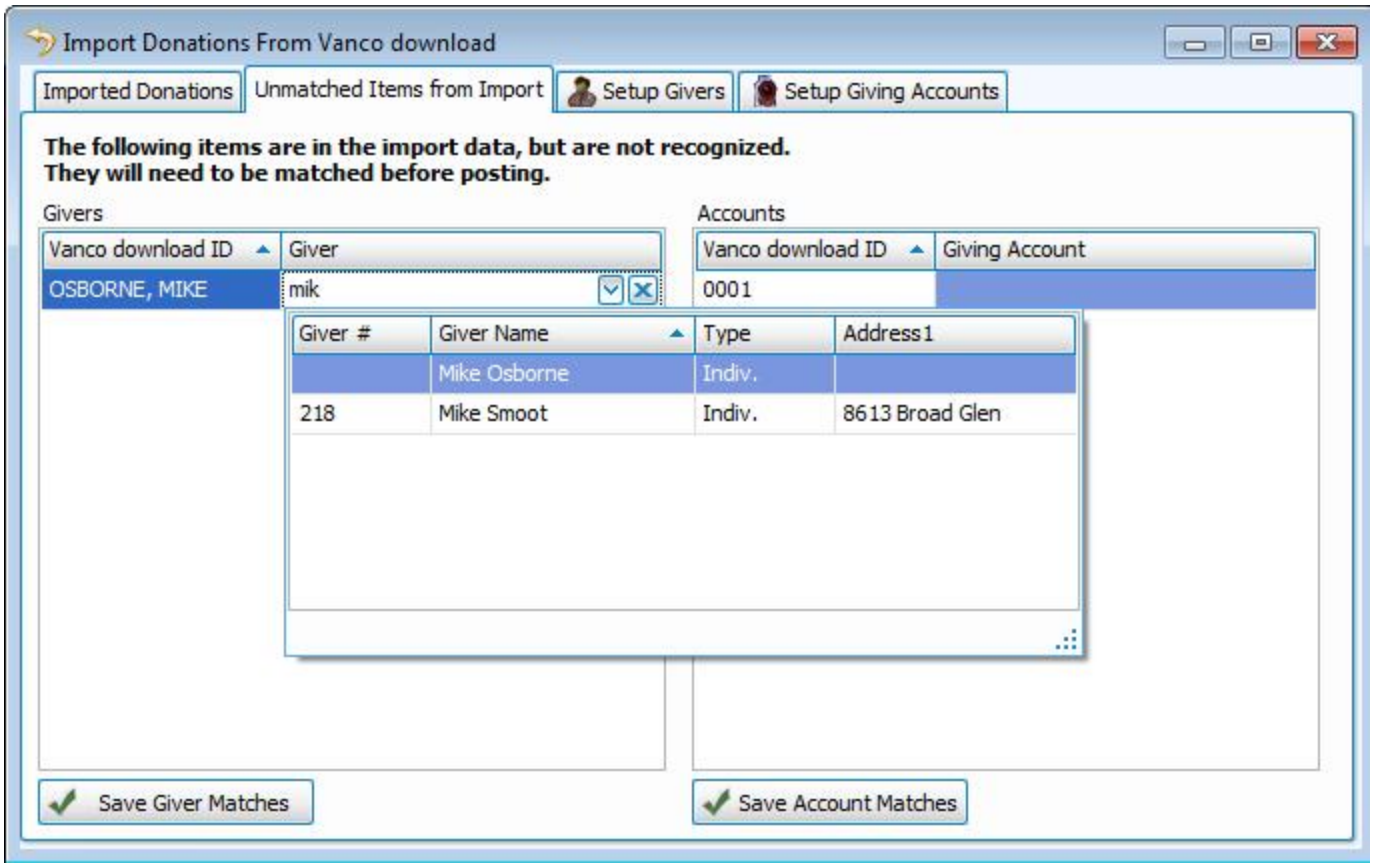
6. Click to select each batch you have imported and click the **Post Batch** button to finalize a posting of the imported batch(es) of donations:



7. Then you can Transfer Donations to Accounting *(pg 66)* just like any other manually entered batch of donations.
8. If you close the **Imported Batches** screen without posting, your batches will be saved in the Unposted Batches *(pg 42)* screen which can be accessed through the Enter Donations *(pg 29)* screen.
9. You can also click the **Print Batch** button before posting, or click the button to **Delete** the batch, according to what is needed.
10. Close the window when finished.

Unmatched Items from Import tab

If the import file contains items that are not linked to **Givers** or **Giving Accounts** currently stored in **Donations**, the **Unmatched Items from Import** tab will immediately reveal them each in its own list:



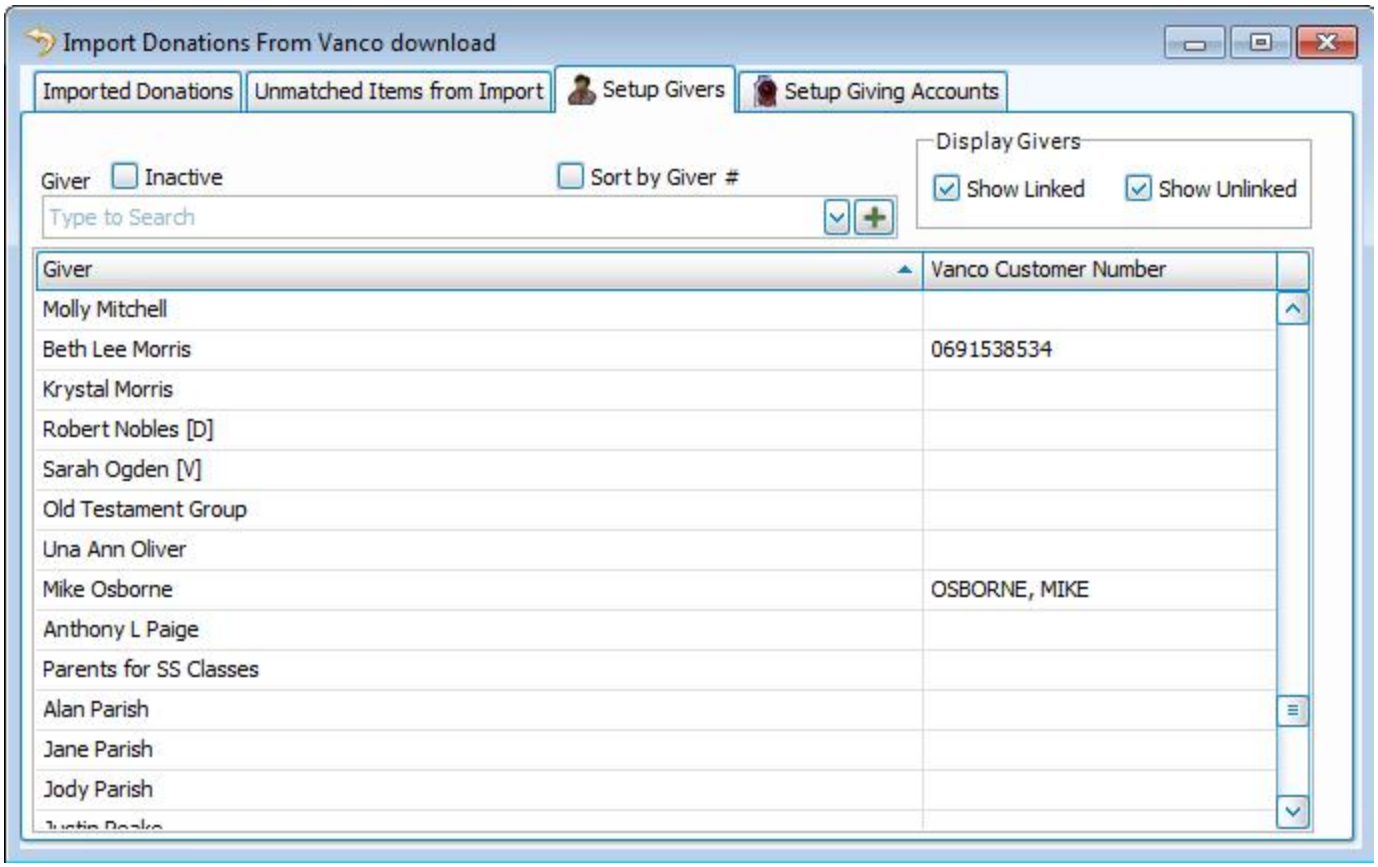
- In the Givers list, click each empty box located next to the ID.
- Choose the corresponding Giver from the dropdown box that appears.
- Then, click the **Save Giver Matches** button.
- Link together any unmatched IDs by clicking the empty box found next to it in the Accounts list.
- Then, click **Save Account Matches**.

> **Note:**
>
> *The Authorize.NET file import feature will only provide you with a **Save Giver Matches** button. However, you must still select the **Account** from the dropdown box to the right of the **Givers** list.*

Setup Givers tab

If you have Givers that opt to use electronic transfer for the donations they make, you can use the **Setup Givers**

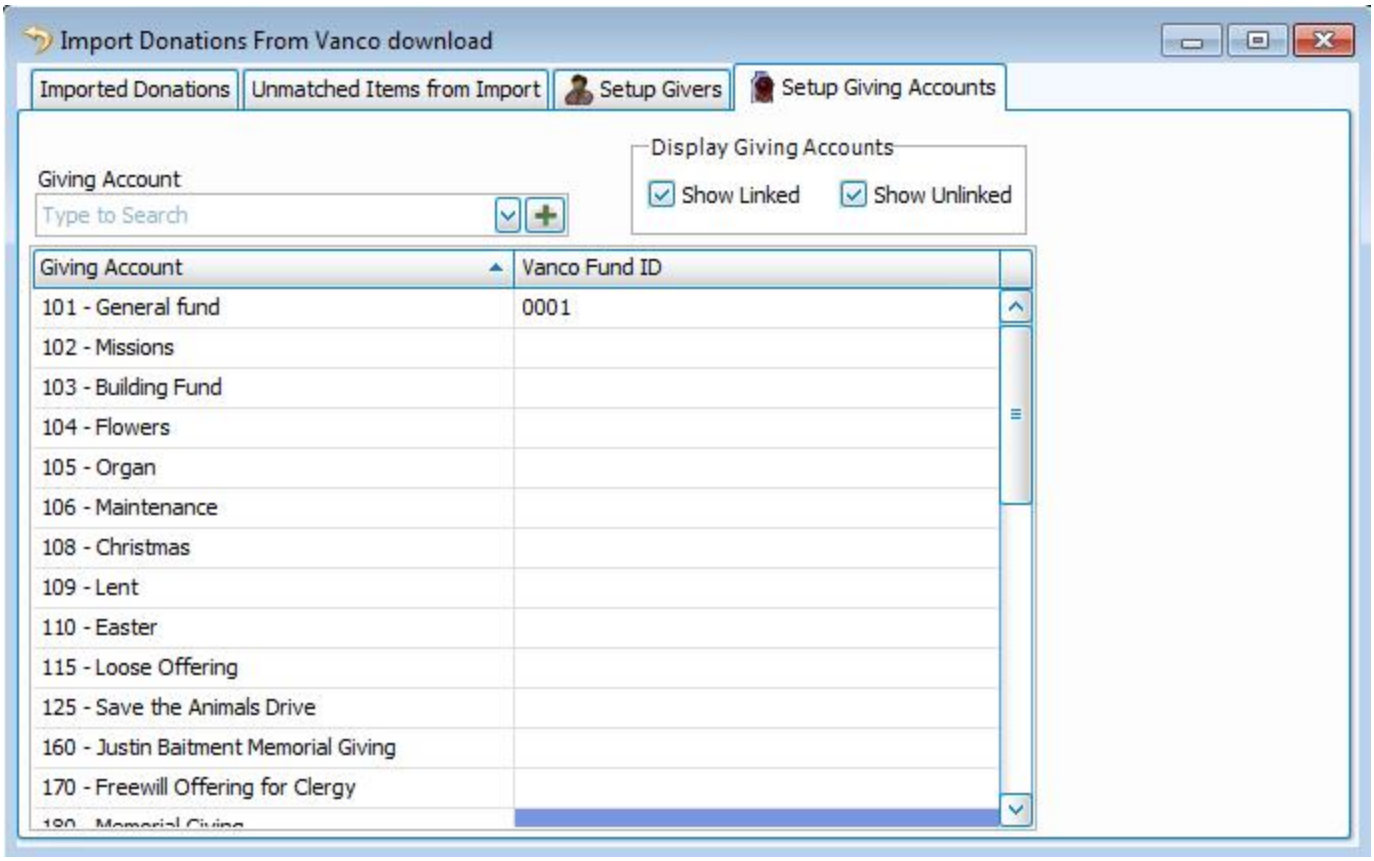
tab at any given time to link the unmatched information with the **Giver** name in **Donations**:



- Choose the **Giver** from either the dropdown box, or the list below it.
- Then, click the empty box beside the Giver name and choose the corresponding name.
- To have the list display Givers that are linked and/or unlinked, click to place a checkmark beside the **Show Linked** and/or **Show Unlinked** box.

Setup Giving Accounts tab

With the exception of Authorize.NET files, use the **Setup Givers** tab at any given time to link the unmatched information with **Giving Accounts** in **Donations**:



- Choose the **Giving Account** from either the dropdown box, or the list below it.
- Then, click the empty box beside the Giving Account and choose the corresponding name.
- To have the list display giving accounts that are linked and/or unlinked, click to place a checkmark beside the **Show Linked** and/or **Show Unlinked** box.

Chapter 3 - Accounts & Pledges

Accounts & Pledges

Here you will find various options to **Manage Accounts** *(pg 85)*, **Add an Account** *(pg 86)*, set the **Order Giving Accounts** *(pg 95)*, and it allows you to view and **Enter Pledges** *(pg 101)* and work with **Subtotals** *(pg 129)*.

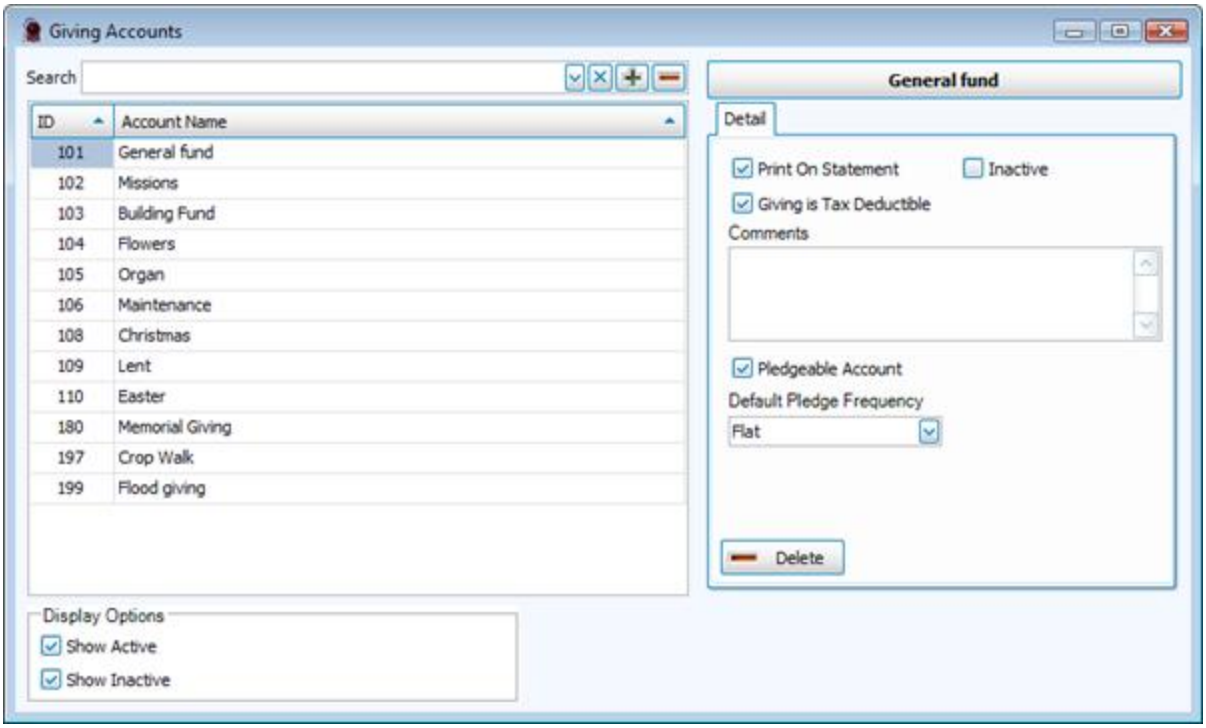
Manage Accounts

The Manage Accounts screen serves as the main control panel for all the pledge and non-pledge giving accounts. All accounts have a set of common characteristics. And yet, each one contains its own unique settings for the purpose that it serves.

To access the Manage Accounts screen:

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Manage Accounts** button from the options that appear underneath.



Use the Giving Accounts screen to perform any of the following tasks:

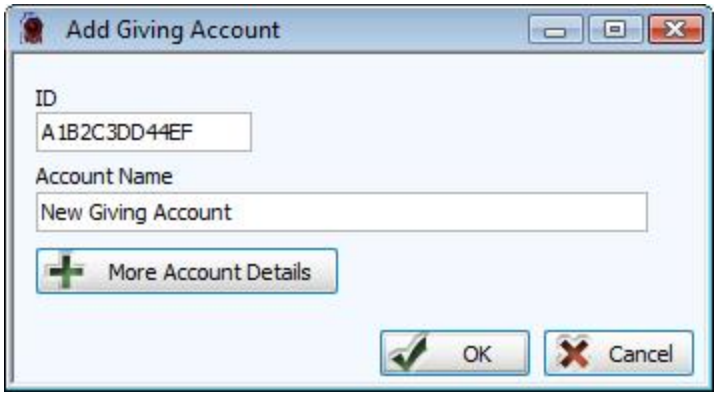
Add an Account

Use the following instructions to add an account so that you can **Enter Donations** *(pg 29)* and **Enter Pledges** *(pg 101)* for the Givers that make donations and/or **Pledges** *(pg 98)* to your Church.

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Add Account** button from the options that appear underneath.

3. Enter the following information:



- In the **ID** box, choose any kind of number and/or letter combination of your preference in the software. You might find it helpful if your Church comes up with a numbering system for its accounts, so that it can organize them in a way of which it approves.
- In the **Account Name** box, enter the desired name for the new account.

4. Click the **More Account Details** button.

5. By default, the **Print on statement** and **Pledge Account** boxes will be checked for you. Make any desired changes to these or any other options in this area.

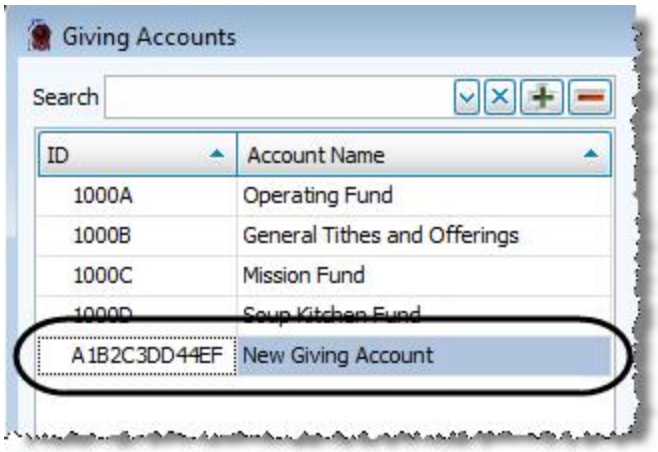
   - **Print on statement:**
     If you want the account to appear on **Donation Statements** *(pg 248)* for each Giver that will be making donations and/or pledges to it, make sure that a checkmark is placed in this box.
   - **Inactive:**
     Place a check in this box to hide the account from the **Enter Donations** *(pg 29)* screen. You might find this useful if, for example, you set up the account at one point in time, but plan to use it at a later time. Or, you might find this useful if you have finished using the account and do not want further donations to be entered towards it.
   - **Giving Is Tax Deductible:**
     If you or your Church have determined that the money that is being collected from donations is to appear as an amount that is tax deductible on the statement of the Giver, check this box.
   - **Comments:** (Optional)
     Place any additional information about this account. For example, if you place information about the account you can have it available for reference and understanding at a later time.
   - **Pledgeable Account:**
     If you want to make this account keep track of pledges, as well as giving, make sure that a checkmark is placed in this box. If you do not place a check in this box, the account will **not** appear on the **Pledges** *(pg 98)* screen.
   - **Frequency:**
     If your Church has determined that anyone who makes a pledge to this account is required to make the pledge to make a donation at only one certain frequency, click the dropdown button and choose the desired frequency.

6. When you are finished, click the **OK** button and the Add Giving Account screen will disappear.

7. To verify that the account has been added, click **Accounts & Pledges** in the **Button Bar** at the top of the screen

8. Click the **Manage Accounts** button from the options that appear underneath.

9. Find the giving account that you added in the list of Giving Accounts on the left side of the screen and click it once to select it.



10. Take a look at the right side of the screen to verify that the settings you made are correct. If you need to make any changes, you can make them now.

If you wish to add additional Giving Accounts, click the **Add** button at the top of the list of Giving Accounts:

Then, in these instructions:

a. Follow Steps 3 through 6.

b. Skip Steps 7 and 8.

c. Follow Steps 9 and 10.

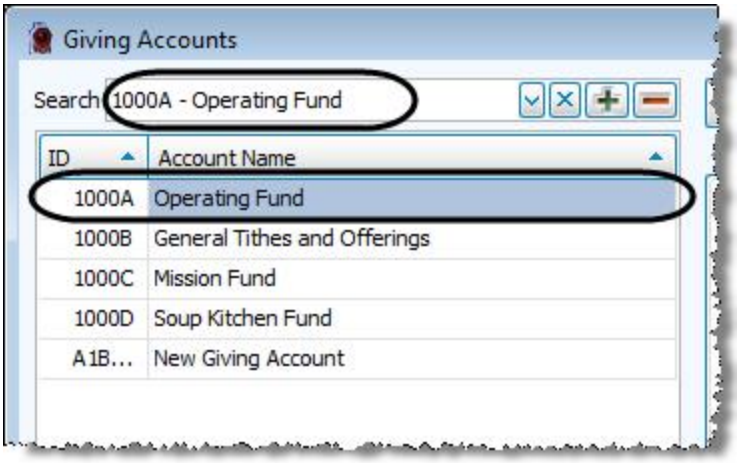
When you are finished, click the **X** in the upper right corner of the **Giving Accounts** screen.

Change and/or View Giving Account

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Manage Accounts** button from the options that appear underneath.

3. In the **Search** box, type the name or number of the account whose information you need to change and press the **ENTER** key on the keyboard.



The full number and name of the account will appear in the Search box and will be selected in the list below.

> **Note:**
>
> *If you find it easier to scroll to the account, you can browse the list and click it when you find it.*

4. With the desired account selected on the left side, look at the right side of the screen and make sure that it contains the same information as the selected account.

5. On the right side of the screen, make any or all of the following selections:

   - **Print on statement:**
     If you want the account to appear on Donation Statements *(pg 248)* for each Giver that will be making donations and/or pledges to it, make sure that a checkmark is placed in this box. If you do not place a check in this box, the account will **not** appear on any statement.

- **Inactive:**
  Place a check in this box to hide the account from the **Enter Donations** *(pg 29)* screen. You might find this useful if, for example, you set up the account at one point in time, but plan to use it at a later time. Or, you might find this useful if you have finished using the account and do not want further donations to be entered towards it.

- **Comments:**
  Place any additional information about this account. For example, if you place information about the account you can have it available for reference and understanding at a later time.

- **Giving Is Tax Deductible:**
  If you or your Church have determined that the money that is being collected from donations is to appear as an amount that is tax deductible on the statement of the Giver, check this box.

- **Pledgeable Account:**
  If you want to make this account keep track of pledges, as well as giving, make sure that a checkmark is placed in this box. If you do not place a check in this box, the account will **not** appear on the **Pledges** *(pg 98)* screen.

- **Frequency:**
  If your Church has determined that anyone who makes a pledge to this account is required to make the pledge to make a donation at only one certain frequency, click the dropdown box and choose the desired frequency.

If you have any further changes you would like to make to any accounts in the Giving Accounts screen, repeat these instructions. When you are finished, click the **X** in the upper right corner of the **Giving Accounts** screen.

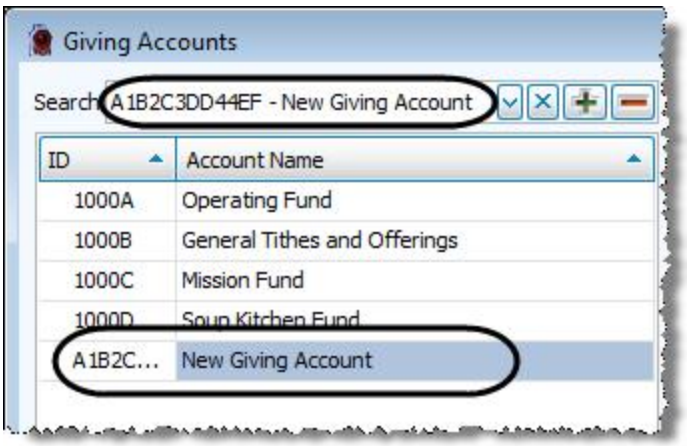
Delete a Giving Account

Use the following instructions to remove an account that you no longer need for donations and/or pledges to your Church.

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Manage Accounts** button from the options that appear underneath.

3. In the **Search** box, type the name or number of the account whose information you need to change and press the **ENTER** key on the keyboard.



The full number and name of the account will appear in the Search box and will be selected in the list below.

> **Note:**
>
> *If you find it easier to scroll to the account, you can browse the list and click it when you find it.*

4. With the desired account selected on the left side, look at the right side of the screen and make sure that it contains the same information as the selected account.

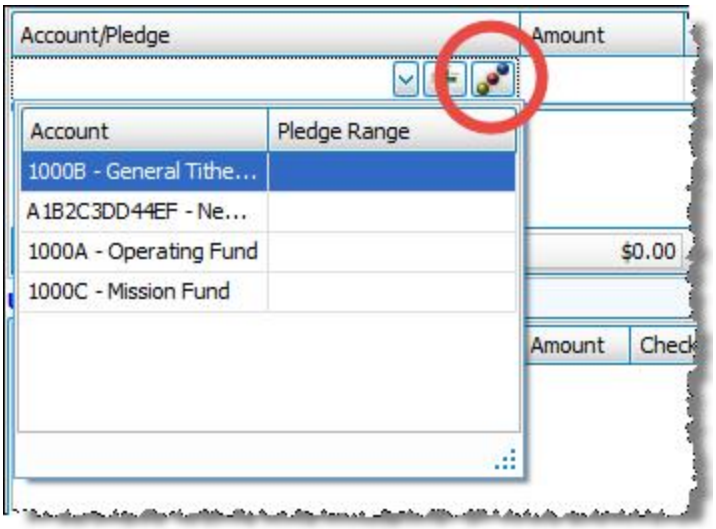
5. On the right side of the screen below the account name, a tab labeled **Detail** will display the current settings for the account.

6. Click the **Delete** button at the bottom of the Detail tab.

If you have any further changes you would like to make to any accounts in the Giving Accounts screen, repeat these instructions. When you are finished, click the **X** in the upper right corner of the **Giving Accounts** screen.

Order Giving Accounts

When you **Enter Donations** *(pg 29)*, you have the option of making certain giving accounts appear towards the top of the **Account / Pledge** box. The **Giving Account Order** screen sets the order of appearance in which the accounts appear when the **Accounts / Pledges** *(pg 98)* dropdown is expanded.

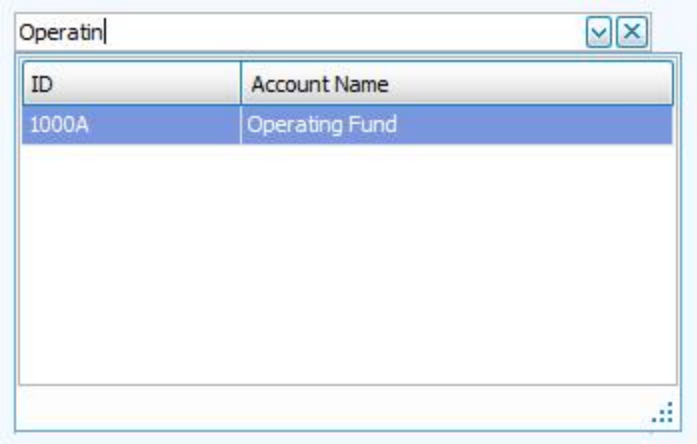


To access the **Giving Account Order** screen, either click the button in the **Enter Donations** *(pg 29)* screen OR:

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Order Accounts** button from the options that appear underneath.

The **Giving Account Order** screen appears with the list of accounts in the current order. If you need to locate an account without scrolling to it in the list, enter the name or number in the search box at the top of the screen until the name appears.



Note:

You might see more accounts in this list than you would when entering donations. This means that some of the accounts have been marked as "Inactive" in the **Manage Accounts** *(pg 85)**, which hides them from the* **Enter Donations** *(pg 29)* *screen.*

There are several ways that you can organize the accounts in the list:

Sort by Name

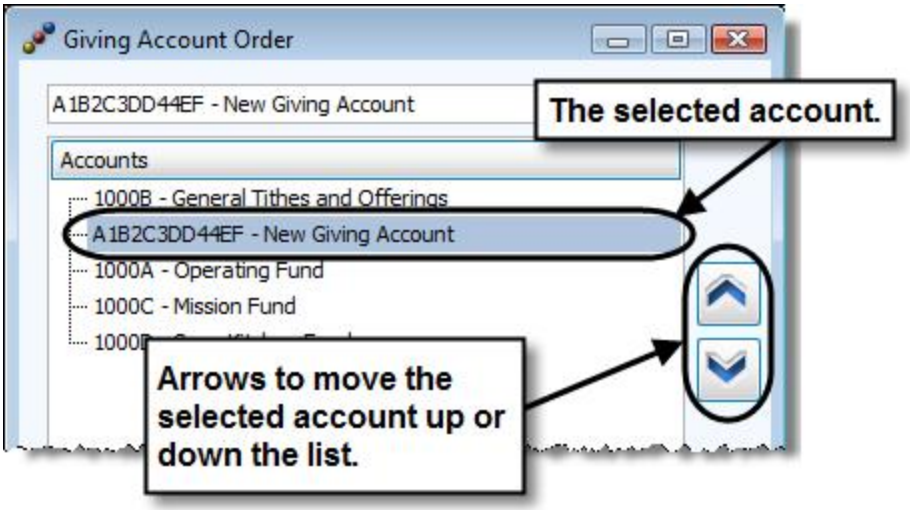
If you want the accounts to be in alphabetical order by account name, click the **Sort by Name** button.

Sort by Number

If you want the accounts to be in numerical order by account number, click the **Sort by Number** button.

Select the Account and Use the Up and Down Arrows

You can click the desired account once in order to select it. Then use the up and down arrows along the right side of the list of giving accounts to move the account in the desired direction.



When you are finished, click the **OK** button at the bottom of the screen.

Pledges

The **View and** Enter Pledges *(pg 101)* screen keeps track of the pledge information for potential and definite Givers and the pledge campaigns, towards which they set a goal to donate an amount of money within set time frames. Use the **View and Enter Pledges** screen to work with all that involves pledge campaigns and its participants.

To access the View and Enter Pledges screen:

- From The Initial Portal of Church Windows choose **Donations** and then either:

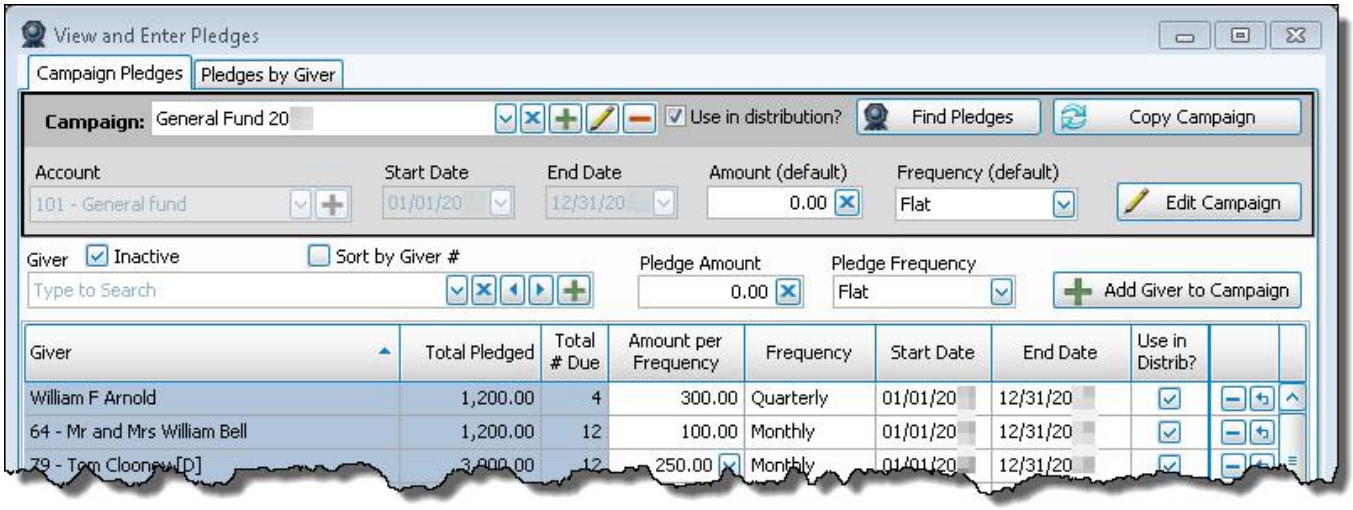
  1. Click the blue ribbon button in the box of **Quick Access Buttons**:

OR

2. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

- Then from the menu options that appear underneath, click **Pledges** button

- This will open the **View and Enter Pledges** screen:



- This screen is separated into two tabs:

Campaign Pledges

Use this tab to look up your Church's pledge campaigns to see the campaign information. Along with the campaign information, the list of the campaign participants will also be available for you to view and adjust as needed.

Add a New Campaign

When a new campaign is to take place at your Church, you can set it up with any necessary initial information before you add Givers to the campaign.

Add Givers to an Existing Campaign

Once a campaign is set up, you can add names of anyone making a pledge towards the campaign.

Change or Remove the Campaign Information

Make changes to campaigns that already exist, or even removing a desired campaign when you have determined necessary.

Copy a Campaign

Use the same characteristics of an existing campaign to create another campaign.

Pledges by Giver

Use this tab to look up pledge information for participants in your Church's pledge campaigns. Once the information is pulled up on the screen, you will be able to add new pledges for the pledge participants and make changes to any of their existing pledge information.

Enter Pledges

If an individual or group is making a pledge to give a certain amount of money to a purpose at your Church, you must enter it into the software.

Change and/or Remove Pledge Information

Make changes to pledges that already exist for specific Givers, or even remove a desired pledge when you have determined necessary.

Enter Pledges

When an individual or group has pledged to donate money for purposes and campaigns at your Church, use these instructions to add the pledging information on the **View and Enter** Pledges *(pg 98)* screen.

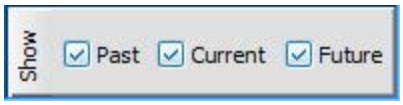
To access the Enter Pledges screen:

- From The Initial Portal of Church Windows choose **Donations**
- Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

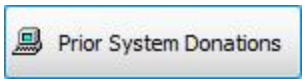
- From the menu options that appear underneath, click **Pledges** to enter the screen.

- If using the **Campaign Pledges** *(pg 100)* tab:
  - Choose the Campaign or **Add a New Campaign** *(pg 111)*.
  - Click the **Find Pledges** button if you have previously added pledges for individual or group Givers that are related to, or should be included in, the selected Campaign.

- If using the **Pledges by Giver** *(pg 101)* tab:
  - The **Show** boxes give you the option to show or hide past, present, and/or future pledges listed on the record of the chosen individual or group.



  - If you would like the **View and Enter Pledges** screen to show only certain pledge information, remove the ☑ checkmark from the desired box.
  - Otherwise, leave the box with a ☑ checkmark inside it to include the contents that the box is meant to display.
  - Click the **Prior System Donations** *(pg 124)* box if the individual or group Giver made a donation prior to when your Church started using the **Donations** Module.



- **Giver**

Look up the name of the desired individual or group.

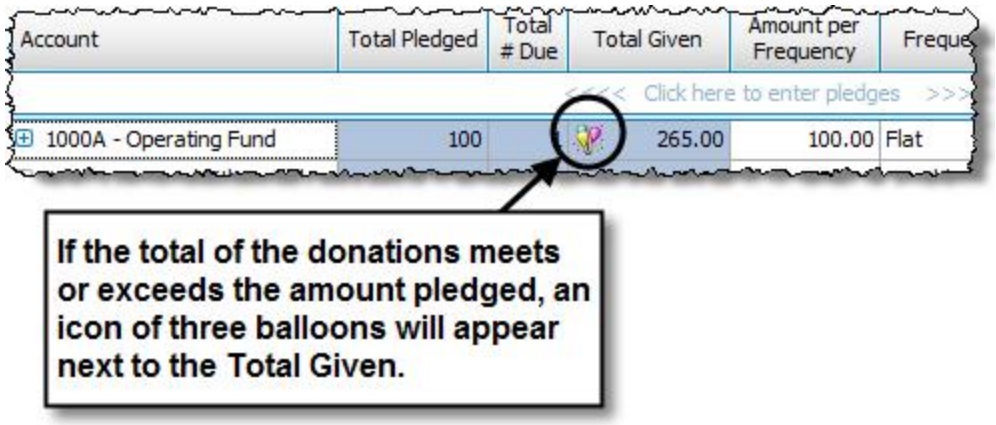
  - The name that appears in the box when first opening to the screen is the first record of all individuals and groups of people entered in the software.
  - Start typing the name you are searching, or click the ☑ dropdown button.
  - You can also use the ◀**Previous** and ▶**Next** buttons to pull up a record for an individual or group that follows in sequence.
  - Placing a ☑ checkmark in the **Sequence by Giver Number** box, changes the sequence so that when you click the ◀**Previous** and ▶**Next** buttons, the names show up in order by Giver Number.

- In the larger portion of the **View and Enter Pledges** screen is a list of any pledges made by the selected individual or group or towards the selected campaign (depending which tab you are using).

Note:

When the total amount of money donated towards the pledge equals or exceeds the total amount pledged, a balloon icon appears next to the

Total Given:



- To enter pledges, click the first available line that is labeled:
  <<<< Click here to enter pledges >>>>

- The line will then be ready for you to enter the pledge information for the individual or group. Enter the information for the following six items:

Account

The name of the giving account. Click the dropdown button and select an account. If you have determined that you must Add an Account (pg 86), click the **Add** button and add the new account.

Amount per Frequency

The dollar amount that the individual or group has declared to pledge at the frequency selected from the **Frequency** box. (NOT the total amount of the entire pledge.)

Frequency

How often the individual or group foresees giving the Church money. This selection determines the "Due-by Date" of each pledge. The choices are:

- **Flat** — due once on the first day of the campaign, use for one year pledges
- **Annual** — due once on the last day of each year of the campaign, use for multi-year pledges

> **Note:**
>
> ***Annual*** *pledges will only show up on* *Donation Statements* *(pg 248)* *for the entire year, but not on partial year statements; try using* ***Flat*** *instead for a single year campaign.*

- **Semi-Annual** — due once every 6 months
- **Quarterly** — due at the end of each quarter
- **Monthly** — due once each month
- **Semi-Monthly** — due twice per month
- **Bi-Weekly** — due every other week
- **Weekly** — due each week

> **Note:**
>
> *Check the "**Week day for weekly pledges**" in Donations Settings (pg 297) if you are seeing 53 weeks instead of 52 which happens during or after a leap year.*

Start Date

The beginning of the period in time that the individual or group is participating in the pledge to give towards the account selected in the **Account** box.

> **Note:**
>
> *If you do not select a date from this box, the date on which the Pledge Campaign starts will appear by default.*

End Date

The end of the period in time that the individual or group is participating in the pledge to give towards the account selected in the **Account** box.

> **Note:**
>
> *If you do not select a date from this box, the date on which the Pledge Campaign starts will appear by default.*

Use in Distrib?

Place a checkmark in this box if you would like to have the pledge be applied toward the Giving Distribution (pg 46) used when entering **Donations** on the Enter Donations (pg 29) screen.

Review the fields once finished to verify that the information you have entered is correct.

- Then, notice that the rest of the fields will contain additional information about the pledge which is automatically calculated automatically:

Total Pledged	When you make a choice from the **Frequency** and **Amount per Frequency** boxes, the software takes the dollar amount listed in the **Amount per Frequency** box and multiplies it by the number listed in the **Total # Due** box.
Total # Due	The total number of donations the individual or group will contribute to reach their pledge, based on the **Frequency**and the **Start and End Dates** of their pledge.
Total Given	The dollar amount that the individual or group has already given towards their **Total Pledged**.

If there is more pledge information to be added for the individual or group, press the **Add** button and repeat for each Giver until you are finished.

If you would like to remove any lines from the pledge information you have added, press the **Delete** button. If you would like to undo the change to the line, press the **Undo** button.

Change and/or Remove Pledge(s)

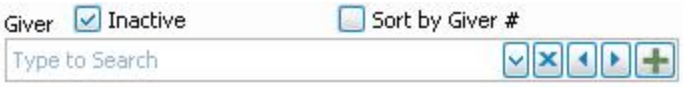
Use the following instructions to change or remove any information for any individual or group who already has pledge information entries. Use the **View and Enter** Pledges *(pg 98)* screen to carry out these instructions.

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. From the menu options that appear underneath, click **Pledges** to enter the screen

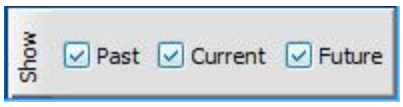
3. Click on the **Pledges by Giver** tab

4. From the **Giver** box, look up the name of the desired individual or group:



- The name that appears in the box when first opening to the screen is the first record of all individuals and groups of people entered in the software.
- Start typing the name you are searching, or click the dropdown button.
- You can also use the **Previous** and **Next** buttons to pull up a record for an individual or group that follows in sequence.
- Placing a checkmark in the **Sequence by Giver Number** box, changes the sequence so that when you click the **Previous** and **Next** buttons, the names show up in order by Giver Number.

5. The **Show** boxes give you the option to show or hide past, present, and/or future pledges listed on the record of the chosen individual or group.



If you would like the **View and** Enter Pledges *(pg 101)* screen to show only certain pledge information, remove the ☑ checkmark from the desired box. Otherwise, leave the box with a ☑ checkmark inside it to include the contents that the box is meant to display.

6. Click the Prior System Donations *(pg 124)* box to see if the individual or group made a donation prior to when your Church started using the **Donations** Module.

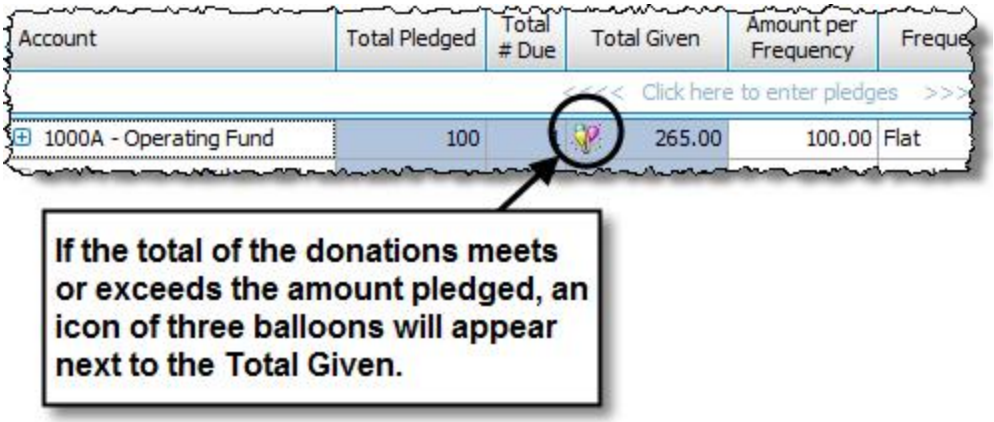
7. In the larger portion of the **View and Enter Pledges** screen is a list of any pledges made by the individual or group.

Account	Total Pledged	Total # Due	Total Given	Amount per Frequency	Frequency	Start Date	End Date	Use in Distrib?
<<<< Click here to enter pledges >>>>								
1000A - Operating Fund	100	1	265.00	100.00	Flat	01/01/2010	12/31/2010	☑
A1B2C3DD44EF - New Givi...	6000	12	15.00	500.00	Monthly	01/01/2010	12/31/2010	☑

Note:

When the total amount of money donated towards the pledge equals or exceeds the total amount pledged, a balloon icon appears next to the

Total Given:

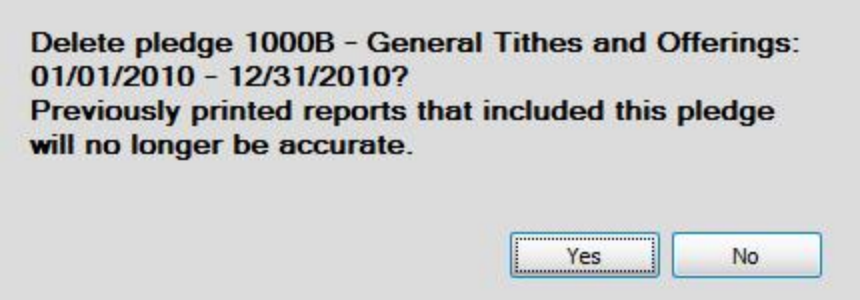


8. Choose one of the following options:

   - **To change existing information:**
     Click any of the boxes to change the Pledge Information Fields. When finished, press the **ENTER** key on the keyboard. If you would like to undo the change to the line, press the **Undo** button.

   - **To add new information:**
     Click the first available line that is labeled:
     <<<< Click here to enter pledges >>>>
     The line will then be ready for you to **Enter Pledges** *(pg 101)* for the individual or group by filling out the Pledge Information Fields.

   - **To remove existing information:**
     Click the **Delete** button of the line that you want to remove and a message like the following will appear:



     Keep in mind, the entry you are about to delete is an influence on previously printed reports that contain any kind of pledge total(s) information. If the entry is deleted, new reports would have to be printed to maintain an accurate understanding between the people whose reports have been affected by this change. If you are sure that the line must be deleted, click the **Yes** button to proceed.

Add a New Campaign

Use the **Campaign Pledges** *(pg 100)* tab of the **View and Enter Pledges** screen to enter into the software a new pledge campaign. When your Church decides that it will be accepting pledges that are aimed toward a purpose for which your Church is raising money, you can add the information for the pledge campaign and any or all of its Givers in this area of the software.

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. From the menu options that appear underneath, click **Pledges** to enter the screen.

3. Click the **Campaign Pledges** *(pg 100)* tab.

4. Click the **Add** button.

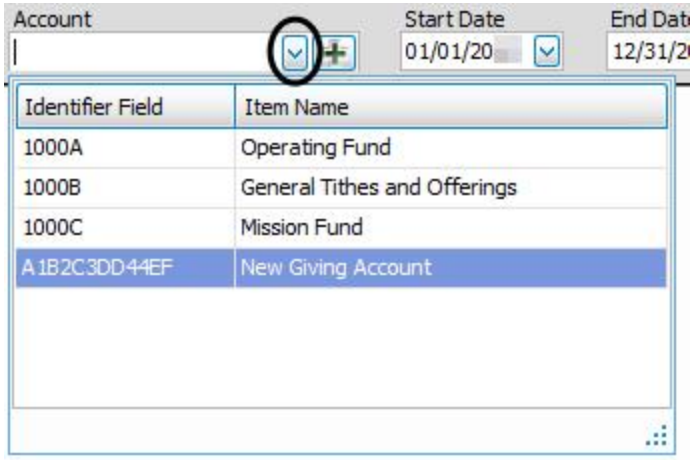
5. Enter the new Campaign name and click the **OK** button.

6. Automatically, a checkmark will be placed for you in the **Use in distribution? (default)** box.

This means that the money that the Givers are pledging toward this campaign will be calculated into the total donation amount. This takes place on the **Enter Donations** *(pg 29)* screen and is called the **Giving Distribution** *(pg 46)* which can also be adjusted manually.

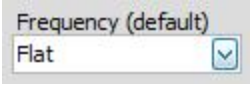
If you remove the checkmark, the pledge amounts will not affect the way donations are automatically distributed between accounts when they are entered on the **Enter Donations** *(pg 29)* screen.

7. **Account**
Click the dropdown button and choose the account for the campaign.



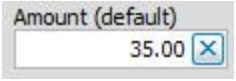
8. Click the dropdown button of the **Start Date** box and select the date on which the campaign begins. Then click the dropdown button of the **End Date** box and select the date on which the campaign ends.

9. **Frequency (default)**
   If the majority of the people pledging towards this campaign set out to make the pledge at a common frequency, click the dropdown button of the box and choose that frequency.



   Choosing a default from this box means that when you **Add Givers to a Campaign** *(pg 114)*, the frequency for each Giver will already be filled in with whatever was initially selected in this box, though you can still change it if needed. If you are not sure, you can leave this box empty and move on to the next step.

10. **Amount (default)**
    Enter an amount in the box if there is a standard amount that will apply towards most of the Givers of this campaign.



    Choosing a default from this box means that when you **Add Givers to a Campaign** *(pg 114)*, the amount for each Giver will already be filled in with whatever was initially selected in this box. If you are not sure, leave this box as is and move on to the next step.

11. **Add Givers**
    Click the 

button to begin to **Add Givers to a Campaign** *(pg 114)*.

The screen will automatically save each change as you go. And when you are finished, just close the **View and Enter Pledges** screen.

Add Givers to a Campaign

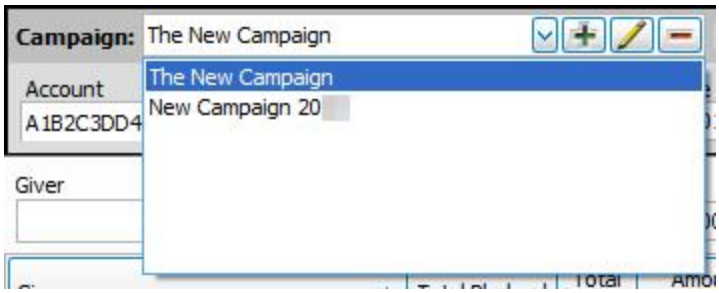
Once you **Add a New Campaign** *(pg 111)*, you can begin to add individuals and/or groups who plan to donate money for the campaign following the instructions below:

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

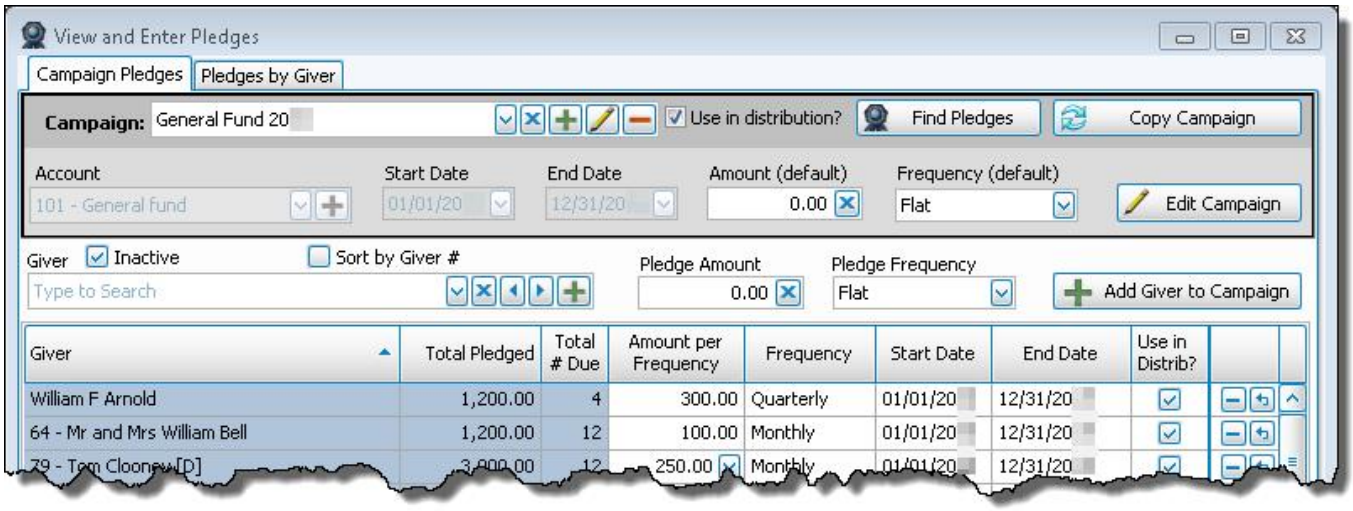
2. From the menu options that appear underneath, click **Pledges** to enter the screen.

3. Click the **Campaign Pledges** *(pg 100)* tab.

4. **Campaign**
   Click the dropdown button and select the desired campaign:



The larger portion of the screen will show you the completed Pledge Information Fields of the individuals and groups already participating in the pledge campaign (new campaigns will be blank until you add Givers):



5. **Giver**
   Select the name of the Giver by either typing the name in the box, or using the dropdown button to find the name.

> **Note:**
>
> *If the desired Giver name does not appear in the dropdown box and you have determined that you must* ***Add Givers*** *(pg 144), click the button to do so.*

6. **Total Pledged, Total # Due, and Total Given**
   These fields have a blue background because they are automatically calculated for you by Church Windows, you can only typw in the boxes with a white background.

7. **Amount per Frequency**
   Enter the dollar amount that the Giver has pledged to give towards this campaign based on the number of times they are going to give (the Frequency, selected next).

8. **Pledge Frequency**

   How often the individual or group foresees giving the Church money. This selection determines the "Due-by Date" of each pledge. The choices are:

   - **Flat** — due once on the first day of the campaign, use for one year pledges
   - **Annual** — due once on the last day of each year of the campaign, use for multi-year pledges

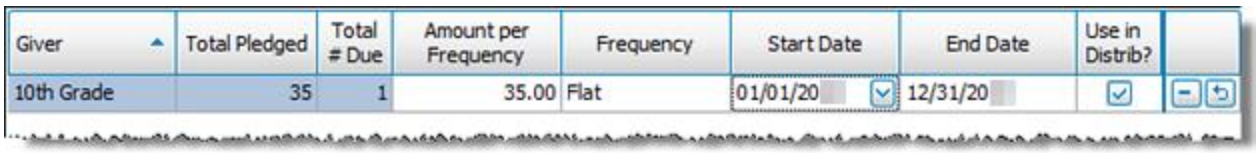
> **Note:**
>
> ***Annual*** *pledges will only show up on* ***Donation Statements*** *(pg 248)* *for the entire year, but not on partial year statements; try using* ***Flat*** *instead for a single year campaign.*

   - **Semi-Annual** — due once every 6 months
   - **Quarterly** — due at the end of each quarter
   - **Monthly** — due once each month
   - **Semi-Monthly** — due twice per month
   - **Bi-Weekly** — due every other week
   - **Weekly** — due each week

> **Note:**
>
> *Check the "****Week day for weekly pledges****" in* ***Donations Settings*** *(pg 297)* *if you are seeing 53 weeks instead of 52 which happens during or after a leap year.*

9. Click the **Add Giver to Campaign** button: 

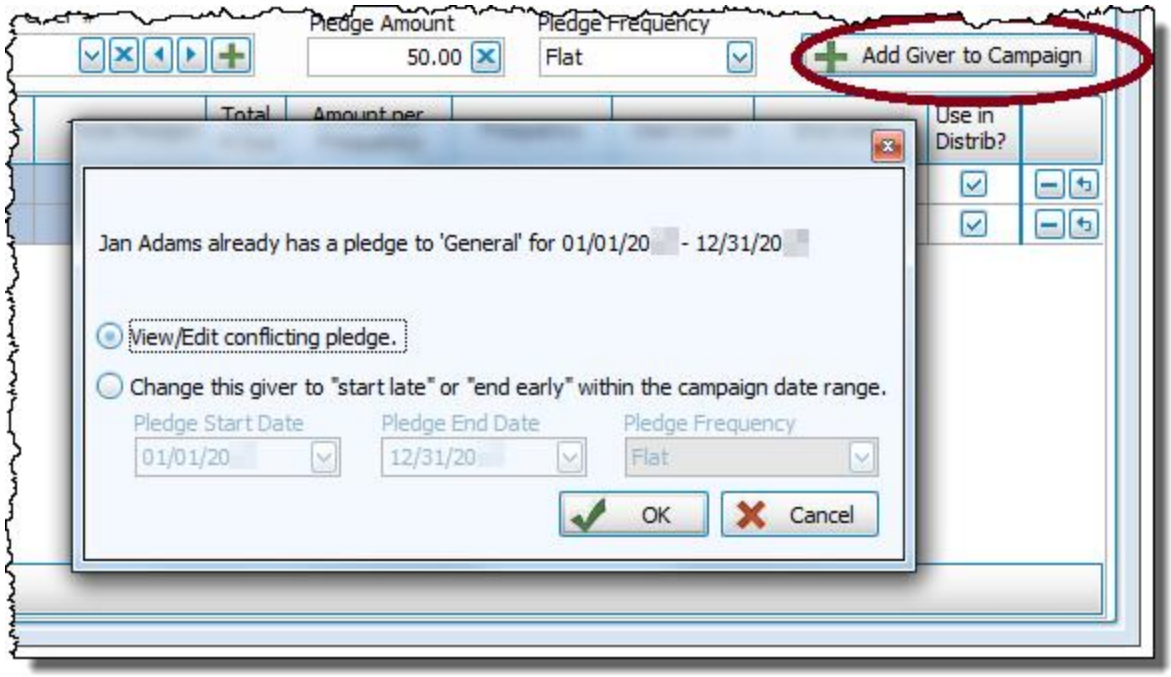
10. The larger portion of the screen will fill with information that you have selected, along with calculations that involve the pledge campaign:



The **Amount per Frequency**, **Frequency**, **Start Date**, **End Date**, and **Use in Distrib?** Pledge Information Fields can be changed. Changing them will then recalculate the **Total Pledged** and **Total # Due**.

Note:

If a Giver already has a pledge during the campaign, a message will popup warning that there are conflicting pledges and asking how you wish to proceed:



Repeat Steps 5-8 to add each individual or group making a pledge to the campaign.

The screen will automatically save each change as you go. And when you are finished, just close the **View and Enter Pledges** *(pg 98)* screen.

If you would like to remove any lines, press the **Delete** button. Also, if you make a change on the line and want to

reverse that change, click the **Undo** button.

Change or Remove Campaign Information

If you have already set up a campaign and need to adjust the list of pledging participants, or even change the campaign name, use the Campaign Pledges *(pg 100)* tab of the **View and Enter** Pledges *(pg 98)* screen to make the change. Then, use the following instructions.

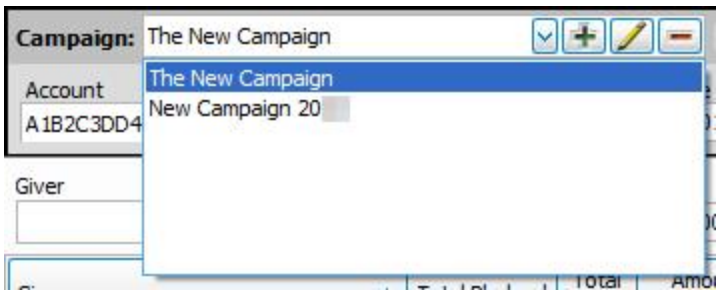
> **Note:**
>
> *Reports, Labels, and Statements (pg 191) printed before you change any of the pledge information will become outdated once you change pledge information. Be aware that you might need to re-print Donation Statements (pg 248) and/or reports to reflect the changes after making them.*

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. From the menu options that appear underneath, click **Pledges** to enter the screen.

3. Click the **Campaign Pledges** tab.

4. Click the dropdown button of the **Campaign** box and select the desired name.



In the larger portion of the screen, you have the option to change pledge information for any individual or group. You can only change the **Amount Per Frequency**, **Frequency**, **Start Date**, **End Date**, and **Use in Distrib?** Pledge Information Fields. When you make the change, the other fields on the line will be affected according to the changes that you make.

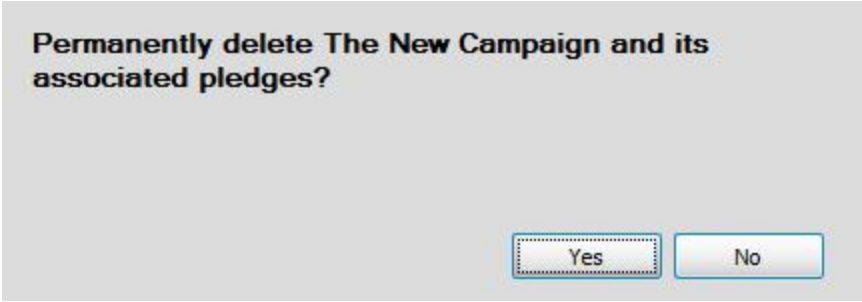
5. If you have determined that you either want to change the name of the campaign to something else, or delete the campaign altogether, see the following options:

Change the Campaign Name

Click the **Edit** button and type the name to which you need to change the campaign. When finished, press the **OK** button.

Remove the Campaign

Click the **Delete** button. The following message will appear:

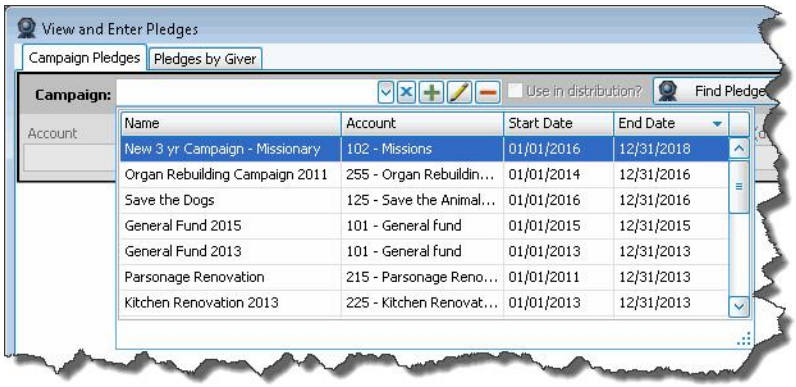


Click **Yes** to proceed with the deletion of the campaign. Otherwise, click **No** to have the software make no changes to the campaign.

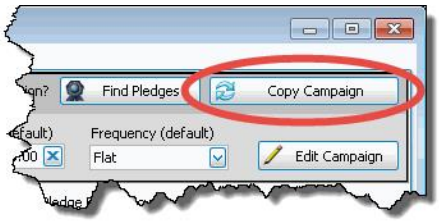
Copy a Campaign

Sometimes when someone wants to Add a New Campaign *(pg 111)*, they want to use the same characteristics of a campaign that already exists. If this is the case, use the **Copy Campaign** button on the Campaign Pledges *(pg 100)* tab of the **View and Enter** Pledges *(pg 98)* screen (click on **Accounts and Pledges**, then click on **Pledges**) to duplicate that information, and from there, you can change the information as you would like the new campaign to show it.

1. Select the campaign name from the **Campaign** dropdown box.



2. Click the **Copy Campaign** button at the far right.



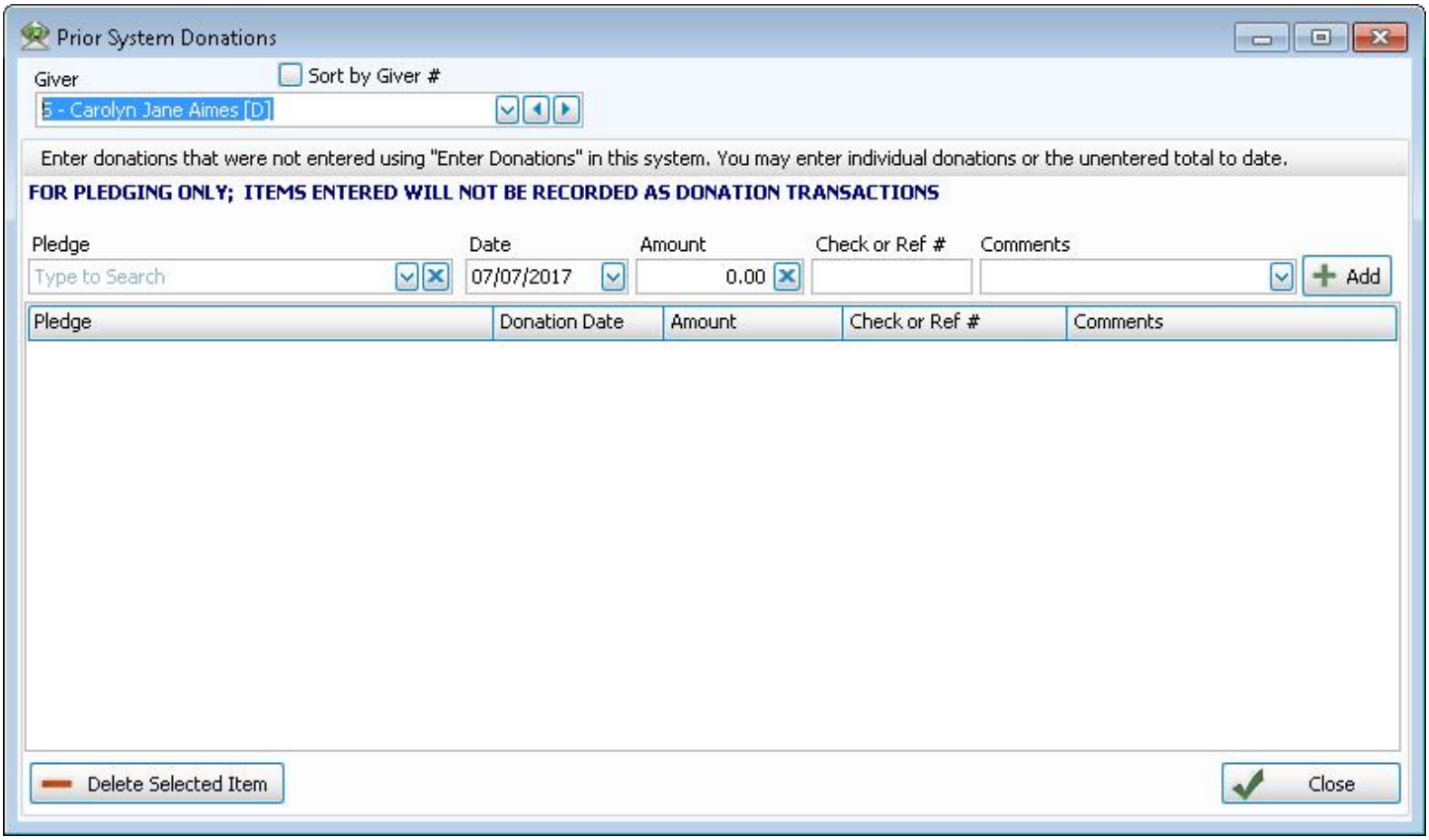
3. Type the name of the new campaign, and set the dates when it is to begin and end.

4. Click **OK** to save or **Cancel** to discard the copied campaign.

> **Note:**
>
> *If a Giver has more than one pledge on the campaign of which you chose to make a duplicate, the new campaign will contain only the most recent of the Giver's multiple pledges. Additionally, if a Giver already has a pledge during the campaign, a message will popup warning that the conflicting pledges will not be copied.*

Prior System Donations

If you are using **Donations** for the first time and have money that you would like to record as being donated towards a pledge that is currently running, enter the total donation amount and other information using the Prior System Donations screen as indicated in the following steps. The purpose of the Prior System Donations screen is to keep track of all the money donated to the pledge, which has so far been kept track of outside this software.



> **Note:**
>
> *Adding Prior System Donations ONLY impacts* **Pledges** *(pg 98). This function will allow the Giver to receive credit towards their pledge, however the donation(s) input here will not be entered into the overall Donations data and will not affect your account balances.*

Before you make entries on the Prior System Donations screen, make sure that the following items have already been set up:

1. **The name of each Giver**:
   On the Prior System Donations screen, you will be asked to select the name of a Giver. Be sure to go to the **Manage Givers** *(pg 133)* screen and review the names of the Givers whose donations you plan to add using the Prior System Donation screen and see if the name has been entered there. If the Giver name is not listed on the Manage Givers screen, you will have to determine whether or not you will have to add the name to the software.

2. **The pledge account:**
   The pledge towards which the Giver made the donation can be set up in the software as a giving account that accepts entries of money pledged. Moreover, in order for the account to show on the Prior System Donations screen, the account on the **Giving Accounts** screen must be marked as a **Pledgeable Account** in **Manage Accounts** *(pg 85)*.

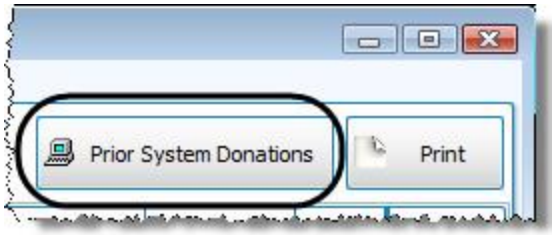
Once you have these two things in place, proceed with the following instructions.

To access the View and Enter Pledges *(pg 98)* screen:

1. Click **Accounts & Pledges** in the **Button Bar** at the top of the screen

2. Click the **Pledges** button from the menu options that appear underneath.

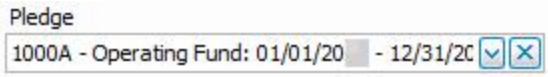
3. Click the **Prior System Donations** button in the top right area of the screen that appears.



4. **Giver**
   Click the dropdown button and choose the name of the individual or group who made the donation.

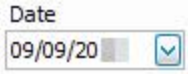
> **Note:**
>
> *If the name of the Giver that you are looking for does not appear in this box, you must click the plus button to* ***Add Givers*** *(pg 144) then enter the name and all contact information made available to you.*

5. **Pledge**
   Click the dropdown button and choose the name of the **Pledge account** towards which the Giver made the donation.

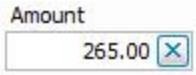


> **Note:**
>
> *If the name of the pledge account does not appear in this list, you must* ***Change and/or View Giving Account*** *(pg 90) to ensure it has the ability to keep track of pledges, as well as giving, by placing a checkmark in the* ***Pledgeable Account*** *box.*

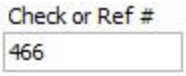
6. **Date**
   Enter the date that the donation took place.



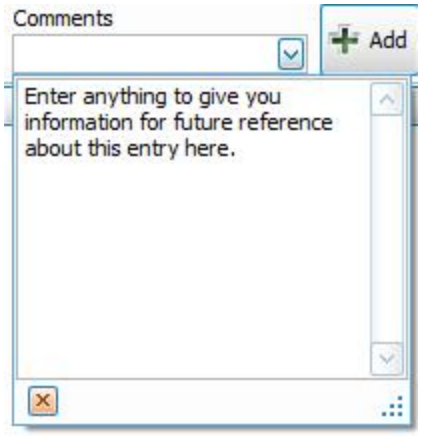
7. **Amount**
   Enter the total of the money given so far for the pledge.



8. **Check or Ref #**
   Enter any check or reference number made available to you (if any).

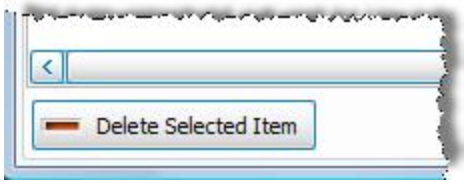


9. **Comments**
   Enter any additional information you wish.



10. Click the **+ Add** button and the entry will appear in the list below the button.

11. If you need to remove any lines, select the line and click the **Delete Selected Item** at the bottom of the screen.



12. If you need to add another pledge account for the same Giver, repeat Steps 5-11.

13. If there is another Giver for whom you would like to enter donations made outside this software, repeat Steps 4-11.

When you are finished using this screen, click the **Close** button in the bottom right corner of the screen.

The View and Enter **Pledges** *(pg 98)* screen will remain open in the background for you to make any changes you wish, or to close it.

Subtotals

By setting **Subtotals**, you can organize accounts so that they are grouped together to add up to a total specific to the grouped accounts. These **Subtotals** and the accounts that add up to the subtotal dollar amounts appear on the **List Account Balances** *(pg 224)* report.

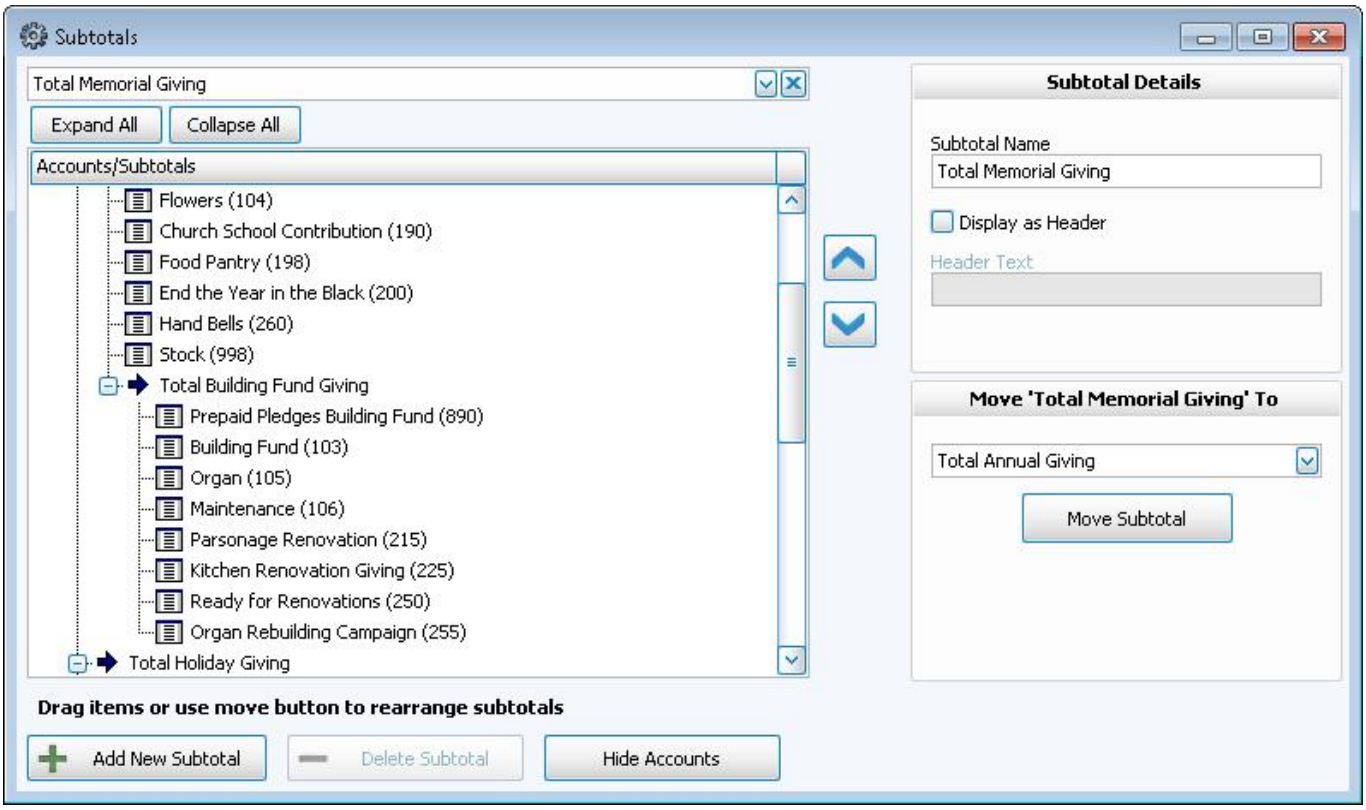
While the **List Account Balances** report shows the subtotals, the **Subtotals** screen provides you with a panel of settings to format how the report is going to print its subtotals.

To access the Subtotals screen:

1. From The Initial Portal of Church Windows choose **Donations**
2. Click the **Accounts & Pledges** *(pg 98)* option in the **Button Bar** at the top of the screen

3. Click the **Subtotals** button from the options that appear.

4. This will open the **Subtotals** screen:



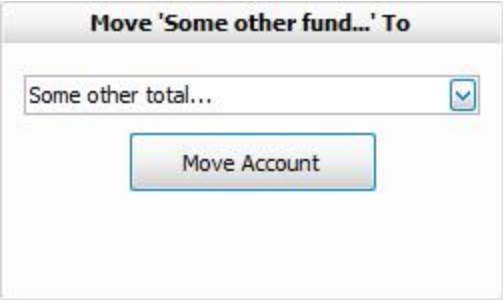
The list of **Accounts / Subtotals** always has in place a subtotal item that represents the total of all the subtotals you create that serves as a grand total. The subtotal item is originally called **Total Giving Accounts**, a name that you can change at any time. Click the **expand** button to the left of each row to view details (when expanded it will become a **collapse** button).

Working with Subtotals

Click the **Show Accounts** button at the bottom of the Accounts / Subtotals list to display the accounts entered in your Chart of Accounts Setup. When the accounts appear, you can click and drag them to existing subtotals, or put them into new subtotals you create.

To add a new subtotal item, click the **+ Add New Subtotal** item. After adding or choosing a subtotal, you can also use the up and down arrow buttons to box to move subtotals to different places. If the subtotal has nowhere to move, these options will be disabled. You can also click the account you want to move and select the desired destination

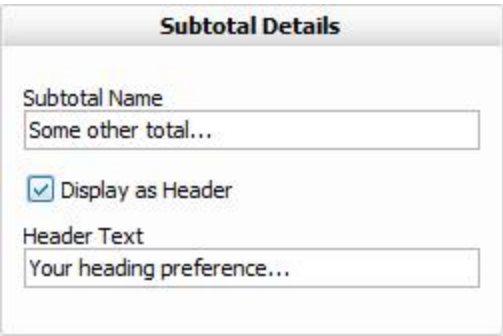
subtotal item from the "**Move '...' To**" box in the bottom right corner of the screen and click the **Move Account** button.



If you wish to delete a Subtotal at any time, make sure that the accounts that it contains have been moved to another subtotal. Then click the desired subtotal and click the — **Delete Subtotal** button.

Subtotal Names and Header Text

Use the **Subtotal Details** area in the upper right side of the Subtotals screen to give any subtotal selected in the Accounts / Subtotals list a name, and to optionally give it a heading name.



- **Subtotal Name:** Enter the desired name for your subtotal as you would like it to appear.
- **Display as Header:** If you would like text to be placed over the accounts that add up to the subtotal item, place a checkmark in this box.
- **Header Text**: If you placed a checkmark in Display as Header box, place the name you want the header to display in this box. This is the name that appears above the subtotal items.

To see how these items will appear on the report, go to the **List Account Balances** *(pg 224)* feature in Reports and run the report to see where these items are displaying. Come back to this screen to make any additional changes as you

wish.

Chapter 4 - Givers

Givers

These options let you **Manage Givers** *(pg 133)*, **Add Givers** *(pg 144)*, **Add a Group Giver** *(pg 148)*, **Transfer Donations** *(pg 149)*, as well as **Manage Giver Numbers** *(pg 156)* and **Auto Assign Giver Numbers** *(pg 168)*.

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.

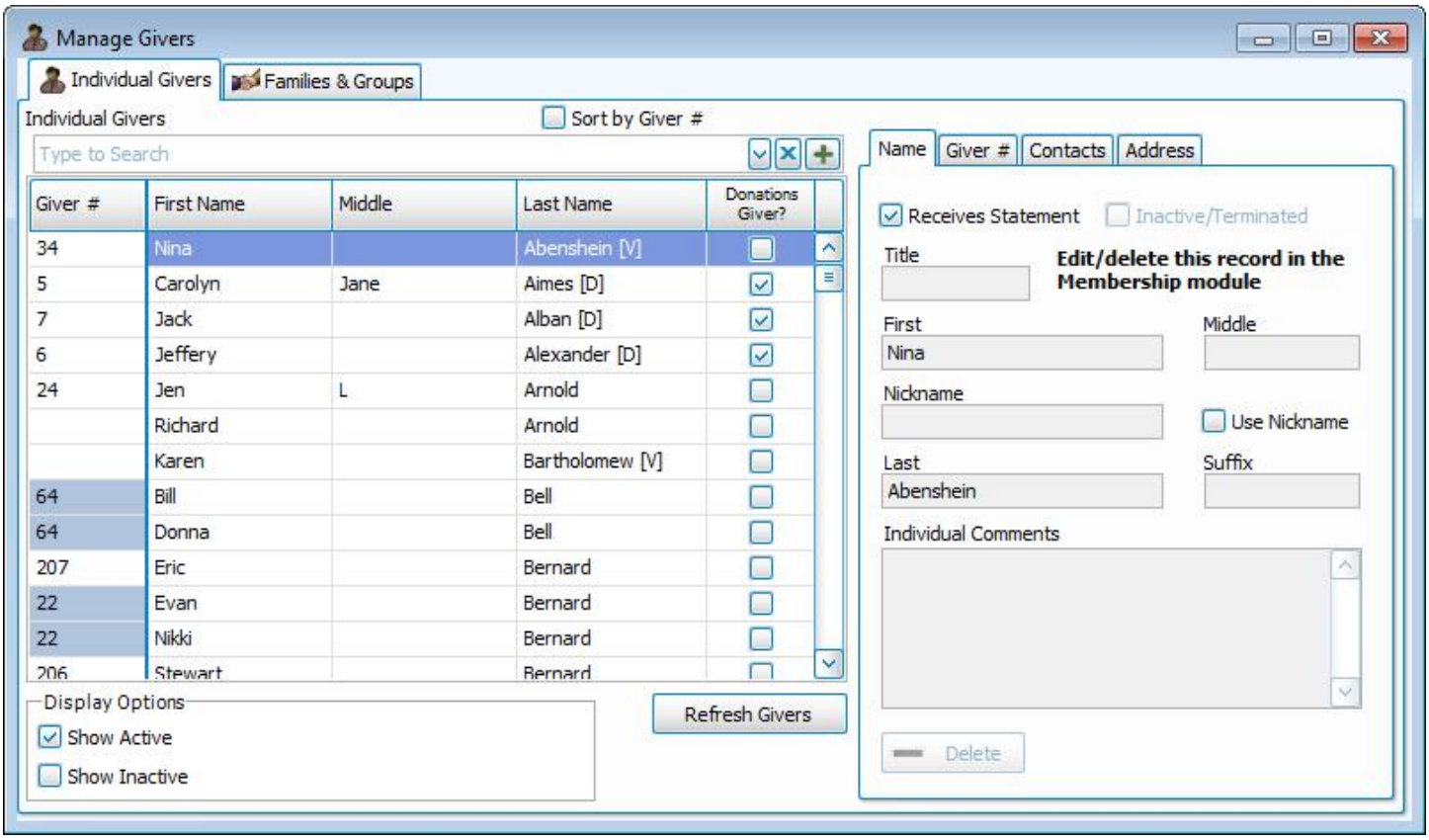
The **Manage Givers** screen can perform the following tasks for Givers and their information:

Add an Individual Giver or a Group of Givers

If a Giver is not found in the **Manage Givers** list, you can Add Givers *(pg 144)* 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 *(pg 162)*, change the status of **Inactive** for Donations Individual Givers *(pg 146)*, or see whether Membership Individual Givers *(pg 146)* 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 Module and any Givers entered through the **Donations** Module.*

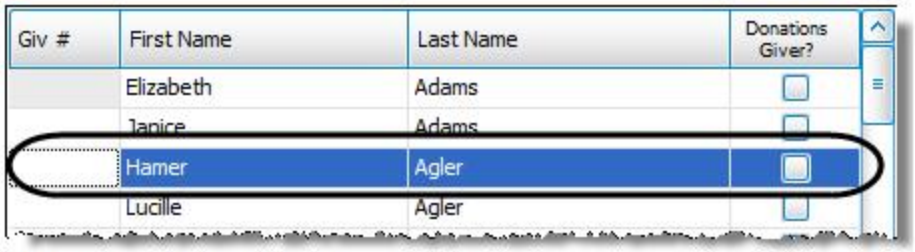
To access the Manage Givers screen:

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

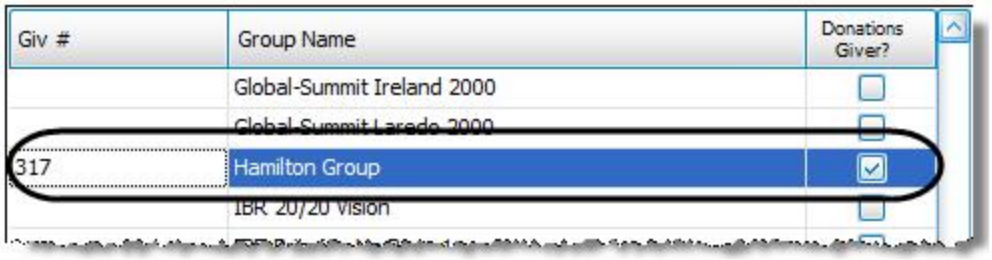
2. Click the **Manage Givers** button:

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.

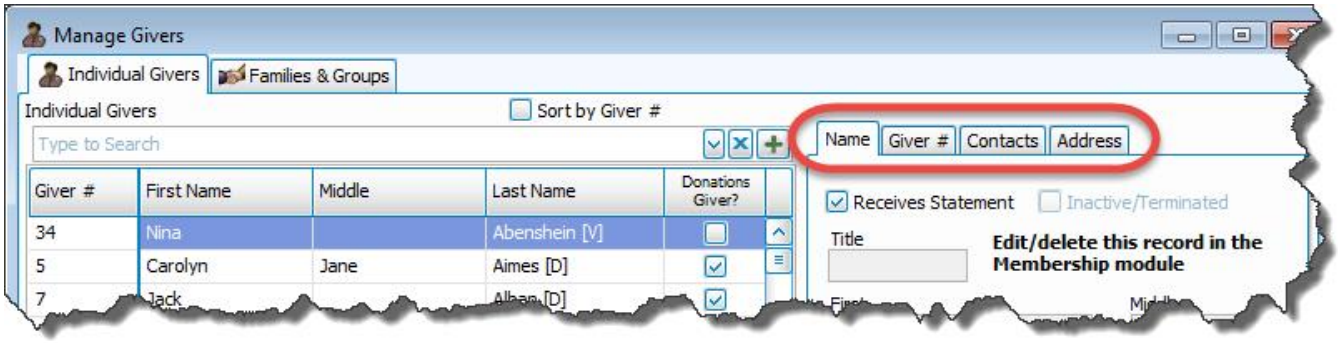


View of the Families & Groups tab contents.

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:

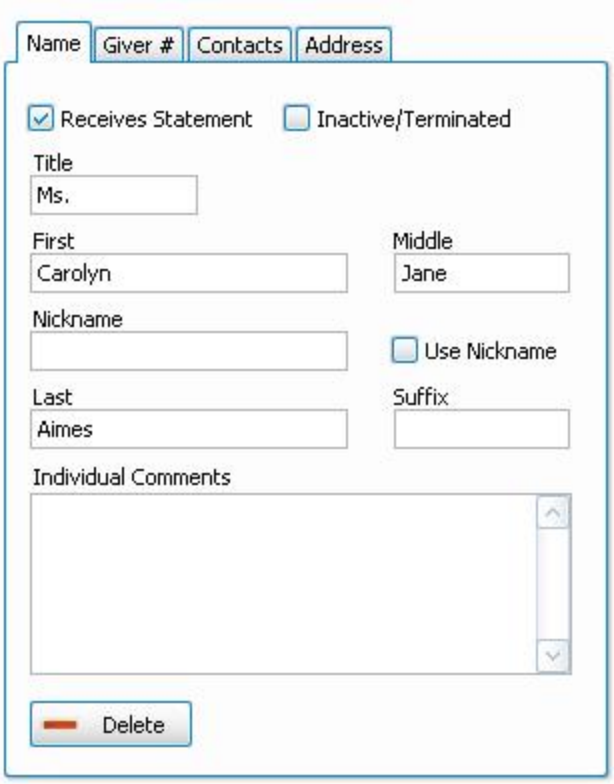
- **Giver #:** The Giver Number which is assigned to the Individual Giver, family, or group on the **Giver #** *(pg 139)* tab or in **Manage Giver Numbers** *(pg 156)*
- **First Name**: The first name of the Individual Giver.
- **Last Name**: The last name of the Individual Giver.
- **Donations Giver?**: 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** *(pg 146)* 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:

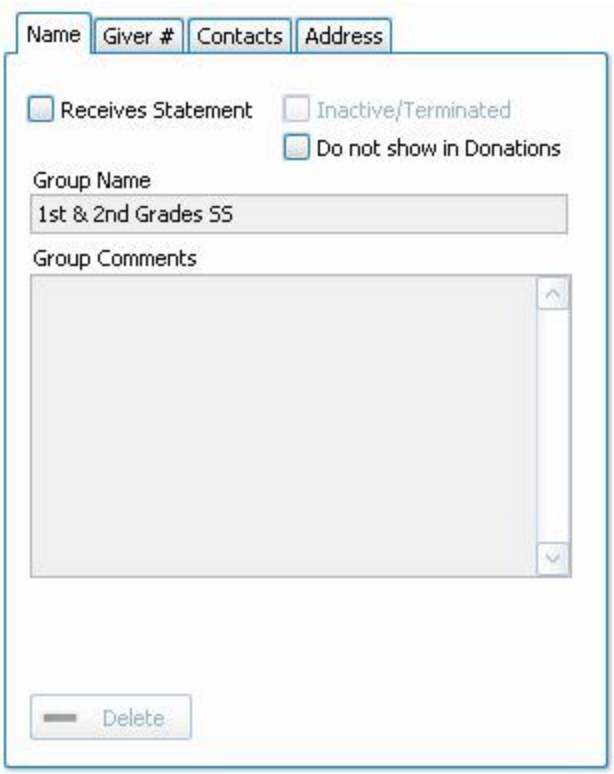


Name

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:

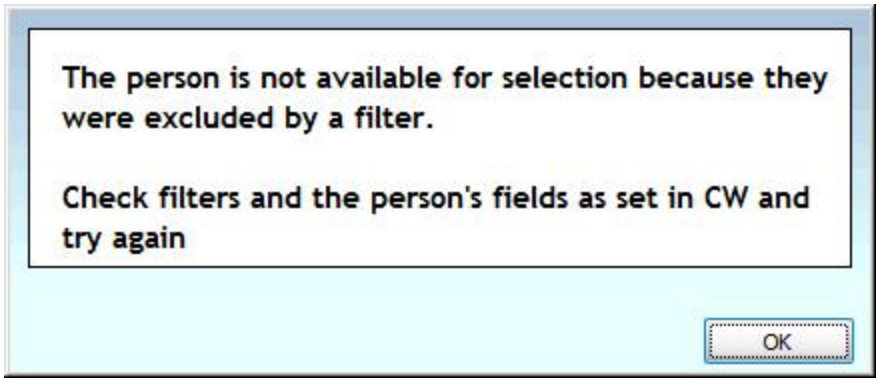


Here you can make changes to the following information:

- **Receives Statement**
  You must place a ☑ checkmark in this box if the selected Giver is supposed to receive **Donation Statements** *(pg 248)*. 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":

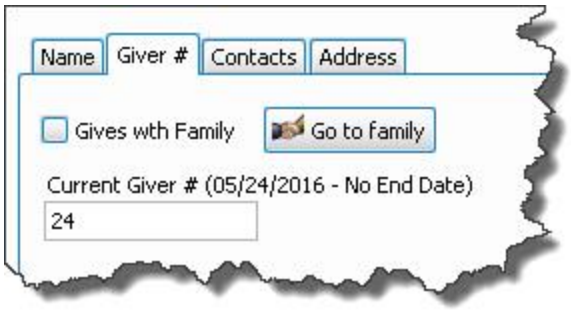


*The **Receives Statement** checkbox is almost always the filter the message is indicating.*

- **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 *(pg 146)*.
- **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 *(pg 146)*, 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

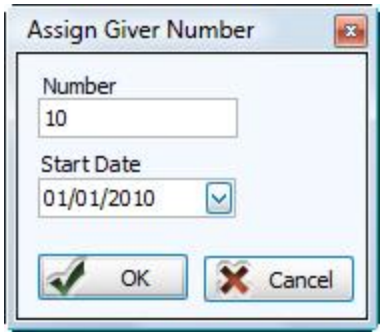
- Make sure that the ☑ checkmark from the **Gives with Family** box has been removed:

- 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.

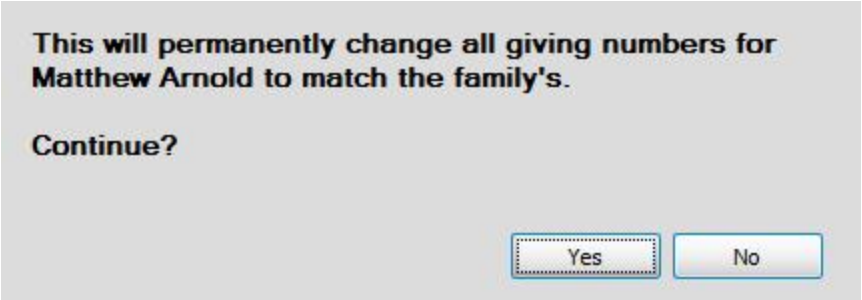
Giving with Family

- 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 Canada.

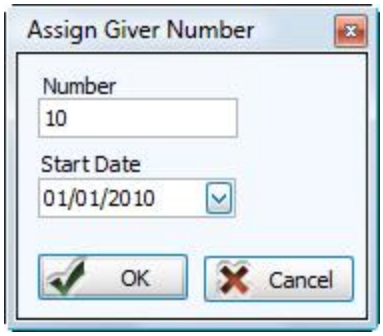
- The list on the left side of the **Manage Givers** *(pg 133)* screen will show a blue box for those Givers you have assigned as **Gives with Family** (and they will have the same Giver Number, if one is assigned).

- 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 *(pg 156)*
    - 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 133)*
    - 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.

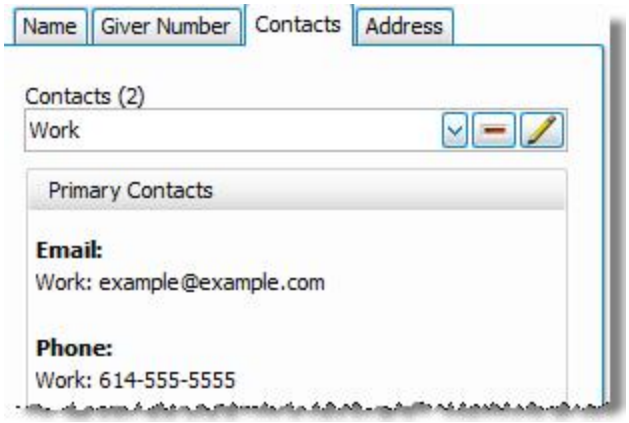
- **Current Giver #**
  Any number entered in this box will establish that the selected Giver will have this number until a further change is made. The date range for the number will be displayed as well.

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*** *(pg 191)* *for Givers without assigning them numbers.*

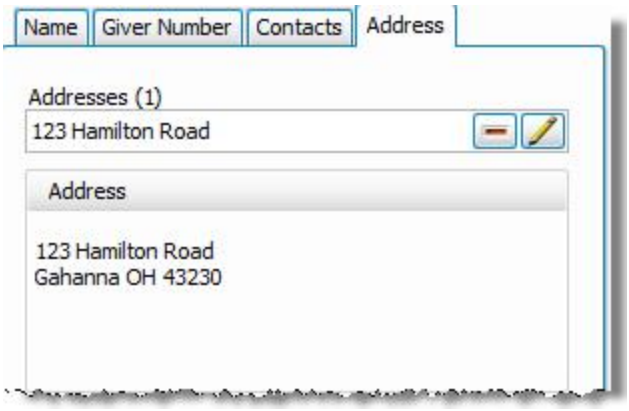
Contacts

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** *(pg 146). If the message below does not 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.*

Add Givers

The software provides you with two categories of Givers, under which you can specify whether you will **Enter Donations** *(pg 29)* from the Giver as an individual or as a group. The following instructions are separated into the two categories: Individuals and Groups.

- From The Initial Portal of Church Windows choose Donations
- Click the **Givers** option in the **Button Bar** at the top of the screen:

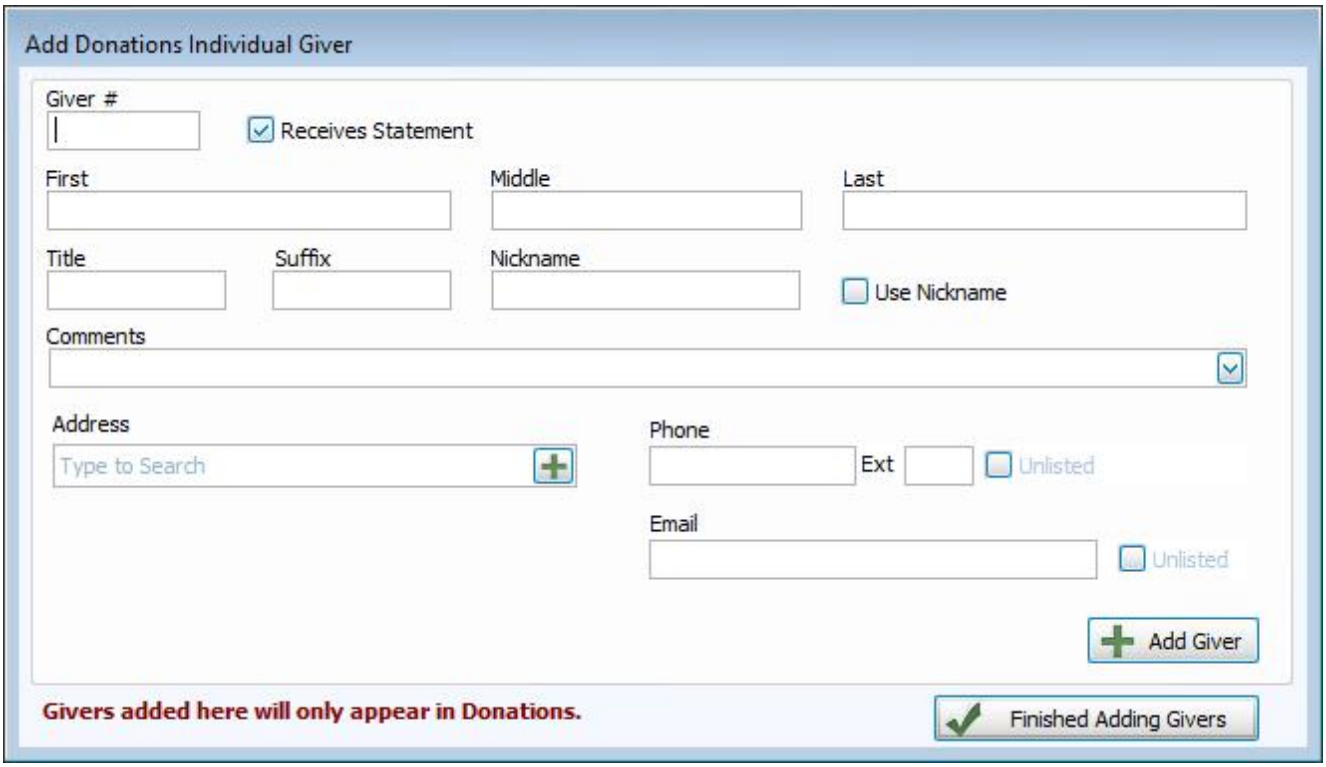
Add an Individual Giver

Add new contact information and Giving # (if needed) for a new individual who will be making **Pledges** *(pg 98)* and/or donations to your Church

- Click the **Add Individual** button and choose which type of Individual Giver you need to add:

- Depending on your choice to add either a **Donations** or a **Membership** Individual Giver, one of two screens will then open and you will perform the following actions:

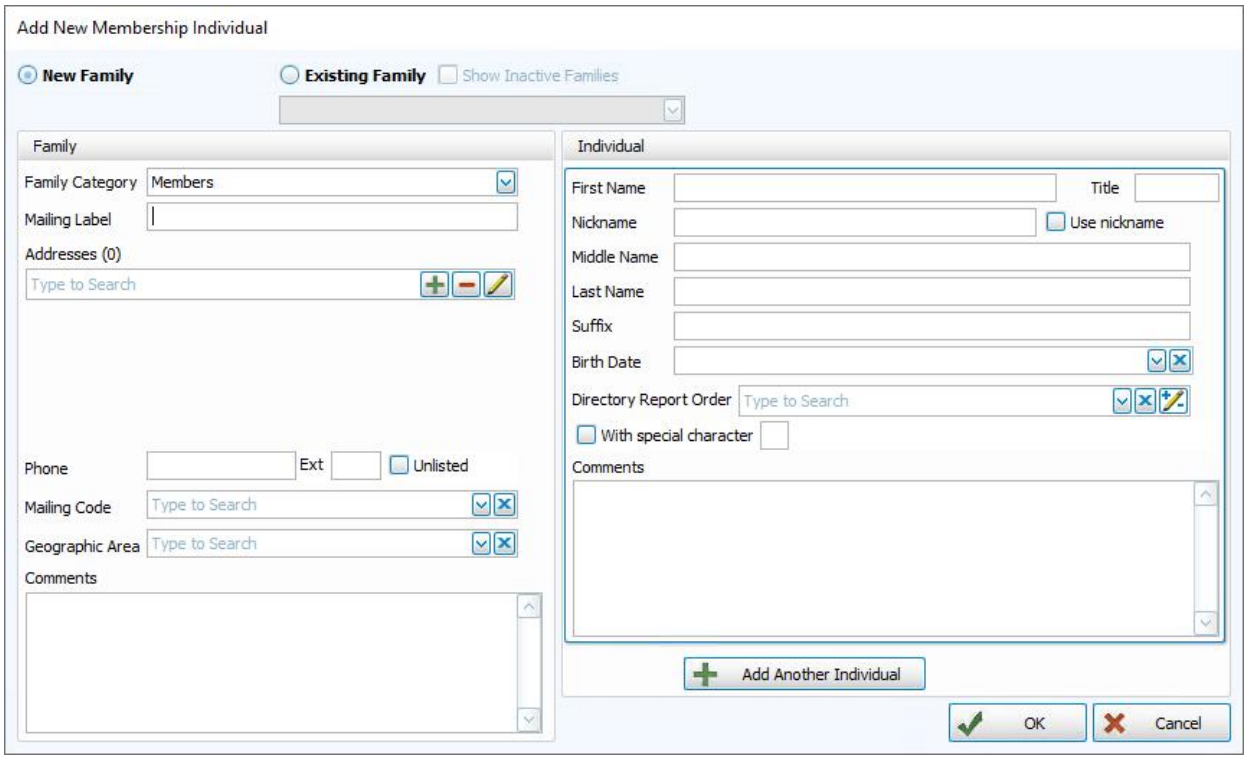
1. **Donations Individual Givers**



- **Donations Individuals** exist only in the **Donations** Module, they do not exist in The People File at all.
- Here you can add the Individual Giver information. Enter the information that pertains to the individuals in the fields provided.
- When finished, click **OK**.

OR

2. **Membership Individual Givers**



- If this person is *NOT* a member of any other family already in The People File:
  - Click the **New family** radio button to select it.
  - Select one of the **Family Categories** into which you want to enter the new person.
  - You may then type the family information into the left side of the screen.

  OR

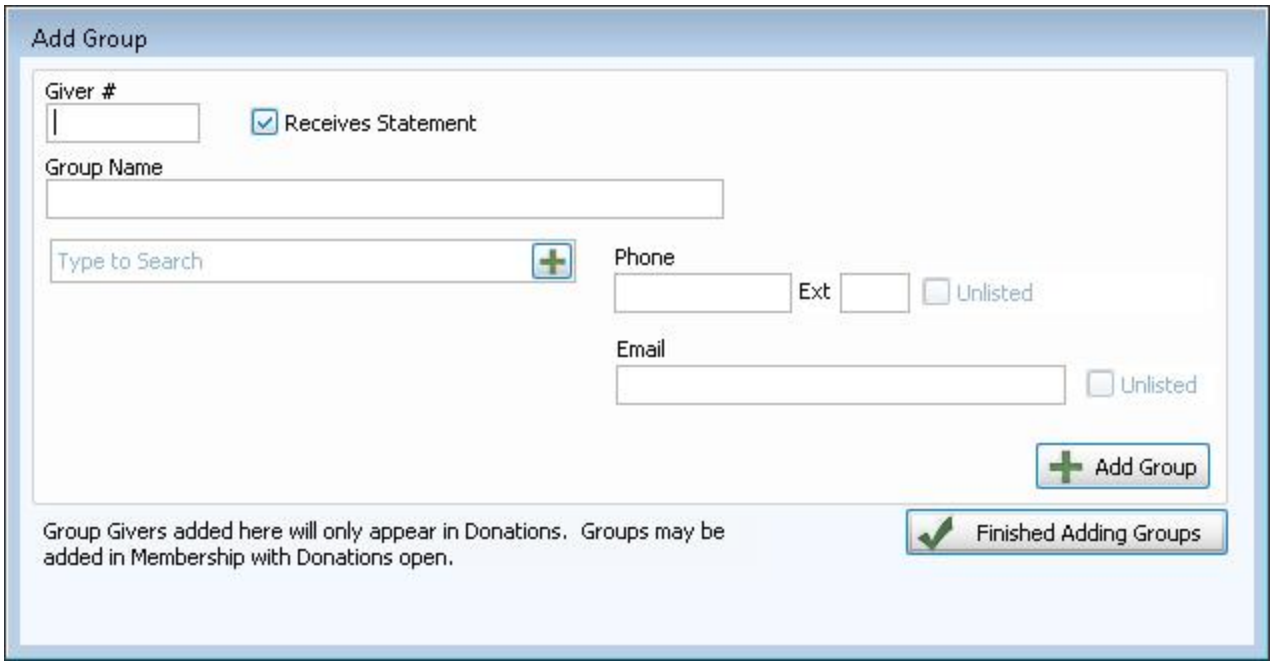
- If the person *IS* a member of a family already in The People File:
  - Click in the **Existing family** radio button to select it.
  - A list of all of the households in the database will appear in the dropdown.
  - Scroll through the list to find the appropriate family.
  - Click the family name once to select it, and that family's information will appear in the **Family** information section of the screen (you may edit this information if needed) on the left.
- Enter the new member's information to the **Individual** information section of the screen on the right.
- Click **OK** to save the record to The People File or click **Cancel** to discard this record.

Add a Group Giver

This will allow you to add new contact information and Giving # for those who will be making pledges and/or donations to your Church as a group of Givers that you want to exclude from the Membership Module.

- Click the **Add Group** button:

- The **Add Group** screen will appear:



- Enter the information that pertains to the group in the fields provided.
- When finished, click **OK**.

Once you have added givers, you can view them in **Manage Givers** *(pg 133)* and give them credit for their giving through **Enter Donations** *(pg 29)*.

Transfer Donations

If you accidentally **Enter Donations** *(pg 29)* to the wrong Giver, use the **Transfer** screen to transfer donations from one Giver to another. The following instructions will show you how to complete the transfer.

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

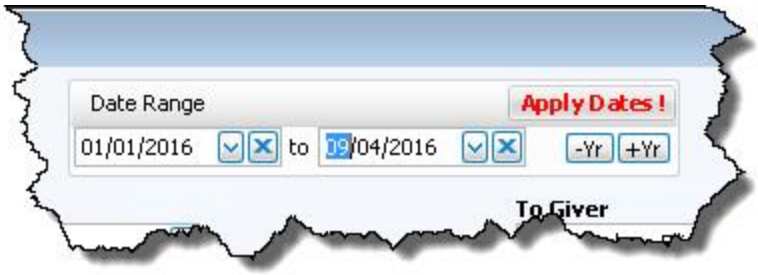
2. Click the **Transfer Donations** button:

3. **Date Range**

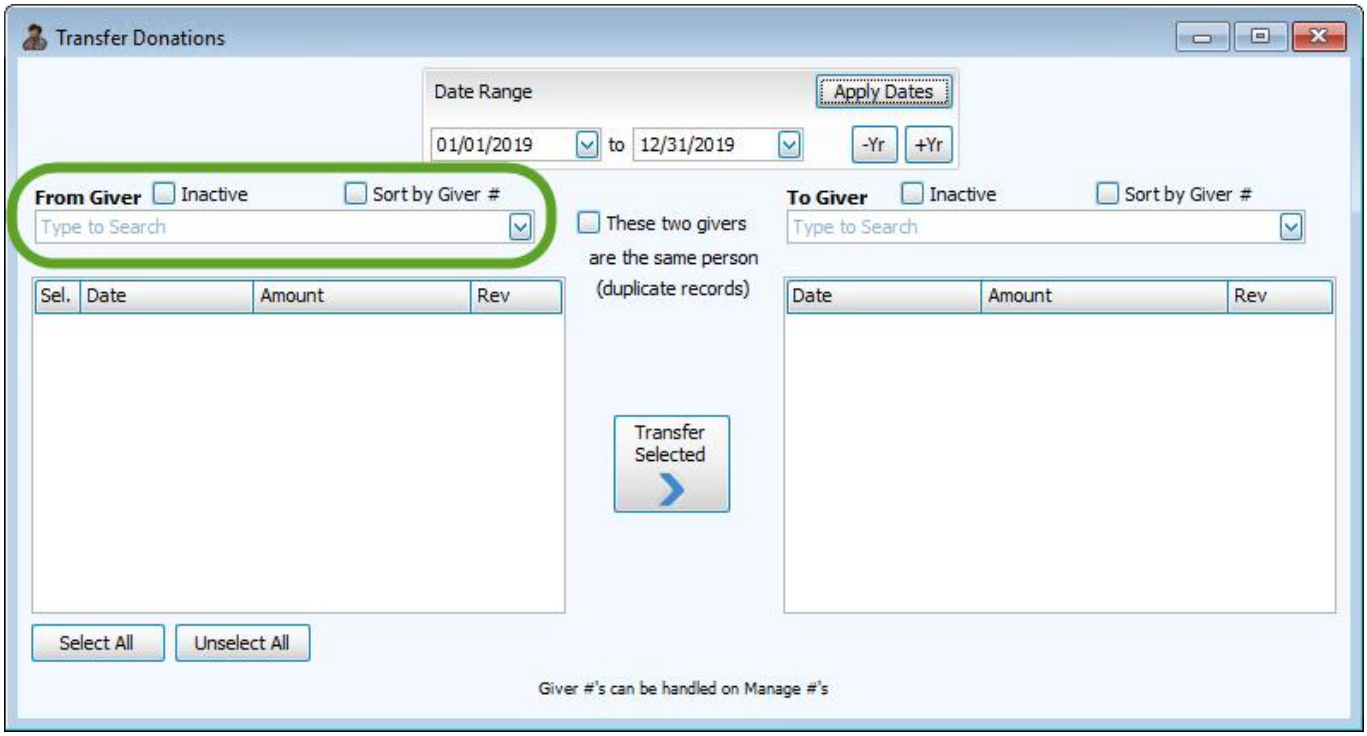
   If you would like to transfer only donations between certain dates, use the box to choose beginning and ending dates by either:

   - Typing in dates (Use a MMDDYYYY date format WITHOUT slashes.)
   - Using the dropdown calendars
   - Using the **+YR** and **—YR** buttons to move forward or backward between years.

   Once your date selections are made, the **Apply Dates!** button will turn red and you *must* click it to confirm your date selection:



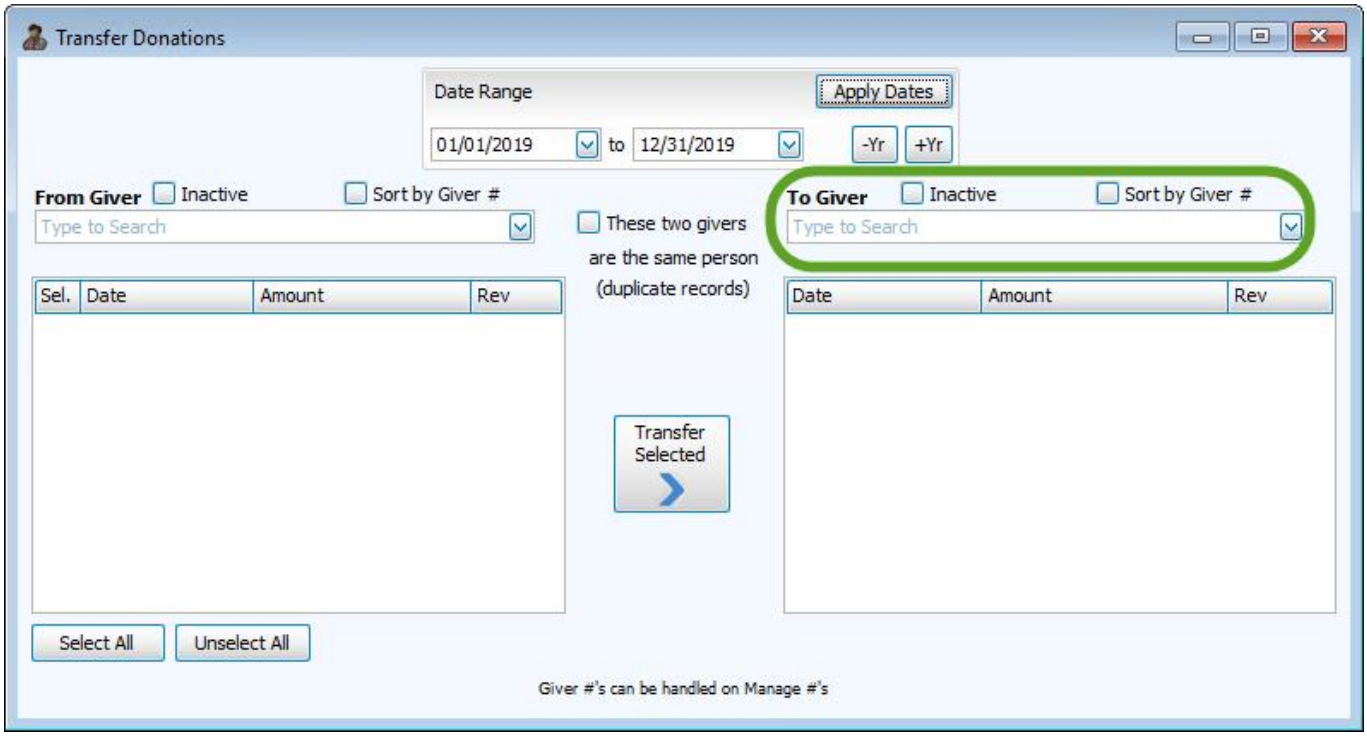
4. **From Giver:**



On the *left* side of the screen,

- Click the dropdown button.
- Choose the name of the Giver *from whom* the donations are to be transferred.
- When you select a Giver, all of their donations during the selected date range will be listed.

5. **To Giver:**



On the *right* side of the screen,

- Click the ☑ dropdown button.
- Choose the name of the Giver *to whom* donations are to be transferred.

6. Place ☑ checkmarks next to all the donations that you want to transfer.

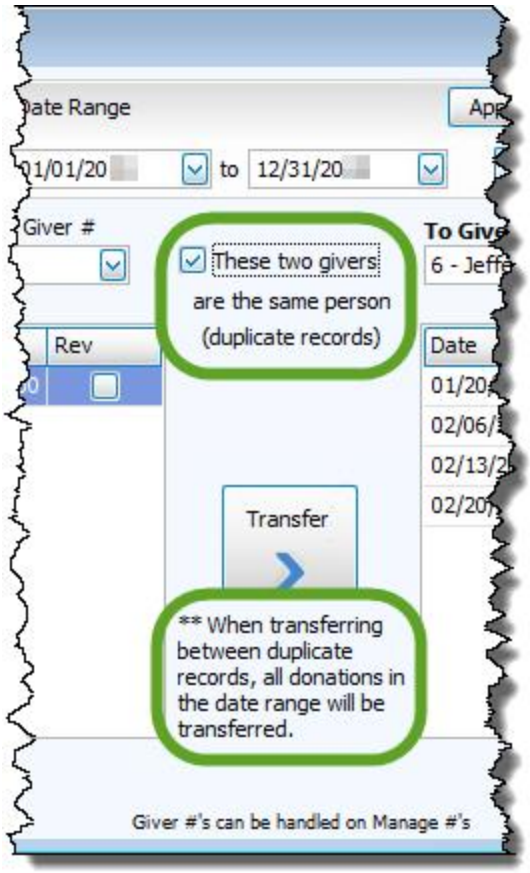
7. Remove checkmarks next to any donations that you do not want to transfer:

Sel.	Date	Amount
☑	07/25/2010	$35.00
☐	08/01/2010	$55.00
☑	08/08/2010	$75.00
☐	08/15/2010	$55.00

Note:

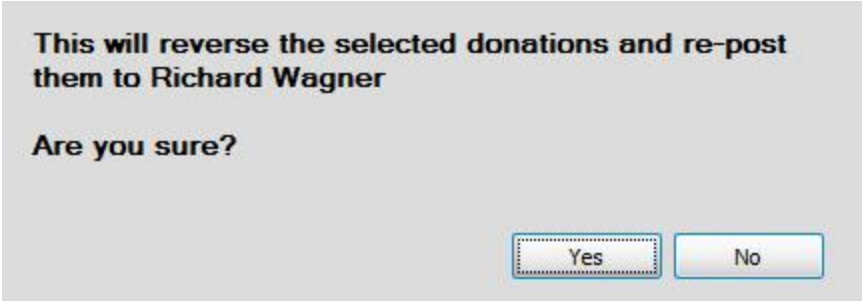
Originally, all items in the list on the left will be automatically ☑ set with a checkmark. You can use the ***Select All*** *or* ***Unselect All*** *buttons at the bottom of the screen, if needed.*

8. If you are using Transfer to combine two separate, duplicate records for the same person you can check the box in the center of the screen "**These two givers are the same person (duplicate record)**" which will transfer all of the donations in the selected date range and enable you to delete the duplicate record after the transfer is complete:



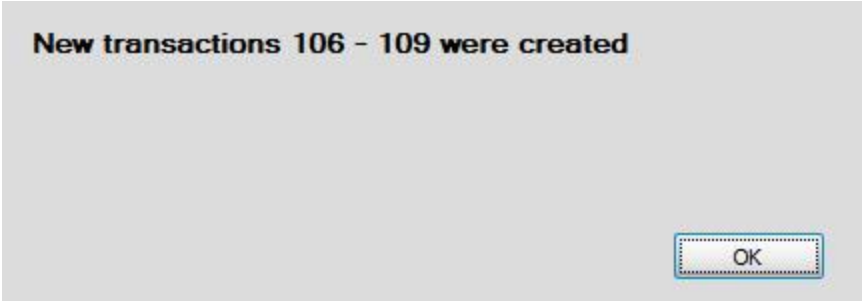
9. Click the **Transfer Selected** button to proceed to transferring the selected donations.

10. The following message appears to warn you that whichever donations you selected on the **From Giver** list will be reversed and then posted onto the record of the person or group selected in the **To Giver** dropdown.

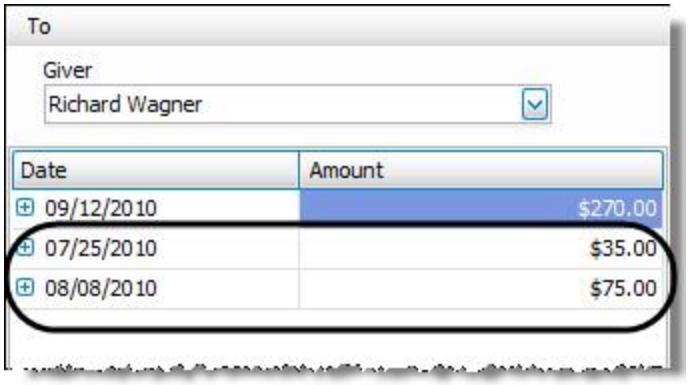


11. If you are sure that the selections are correct, press **Yes**. Otherwise, press **No** and you can review your settings and try again.

12. When you press **Yes**, the following message will display the new transaction numbers for the transferred giving.



13. The selected donation(s) will jump from the **From** list on the *left* to the **To** list on the *right*.



Repeat these steps for all donation transfers that you need to make, and close the screen when finished.

Manage Giver Numbers

If your Church assigns numbers to people that make donations to the Church, you can use the software to keep track of the number, alongside the Giver's contact information. Use the Manage Giver Numbers screen to **Assign Giver Numbers** *(pg 162)* and **Change or Remove a Giver Number** *(pg 166)*. With this screen, you can also reassign numbers from year to year, keep a history of numbers assigned to Givers, and print a list of Giver numbers. Although this screen is focused primarily on providing you with a way to assign Giver numbers, you can also use this screen to establish if a Giver is giving as a family, if a different name is to print on a statement, and other features discussed below.

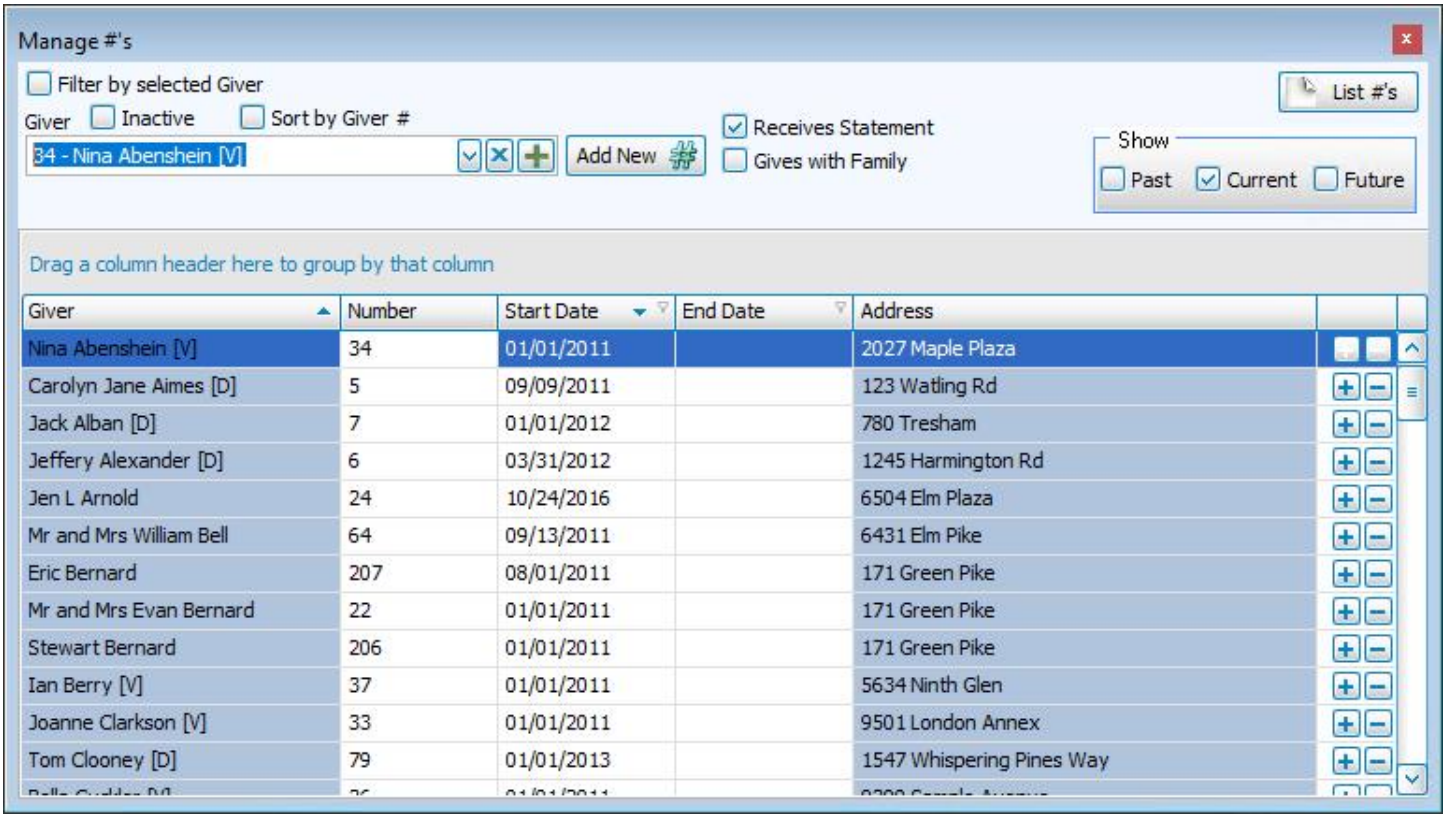
> **Note:**
>
> *Giver #s are no longer required by Church Windows. If your Church does not use physical envelopes or giver numbers in your actual daily operations, you do not need to use them in the software. You can still enter, keep track of, and print* ***Reports, Labels, and Statements*** *(pg 191)* *for Givers without assigning them numbers.*

To access the Manage Giver Numbers screen:

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

2. Click the **Manage #'s**button that appears below

3. The **Manage Numbers** window will appear:



From Manage Numbers, you can:

- **Assign Giver Numbers** *(pg 162)*

  If your Church is accustomed to assigning a number to anyone who makes donations to the Church, you can add a number to the record of a Giver.

- **Change or Remove a Giver Number** *(pg 166)*

  If you have determined to change or remove the Giver number from the record of a Giver.

- **List #s**

  If you need to print a report of your assigned numbers and/or unassigned numbers, click **List Giver #s** *(pg 226)* in the top right corner of the screen.

- **Past, Current, & Future Giver Numbers**

In the upper right corner of the Manage Giver Numbers screen, you can specify what Giver Numbers the screen should display.

Place a ☑ checkmark next to any or all of the desired boxes.

Past: When checked, the Manage Giver Numbers screen will show you Giver numbers that have been assigned in previous years and have expired.

Current: When checked, the Manage Giver Numbers screen will show you Giver numbers that have been assigned in the current year and have not yet expired.

Future: When checked, the Manage Giver Numbers screen will show you Giver numbers that have been assigned to start on a date later than today.

- ***Receives Statement***

You must place a ☑ checkmark in this box if the selected Giver is supposed to receive **Donation Statements** *(pg 248)*. If there is no checkmark in this box, the software will not be able to print a statement for the selected Giver.

- ***Giving as a Family or Giving Separately***

These instructions focus on the following two ways that you can **Assign Giver Numbers** *(pg 162)* within one family:

- Set any person, group, or family with an individual Giver Number.
- Set to show a person giving with their family, therefore using the Giver Number of the family.

Make your changes using the **Manage Giver Numbers** screen and the following instructions.

1. Click the dropdown button and choose the desired Giver name.

2. Then proceed to the steps of either **Giving Separately** or **Giving with Family:**

Giving Separately

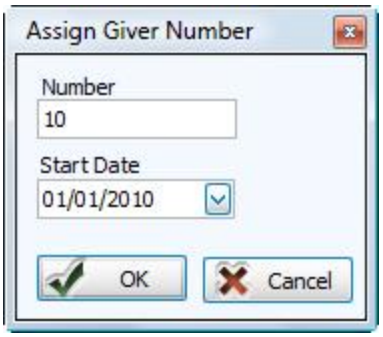
- Make sure that the ☑ checkmark from the **Gives with Family** box has been removed:

- 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.

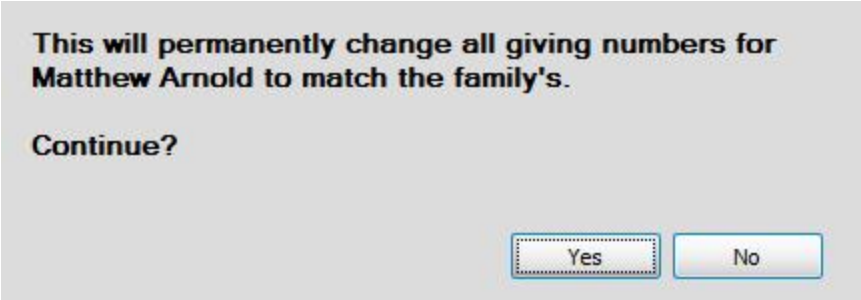
Giving with Family

- 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 Canada.

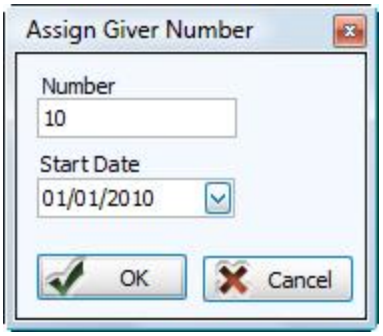
- The list on the left side of the **Manage Givers** *(pg 133)* screen will show a blue box for those Givers you have assigned as **Gives with Family** (and they will have the same Giver Number, if one is assigned).

- 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 *(pg 156)*
   - 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 133)*
   - 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.

Assign Giver Numbers

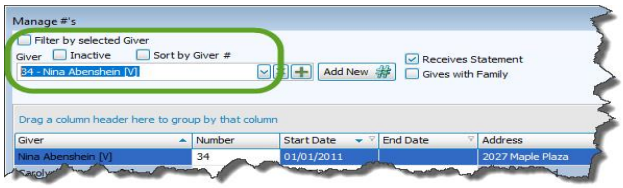
Use the following instructions to assign a Giver number to any person, group, or family. If you are assigning numbers to many Givers, it would likely be more efficient to use Auto Assign Giver Numbers *(pg 168)*.

> ***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 (pg 191) for Givers without assigning them numbers.*

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

2. Click the **Manage #** button.

3. **Giver**
   In the top left box of the Manage Giver Numbers *(pg 156)* screen, click the dropdown button to choose the name of the person, family, or group towards for whom you wish to add a Giver number.



> **Note:**
>
> *If you have determined that you must first Add Givers (pg 144) before proceeding, click the* ***Add*** *button.*

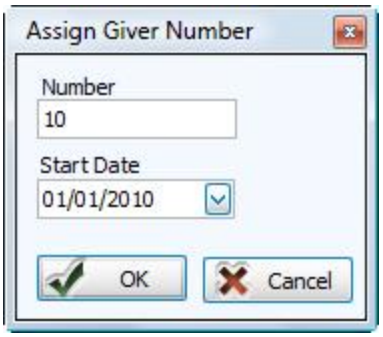
4. Make sure as to whether the Giver will be giving with the family, or if the Giver will be giving money separately. Then proceed to the steps of either:

Giving Separately

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

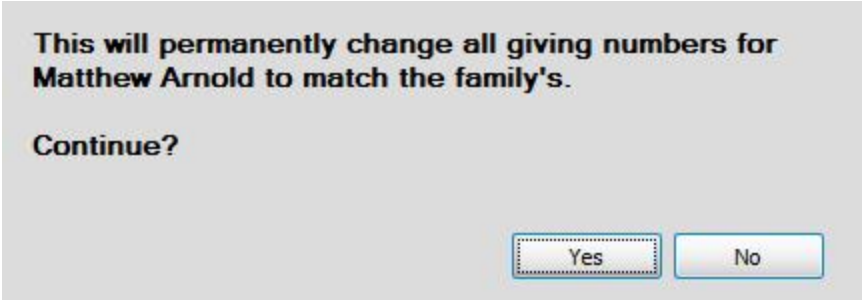
Giving with Family

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

- 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:*

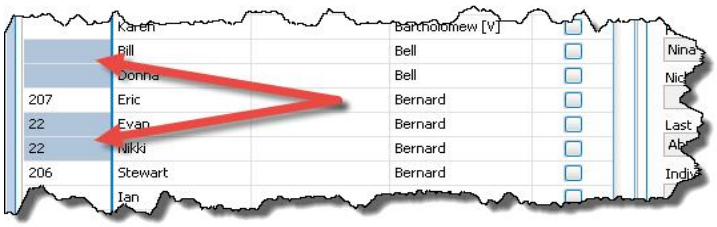


- If you do not get a message at all, your change was made successfully.
- Once the **Go to family** button appears, you have successfully added the individual to the family to which they belong.

Canada Note:

Please also see 'Gives with Family' in Canada.

- The list on the left side of the **Manage Givers** *(pg 133)* 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).

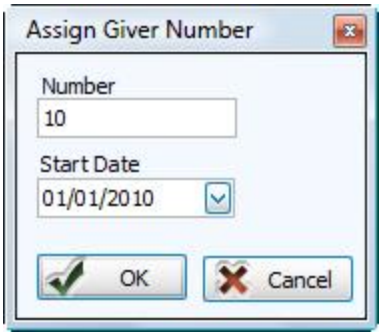


- If needed, you can now enter the Giver Number that the family will share (if one has not already been assigned), use either:

1. Manage Giver Numbers *(pg 156)*
   - 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

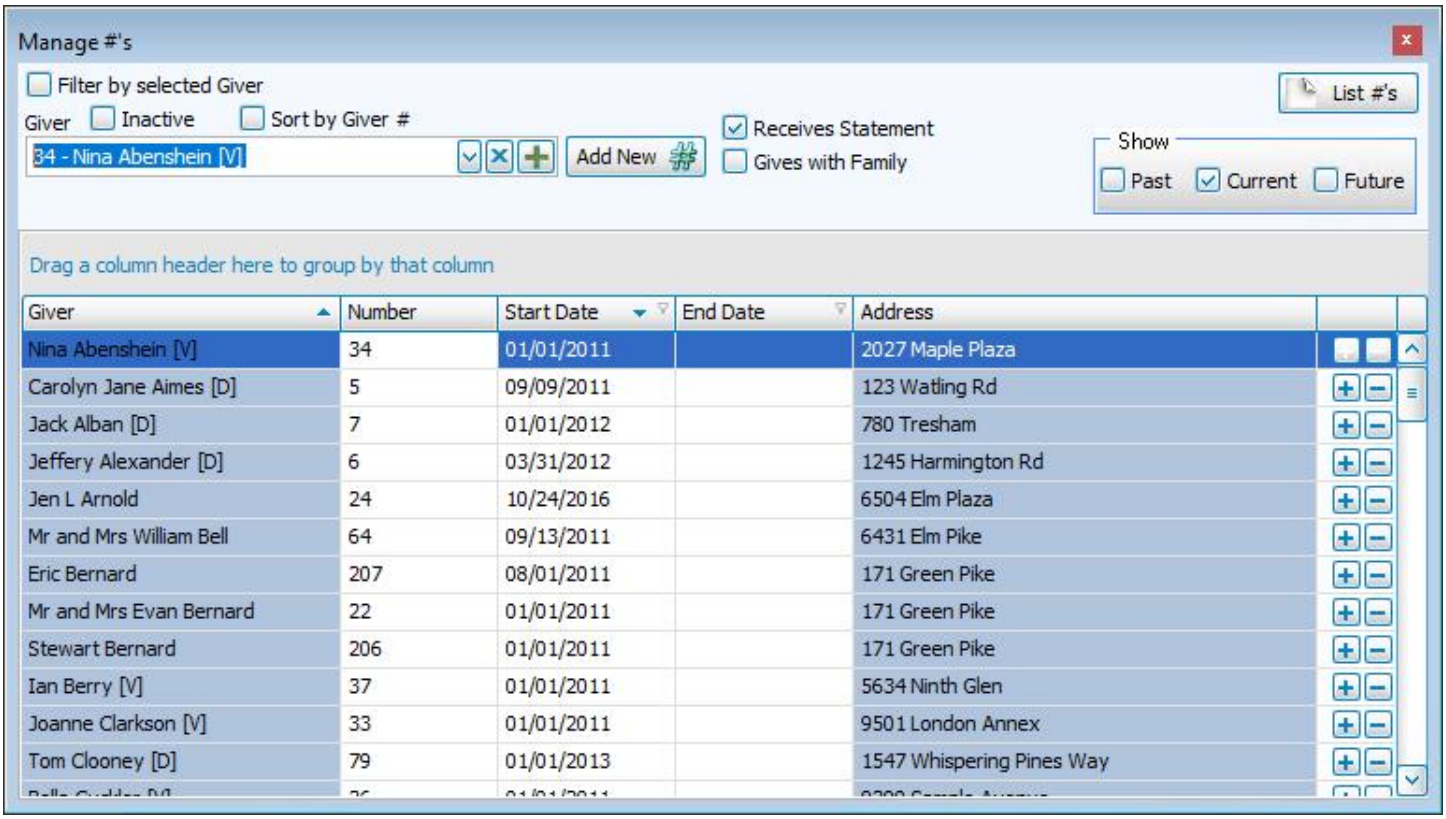
2. Manage Givers *(pg 133)*
   - Click the **Go to family** button
   - Type the desired number in the empty **Current Giver #** box on the **Giver #** tab.

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

5. The Giver whose adjustments you just made will be highlighted in the list in the larger portion of the Manage Giver Numbers *(pg 156)* screen.
6. If the Giver is to receive Donation Statements *(pg 248)*, you *must* have a ☑ checkmark in the **Receives Statement** box.

Change or Remove a Giver Number

Use the Manage Giver Numbers *(pg 156)* screen to change or remove the number already assigned to a Giver. If you are changing or removing numbers for many Givers, it would likely be more efficient to use Auto Assign Giver Numbers *(pg 168)*.



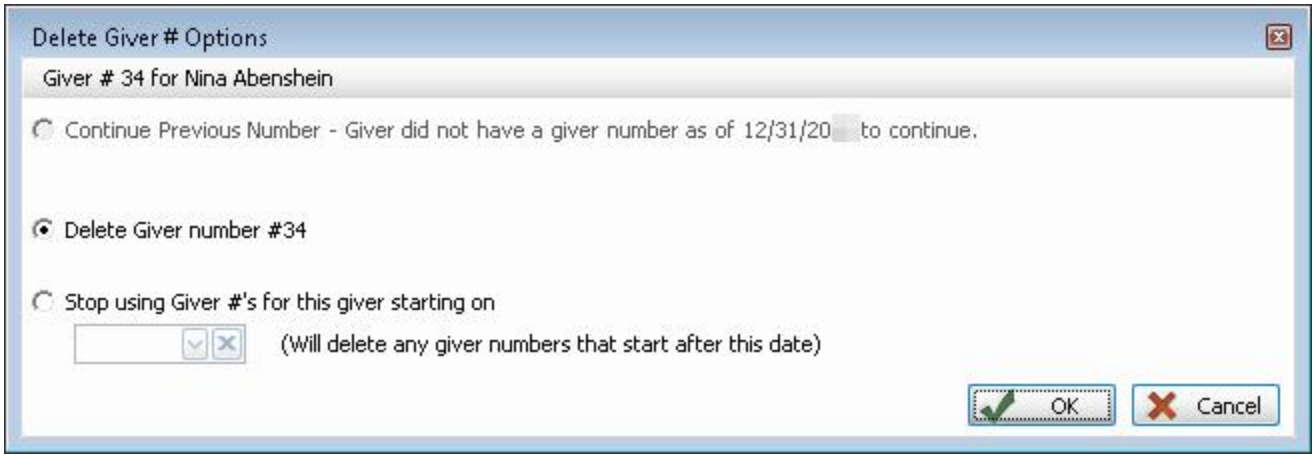
Follow these steps to change or remove the number:

- Find the Giver whose number you want to remove and click the field that contains the number.
- Click in the **End Date** column of that row and enter the date you want to stop using this number for this Giver.

> **Note:**
>
> *Numbers cannot end and start on the same day. For example, for Givers whose number ends on 12/31/YYYY can have a new number start on 1/1/YYYYY.*

Then press the **Enter** key on the keyboard and your changes will be saved.

- Alternatively, you can press the **Delete** button at the end of the line and select from three options:



- To Assign Giver Numbers *(pg 162)*, you can press the **Add** button at the far right to enter a new number or the **Add New #** button at the top of the screen.
- When you are finished, click the **X** in the top right to close. Your changes are automatically saved.

Auto Assign Giver Numbers

The Auto Assign #s features provide you with conditions upon which you can set up Giver numbers to automatically be assigned to specific Givers in the software quickly and easily, effective on a specific date. Using the Auto Assign #s Screen *(pg 175)* you can:

- Assign specific new numbers of your choosing *(pg 179)*
- Allow the software to assign new numbers *(pg 176)*
- Remove assigned numbers after a specific date *(pg 180)*

If you need to print a report of your assigned or available numbers for reference in this procedure you can List Giver #s *(pg 226)* first.

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*** *(pg 191)* *for Givers without assigning them numbers.*

Important!

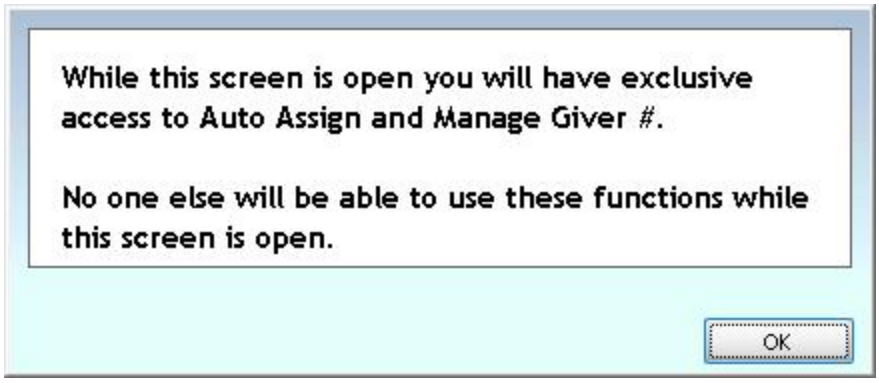
We always recommend Making a Backup of your data before you begin this process.

To access the Auto Assign Giver Numbers screen:

- From The Initial Portal of Church Windows choose Donations
- Click the **Givers** menu option in the **Button Bar** at the top of the screen

- Click the **Auto Assign #** button

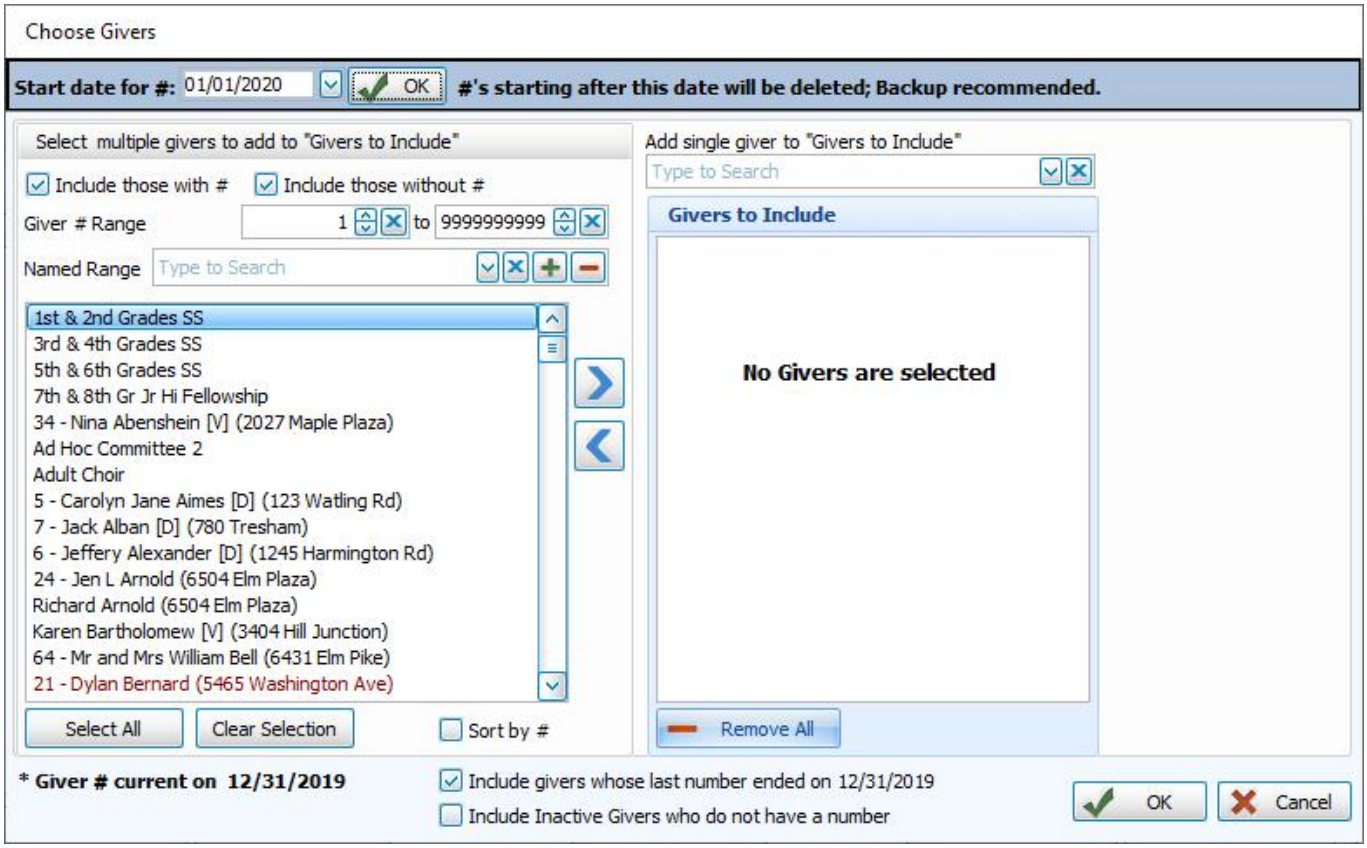
- A window will popup alerting you that only one of your Users can access this screen at one time, click **OK**:



- Enter in the **Start date for #** box the date that you want the number change to take effect (if ending numbers, the previous day will be used as the **End Date**).

- Click the **OK** button to proceed.

- **Using the Choose Givers Screen** *(pg 172)*, select the **Givers** whose numbers you wish to change by moving them from the *left* side of the screen to the *right* side:



- Click **OK** when finished.

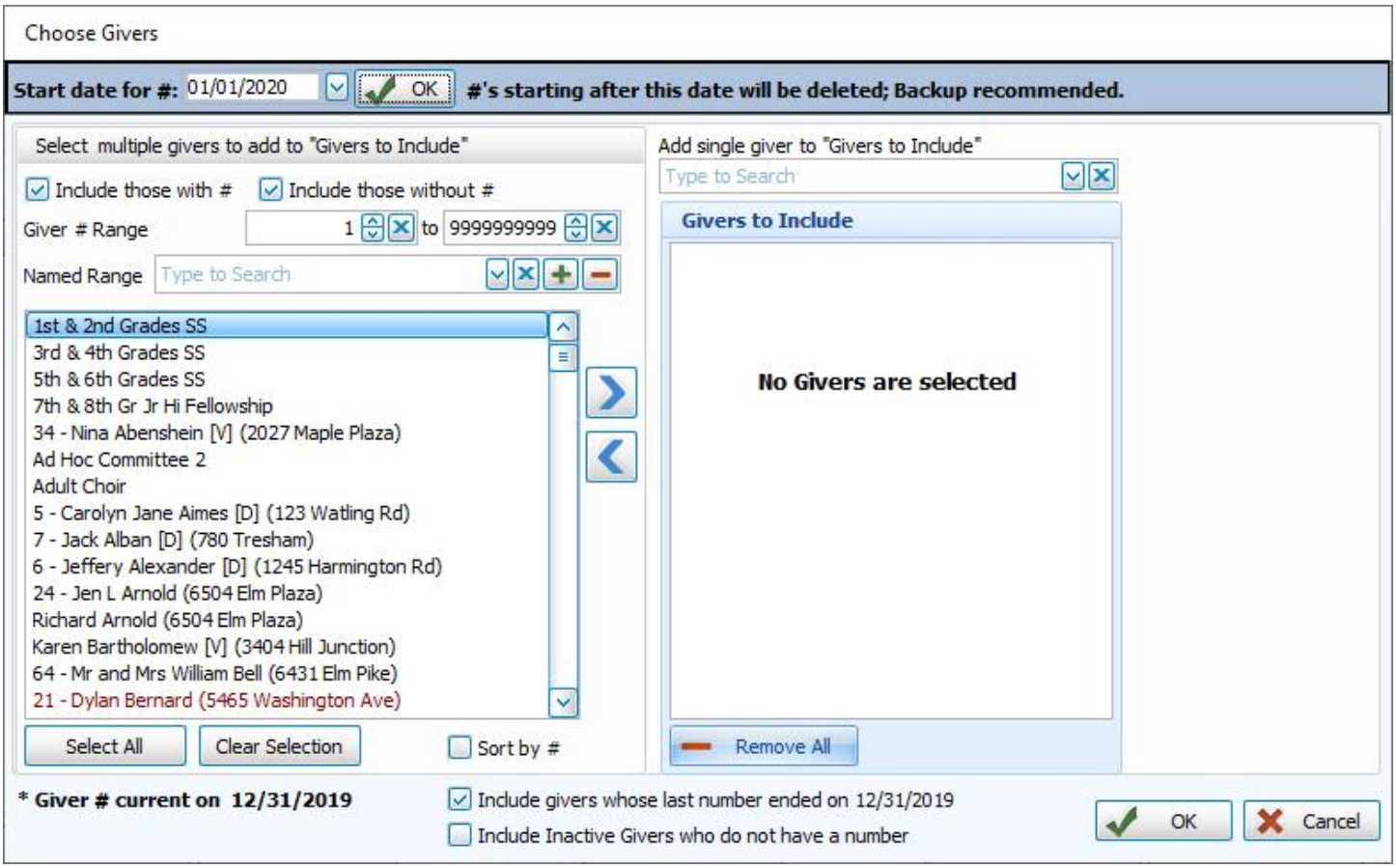
- Assign or remove Giver numbers **Using the Auto Assign #s Screen** *(pg 175)*

- Click **Save and Close** to keep your changes or **Cancel and Close** to discard them.

Using the Choose Givers Screen

The **Choose Givers** screen is the first step to **Auto Assign Giver Numbers** *(pg 168)*. Use this screen to select which Givers to include for assignment of new and/or removal of old Giver Numbers using the ***Auto Assign Giver Numbers*** *(pg 168)* function. While you are either assigning new numbers or removing current numbers, the **Choose Givers** screen will appear so that you can specify the Givers to affect.

At the top of the screen a blue bar will show you a date box. Choose the date on which the new number will take effect and press the **OK**. Once you have done so, the rest of the features below will become available for you to select.



The left side of the **Choose Givers** screen will list all of the Givers that are available for selection. First, select which Givers to move to the right side of the screen to include them in the assignment.

Select the Givers:

Based on Existing Numbers

If you would like to include all Givers, regardless of whether the Giver has a Giver Number stored on record, place a checkmark in both **Select Givers with #** and **Select Givers without #** boxes. Otherwise, place a checkmark in only one of the two boxes.

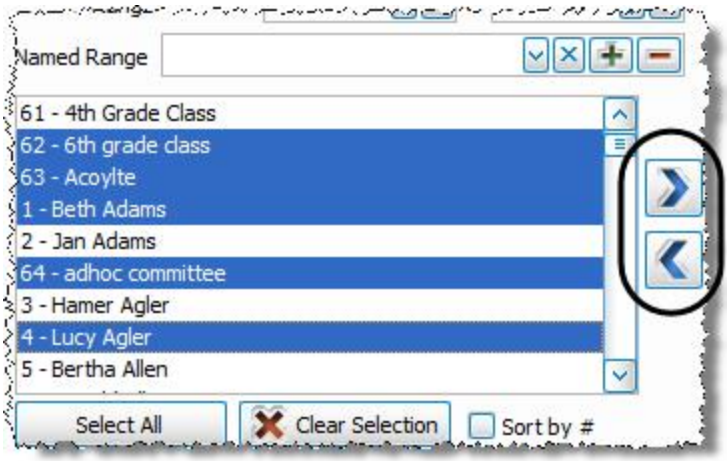
Place a checkmark in the **Sort by #** box to organize the list in order by the Giver #. If a checkmark is not in this box, the list will show the names in alphabetical order by name.

Use the **Giver # Range** boxes to choose the range of Giver numbers. If you have saved a Giver # Range in the past and would like to reuse it, select it from the **Named Range** box. You can also add a new Named Range by clicking the **Add** button. Or, if you no longer need a Named Range that currently exists in the list, select it and click the **delete** button.

Add Single Giver "Givers to Include"

In the upper right corner of the screen, use this box to individually choose the Givers that you want to select. Either type the Giver name/# or click the dropdown button, then click the name of the Giver, and that name will appear in the **Givers to Include** list.

Use the right button to move the selected Giver(s) to the "**Givers to Include**" list. To remove a record from selection for automatic assignment, click the record in the "**Givers to Include**" list and click the left button.



Note:

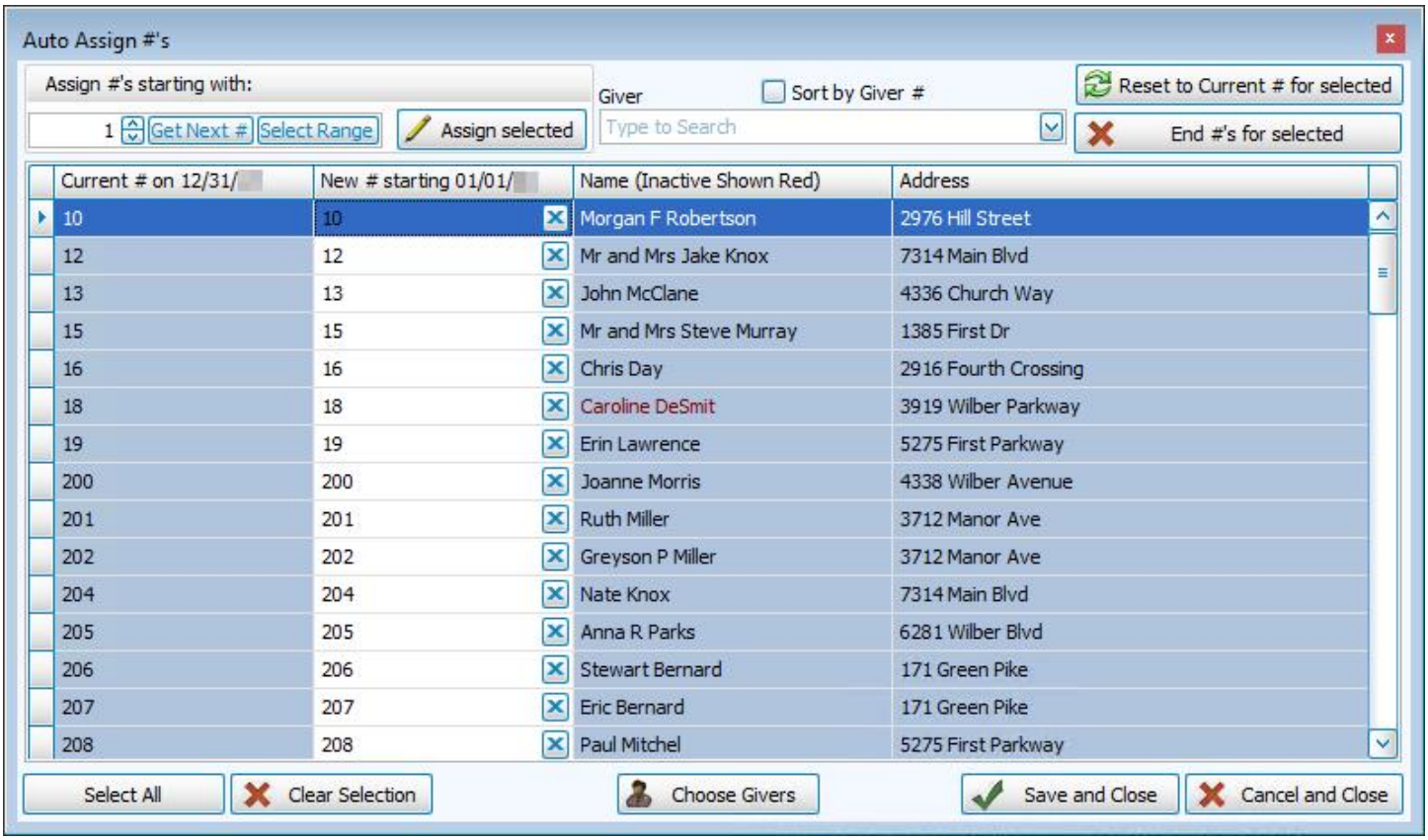
*If you would like to make multiple selections, make your first selection and then hold the **CTRL** key. Click each desired name until you have reached the bottom of the list, verifying that each selected item has appeared highlighted.*

*You can also make multiple selections by holding the **SHIFT** key, which selects groupings of items in the list at a time, or click the **Select All** button to select all in the list. If you want to clear all selections in the list, click the **Clear Selection** button.*

When finished, you will click the final **OK** button located at the bottom right. Then, Using the Auto Assign #s Screen *(pg 175)*, you can make your number assignments for the list of selected Givers.

Using the Auto Assign #s Screen

Once you have chosen the Givers on Using the Choose Givers Screen *(pg 172)* and have pressed the **OK** button, the *Auto Assign #s* screen appears:

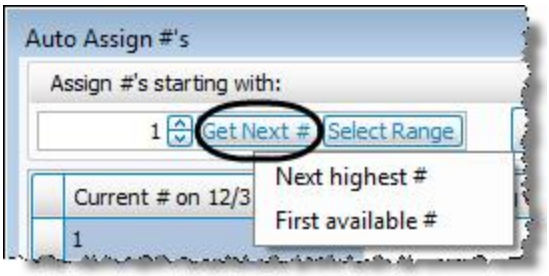


> **Note:**
>
> *If you need to change the list of selected Givers, click "**Choose Givers**" at the bottom center to return to the previous screen and you will be prompted to discard your changes or cancel and return to* *Using the Choose Givers Screen (pg 172)*.

The Auto Assign #s screen can perform three functions:

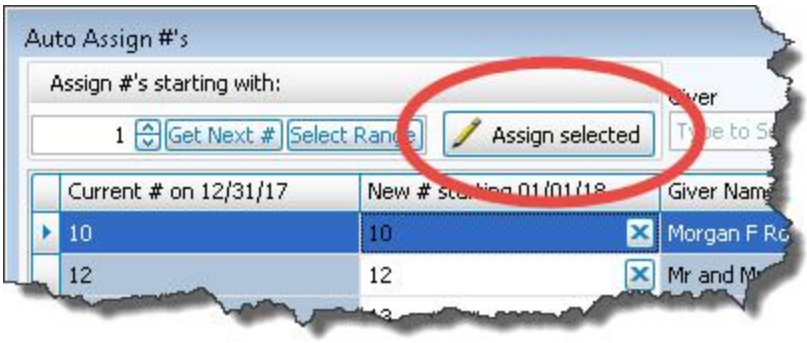
1. **Allow the software to assign new numbers**

    1. Click the **Get Next #** button and choose one of the two options:



- **Next highest #**: Displays the next highest number in the entire range of numbers.
- **Next available #**: Displays the next number available. When there is no gap in the range of numbers used, the next available # will be the same as the next highest #. Otherwise, whatever number is available within the range of numbers will show when this button is clicked.

2. If you have a set range of numbers that you are used to assigning, you can click Select Range. There, you can select your desired range of numbers or set up a new range.
3. Once you have selected the starting number, select the lines that represent the Giver names you to which you will be assigning the numbers.
   - If you want all lines selected, click the **Select All** button at the bottom of the screen.
   - Otherwise, click the first Giver, hold down the **CTRL** key on the keyboard, and then click each desired Giver line. Each item will remain selected as you click each subsequent line that you wish to include.
   - You can also use the **SHIFT** key in the same manner to select a range of multiple lines at a time.
4. Press the **Assign Selected** button to assign a number to each of the selected items based on the starting number you chose in Steps 1 and 2:

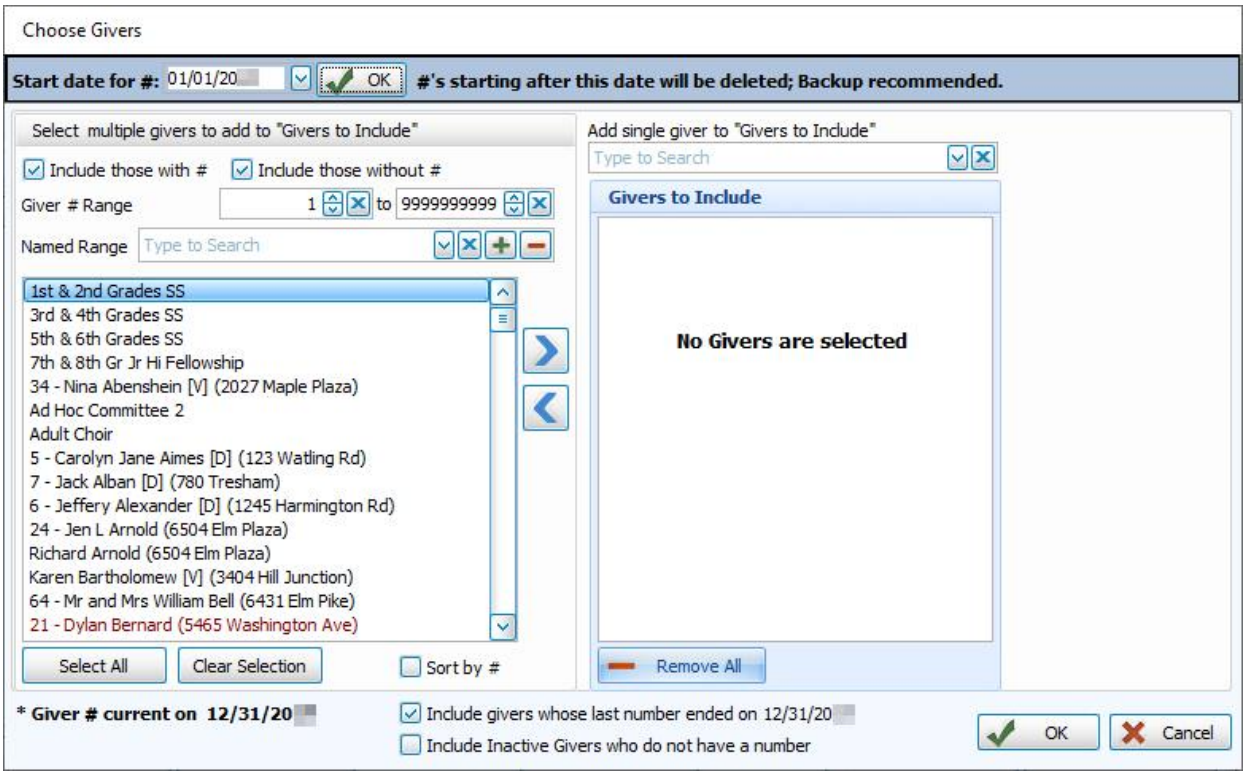


5. If you wish to reverse the assignment you made to the selected items, either:
    1. Click the **Reset to Current # for Selected** button
    2. Clear out the numbers for the selected Givers by clicking the **End #s for Selected** button
    3. Use the **X** button at the right side of the **New # starting MM/DD/YY** column to clear out individual numbers

2. Assign specific new numbers of your choosing

To enter Giver numbers one at a time:

- You can simply go down the **New # starting MM/DD/YY** column typing in the number you want each Giver to have beginning on the selected date:
- You can click on any of the column headers to sort this list by that column in either ascending or descending order (such as Name for alphabetical order).
- To pull up specific Givers, the dropdown box that says **Giver** (to the right of the **Assign #s starting with** box) allows you to find one Giver at a time by typing and selecting the Giver from the list in the drop-down:

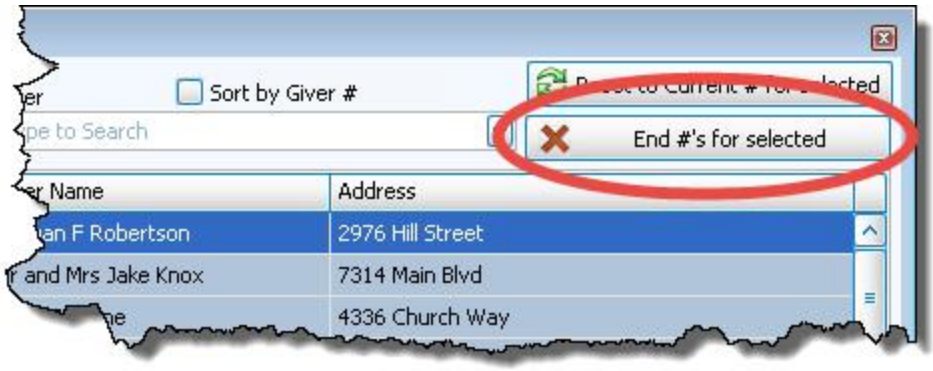


- If you want the list in the dropdown box to be sorted in order by the Giver #, click the **Sort by Giver #** box. When the box is checked, the Givers will be listed in order by the Number column.

3. **Remove assigned numbers after a specific date**

To end the numbers for some or all selected Givers:

- Choose either the specific Givers whose numbers you need to end by clicking the first Giver, holding down the **CTRL** key on the keyboard, and then clicking each desired Giver line.
- Each item will remain selected as you click each subsequent line that you wish to include.
- You can also use the **SHIFT** key in the same manner to select a range of multiple lines at a time.
- You can also click **Select All** to end numbers for all the Givers you chose on Using the Choose Givers Screen *(pg 172)*.
- Then just click the **End #s for Selected** button in the top right corner



When you finish using this screen, click the **Save and Close** button to retain the adjustments you make. To print a report of your changes, see List Giver #s *(pg 226)*.

Transfer People between Membership and Donations

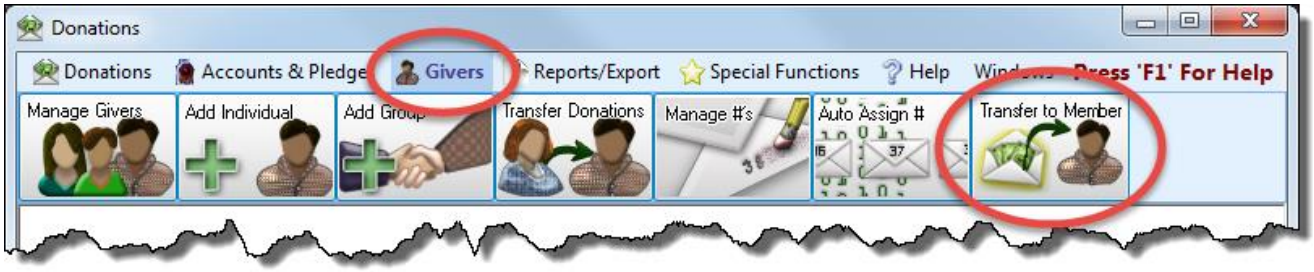
When people are entered into your database, They are entered as either Membership Individual Givers *(pg 146)* or as Donations Individual Givers *(pg 146)*. Their Module determines how much information you are able to track for each type of giver. Typically, Donations givers are people who only give to the Church but do not attend or came once and are not expected to return, while Membership individuals are people who you need to track extensive information for such as family members, ages, attendance, volunteering, etc. If these circumstances change and you need to move people from one Module to the other, you are now able to do so.

Important!

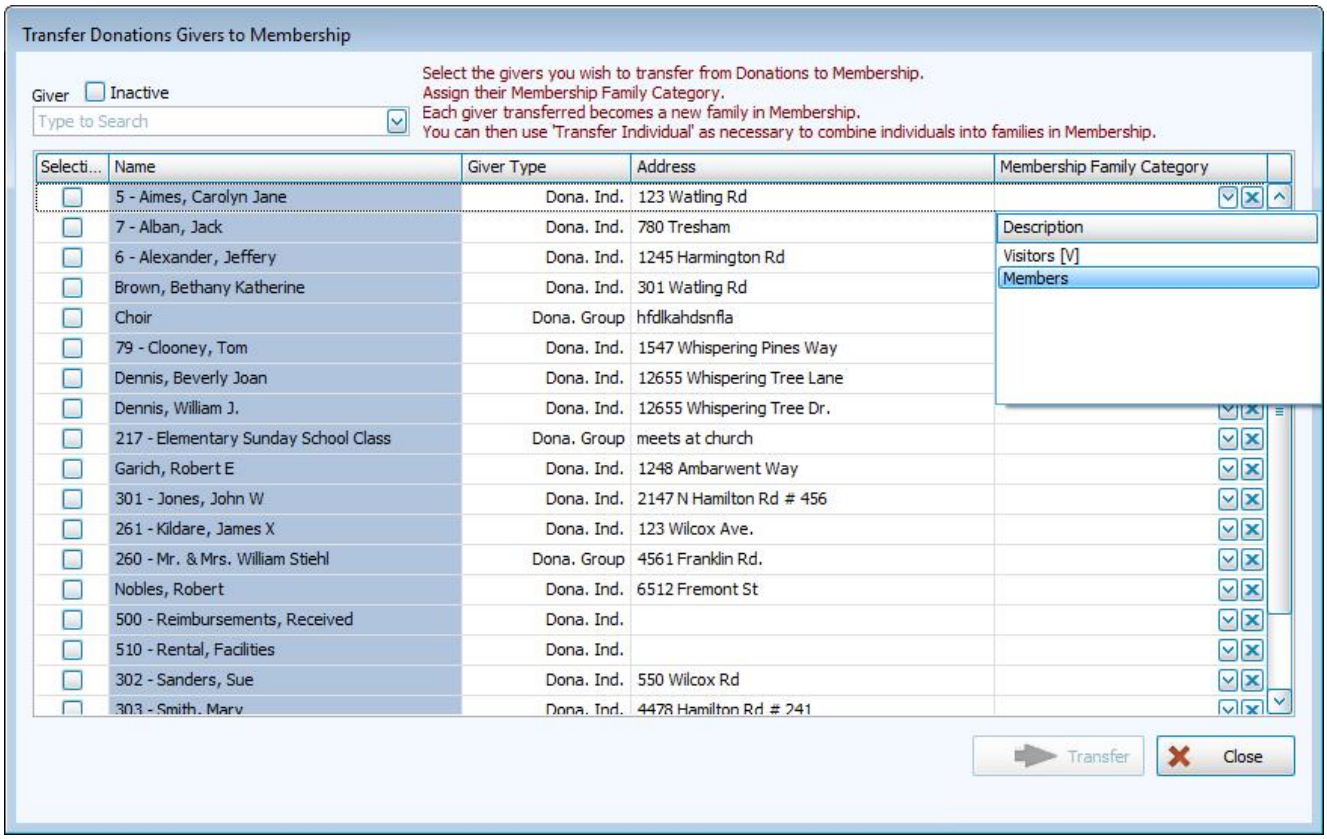
ALWAYS begin this process by Making a Backup of your entire database. Be sure you are 100% certain that a transfer is necessary before you begin. Transferring people between Membership and Donations *will* result in data loss, as each Module tracks different kinds of information about the individuals stored there.

Transfer from Donations to Membership

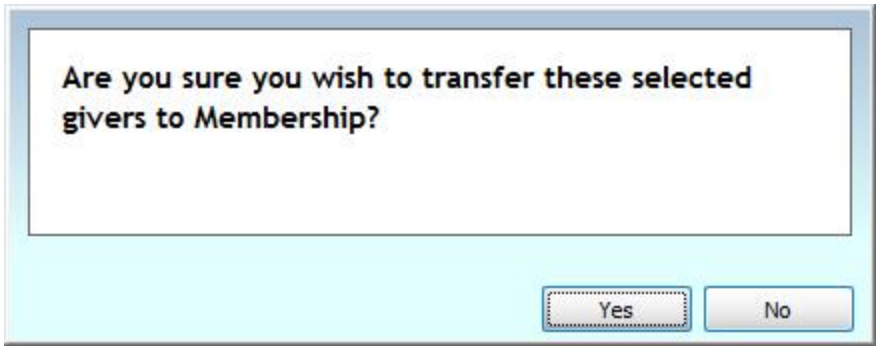
1. From The Initial Portal of Church Windows choose Donations
2. Then, in the **Button Bar** at the top of the screen choose **Givers**
3. Click the **Transfer to Member** button:



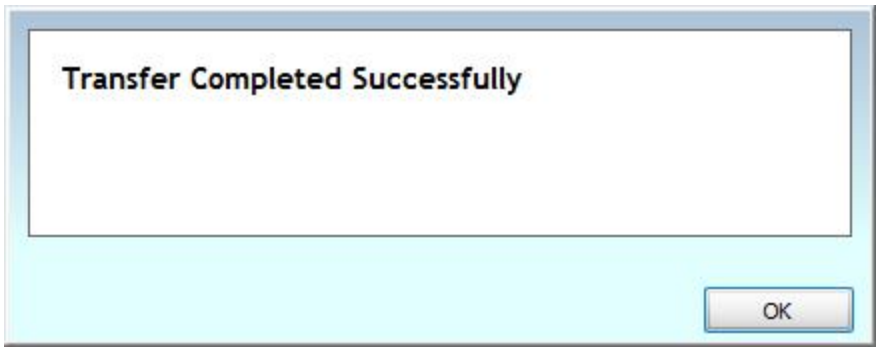
4. A window will open listing all of the **Donations Individual Givers** *(pg 146)*, you will put a ☑ checkmark next to each person you want to transfer and select one of your Family Categories to assign to each giver, then click **Transfer**:



5. A window will open to confirm that you wish to complete the transfer, click **Yes** or **No**:



6. A final confirmation screen will open letting you know the transfer succeeded:



Transfer from Membership to Donations

1. From The Initial Portal of Church Windows choose Membership
2. Then, in the **Button Bar** at the top of the screen click **Transfer to Dona.**

3. When you click the **Transfer to Dona.** button, a window will open containing the follow very important message, which explains what information will be lost after completing a transfer. It is *essential* that you read this message to fully understand the ramifications of completing a transfer:

Please read all of this information (scroll to the bottom) carefully and understand the implications of transferring Membership Individuals(s) to Donations. It is also recommended that you make a backup before continuing.

Only the following information for each selected individual will be moved from Membership to Donations. All other data for transferred families and individuals in Membership will be lost and they will be removed from any event they are connected to in Scheduler.

- First Name, Middle Name, Last Name, Title, Suffix, Nick Name, Comments.
- The address, phone, and email field you select on the next screen. Donations only allows one address, one phone and one email per individual. If you have more than one of these, the next screen will allow you to select the one that transfers.

Effect of the transfer on Donations/Pledges/Giver #'s

If everyone who gives with family is transferred:

- Because the Donations Module does not have a concept of a family, the "**Gives with Family** *(pg 140)*" marker cannot be maintained.
- As a result, when "Gives with Family" was assigned, Giver Numbers and pledges will be assigned to the first individual in the family (who was marked as "Gives with Family").
- This means that any donations that were given by someone other than the first individual in the family will no longer be associated with the pledge.
- You can, however, transfer giving from one individual to another after the transfer is completed.

Otherwise, selected people who "Give with Family":

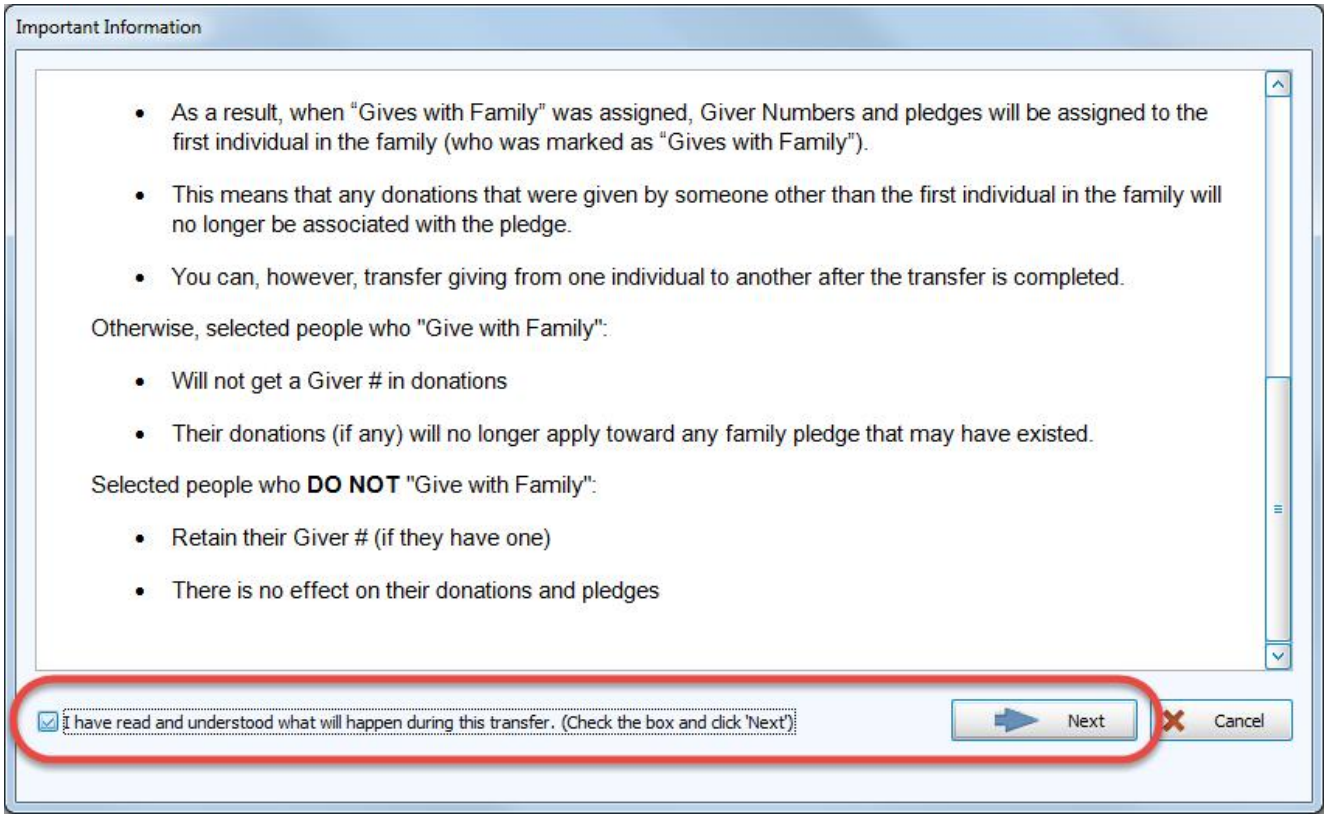
- Will not get a Giver # in donations
- Their donations (if any) will no longer apply toward any family pledge that may have existed.

Selected people who **DO NOT** "Give with Family":

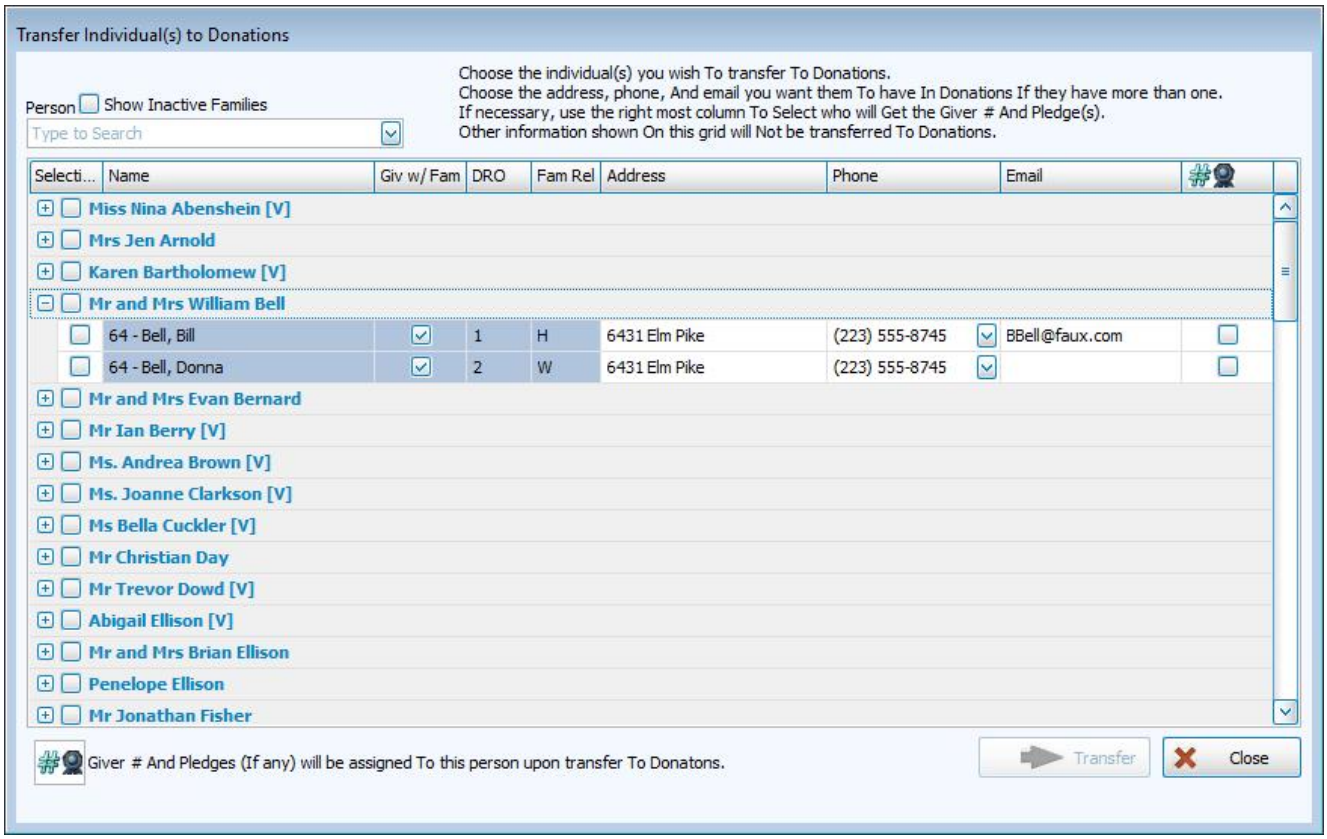
- Retain their Giver # (if they have one)
- There is no effect on their donations and pledges

Once you have read the entire message and are completely certain that you want to go ahead with the

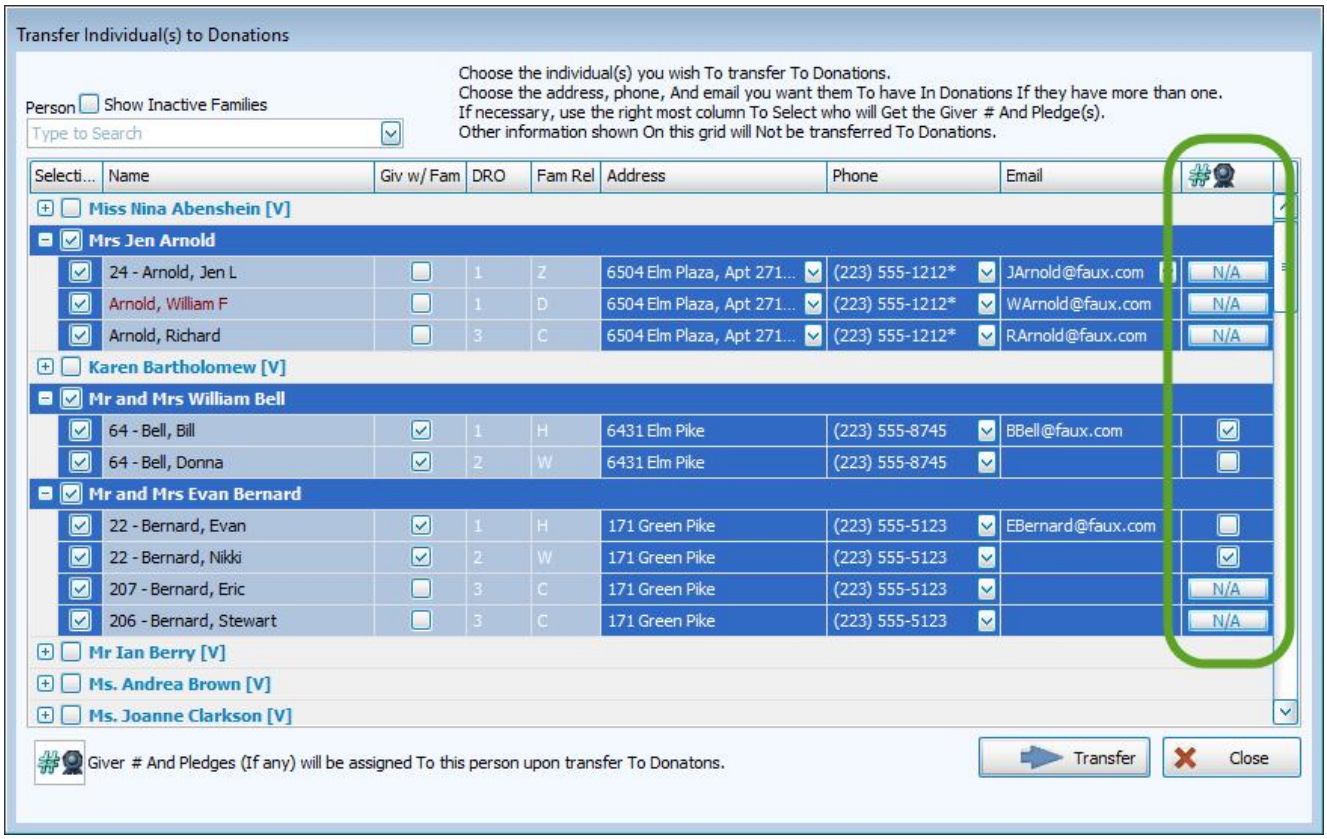
transfer, check the box stating "**I have read and understood what will happen during this transfer.**" and click → **Next**:



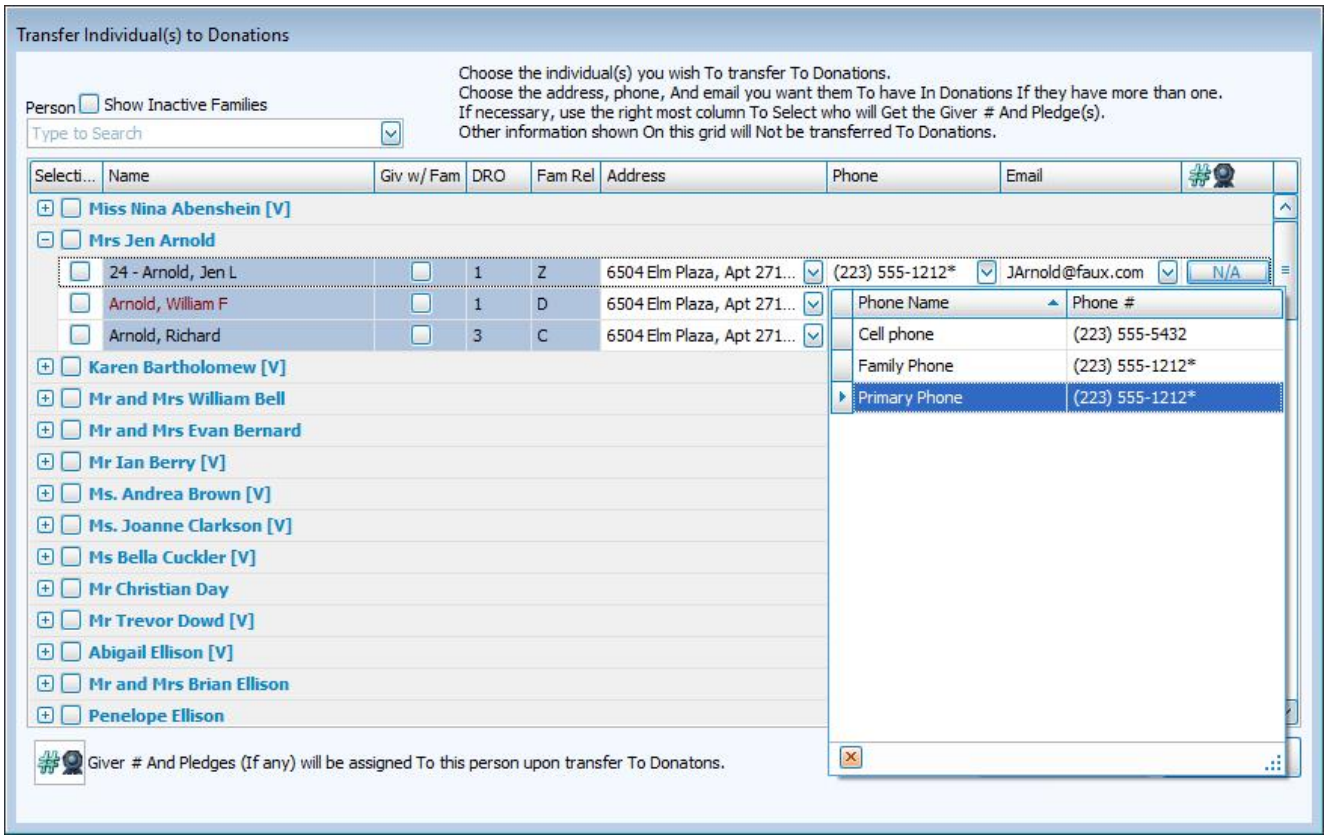
4. A window will open for you to select the people to transfer. Put a ☑ checkmark in the column to the left of the name of each person that you want to transfer:



5. If you are transferring a person who **Gives with Family** *(pg 140)*, you will need to check the box to choose one of the individuals to keep the giving and pledging in the for the family in the  column at the far right (it says **N/A** if they do not give together as a family):

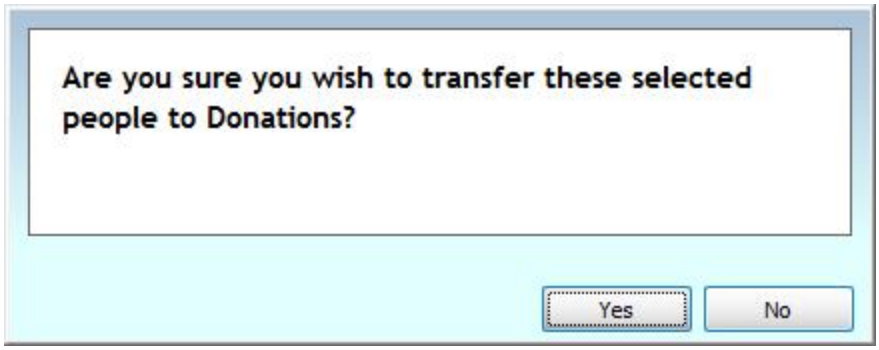


6. If there are multiple addresses, phone numbers, and/or email addresses for each individual, you will need to select one to store in Donations, as you cannot keep more than one for **Donations Individual Givers** *(pg 146)*:

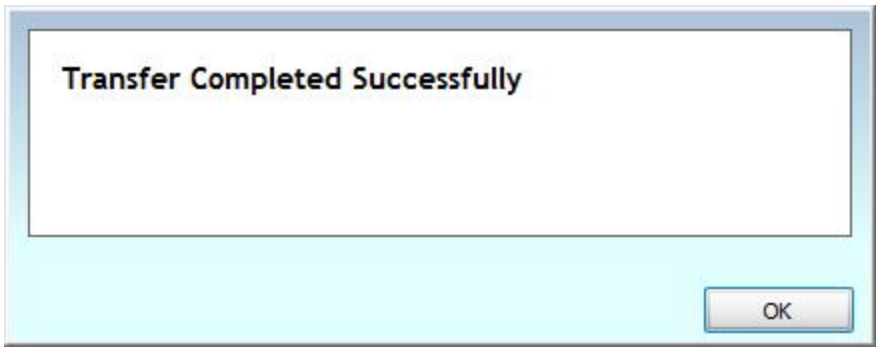


7. When you've made all of your selections click the **Transfer** button at the bottom right to complete the transfer, or click **Cancel** to discard choices without saving.

8. A window will open to confirm that you wish to complete the transfer, click **Yes** or **No**:



9. A final confirmation screen will open letting you know the transfer succeeded:


Transfer Completed Successfully
OK

Chapter 5 - Reports/Export

Reports, Labels, and Statements

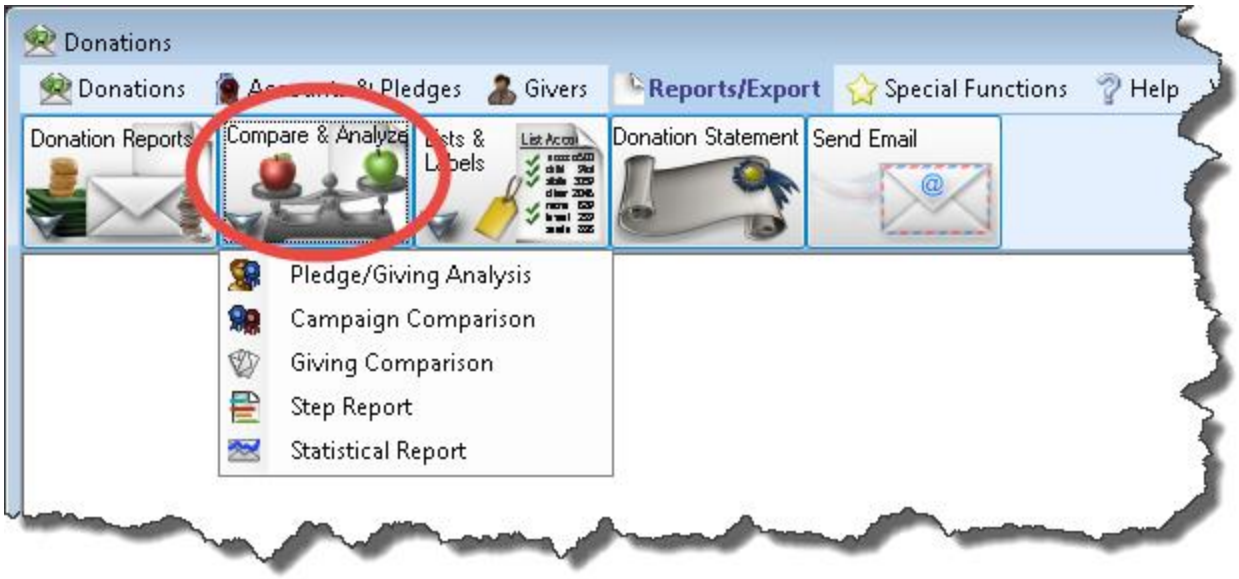
The Reports section of **Donations** provides a set of tools you can use to print donation statements, batch reports, giving and pledging details, mailing labels, and a deposit slip. All the information that shows on the reports depends on the information that has been entered into Church Windows Donations. Although some of the reports screen allow you to make changes to the information for the purpose of presentation, any changes made do not affect the information entered originally through the **Enter Donations** *(pg 29)* screen.

All reports, labels, and statements can be found under **Reports / Export** in the **Button Bar** at the top of the screen

Donation Reports

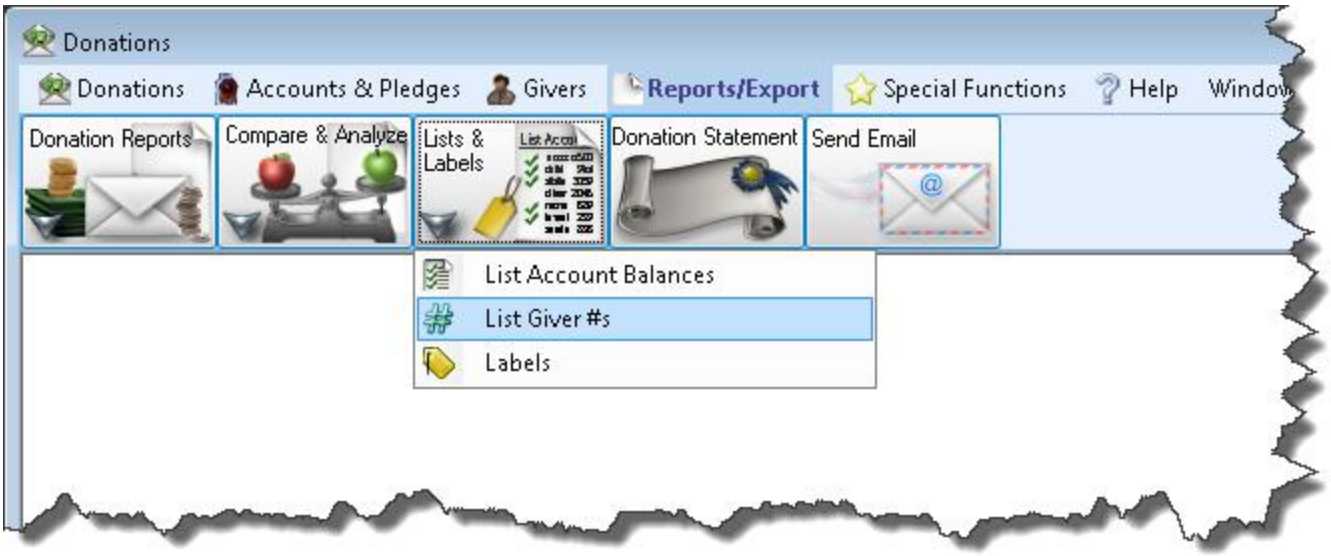
- **Donations Log Report** *(pg 194)*
- **Giving Summary** *(pg 195)*
- **Deposit Slip** *(pg 197)*

Compare & Analyze



- **Pledge / Giving Analysis** *(pg 203)*
- **Campaign Comparison** *(pg 207)*
- **Giving Comparison** *(pg 212)*
- **Step Report** *(pg 216)*
- **Statistical Report** *(pg 220)*

Lists & Labels



- **List Account Balances** *(pg 224)*
- **List Giver #s** *(pg 226)*
- **Labels** *(pg 229)*

- **Donation Statements**
- **Send Email**

Donation Reports

The options under the **Donations Reports** menu in the **Button Bar** at the top of the screen are:

Donations Log Report

The Log Report (as well as the Donations Batch Report) shows all batches and the donations that were entered inside the batch.

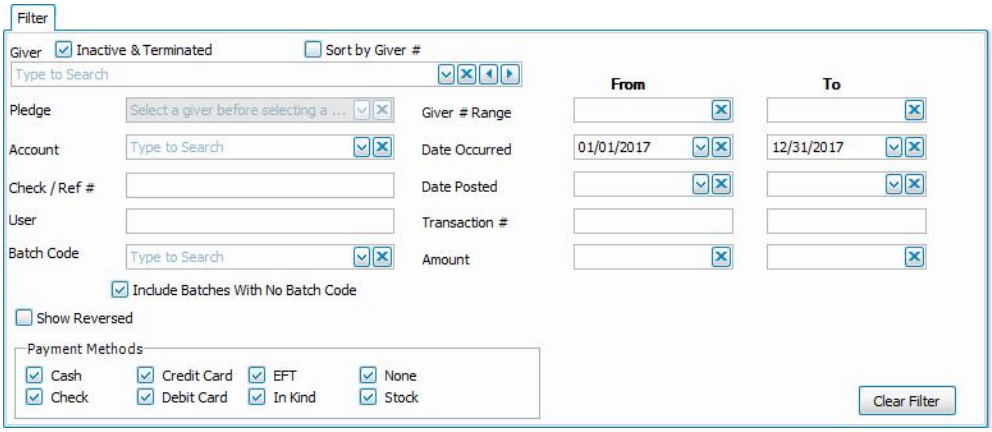
To view or print the Log Report:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Donation Reports** button that appears below.

3. Click the **Log Report** button that appears in the adjacent menu.

Use the fields of the **Filter Tab** *(pg 281)* to narrow down the giving information so that it shows you only the information that you seek:



Choose any of the following tabs to apply additional settings:

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Columns Tab

Determines the order and the appearance of the columns displayed.

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Giving Summary

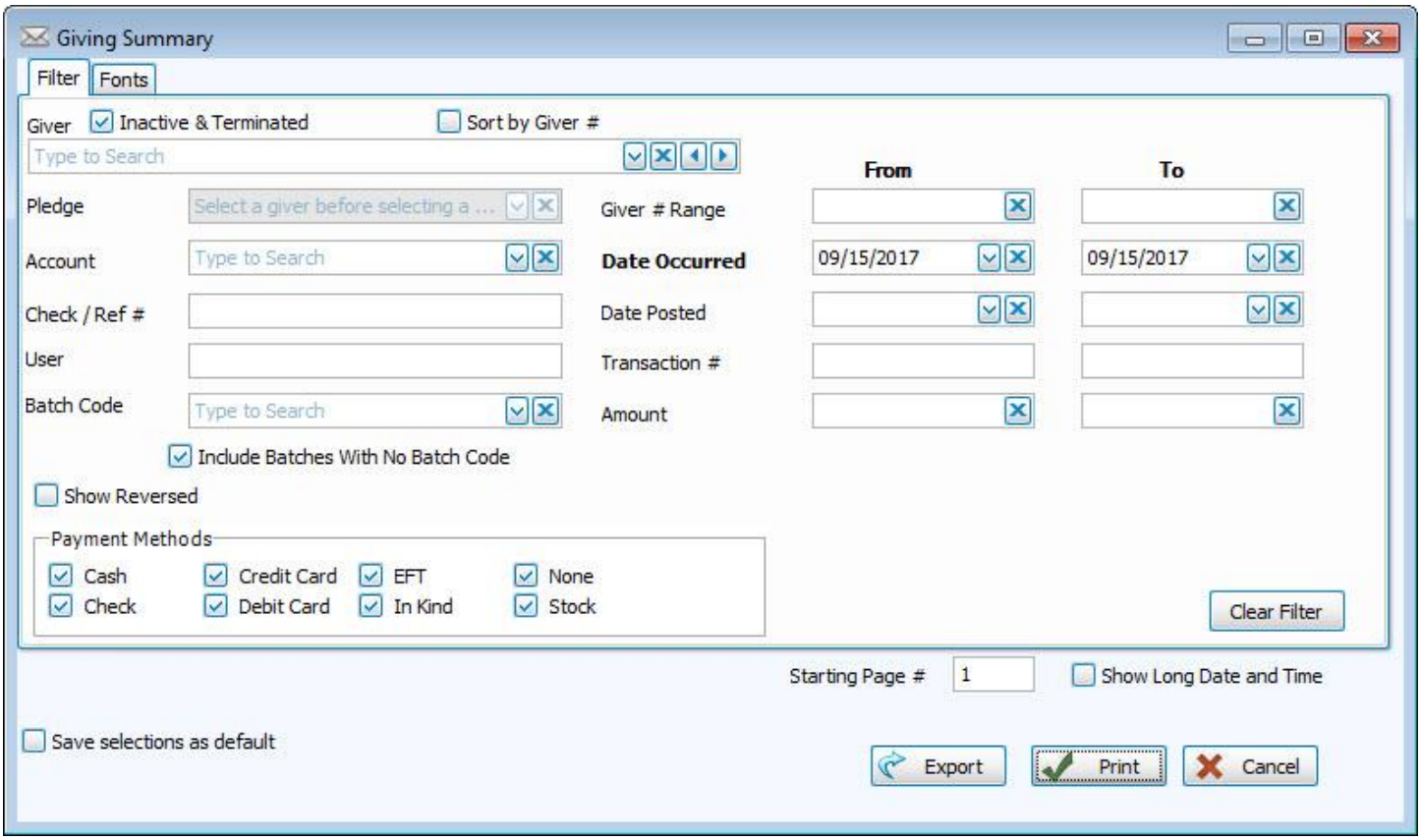
The Giving Summary is a listing of the total donations by the date on which the donation took place, broken down by the amounts posted to each giving account. **Donations** entered with batch codes will appear distinctly according to the batch code for the date.

To view or print the Giving Summary:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Donations Reports** button that appears below.

3. Click the **Giving Summary** button that appears in the adjacent menu.



Use the options on the **Filter Tab** *(pg 281)* to specify the kind of information you want the Giving Summary to contain.

To change the typeface of the report contents, click the **Fonts Tab** *(pg 295)* to make the desired changes.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Deposit Slip

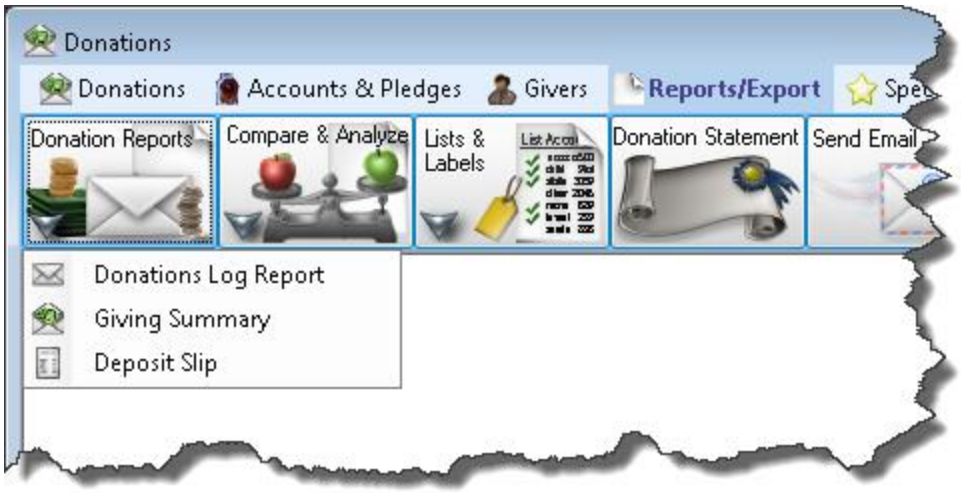
The **Deposit Slip** report pulls up information about the check and cash donations that have been on a specific day, which are to be deposited into a specific bank account (or other asset).

To view or print the Deposit Slip:

1. From The Initial Portal of Church Windows choose either:
   Donations

- Click **Reports/Export** in the **Button Bar** at the top of the screen.

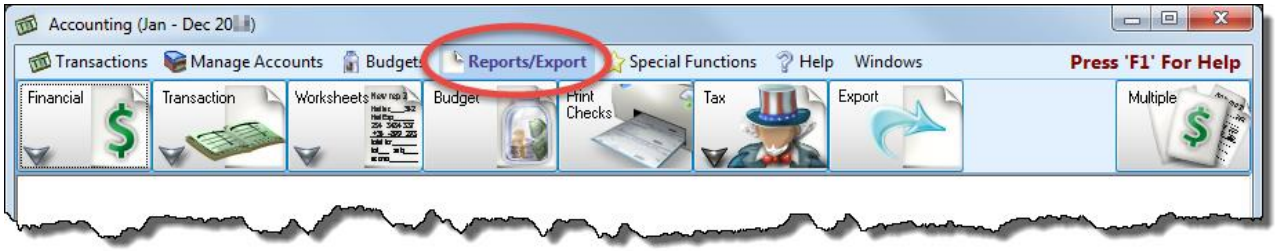
- Click the **Donations Reports** button that appears below.



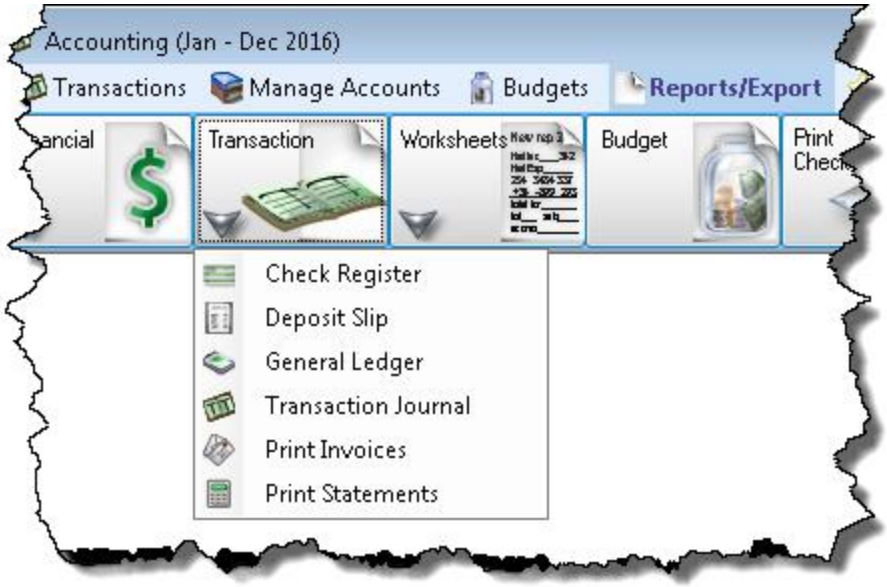
OR

Accounting

- Click **Reports/Export** in the **Button Bar** at the top of the screen.

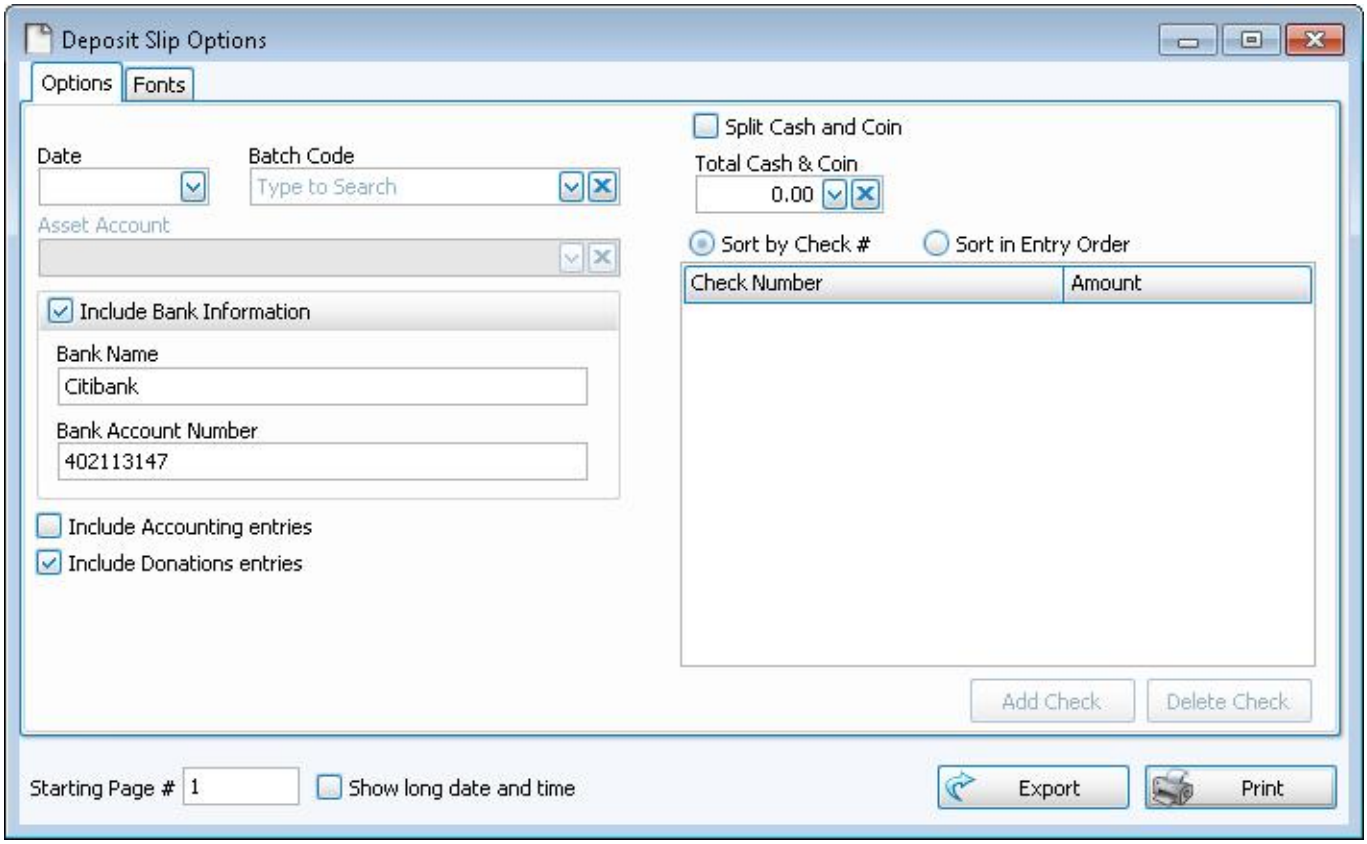


- Click the **Transaction** button and a menu will show the option for **Deposit Slip**.



2. Choose the **Deposit Slip** option.

3. The **Deposit Slip** screen will appear:



> **Note:**
>
> *Before beginning, complete the* ***Transfer Donations to Accounting*** *(pg 66) procedure for all the transactions you wish your* ***Deposit Slip*** *to show.*

4. By default, the **Deposit Slip** Options screen is set to show you both **Donations** and **Accounting** entries:
   - Place a ☑ checkmark in the **Include Accounting entries** box to display items that were entered in **Accounting**.
   - Place a ☑ checkmark in the **Include Donations entries** box to display items that were entered in **Donations**.
5. **Date** —
   Choose the day that the donations were given.

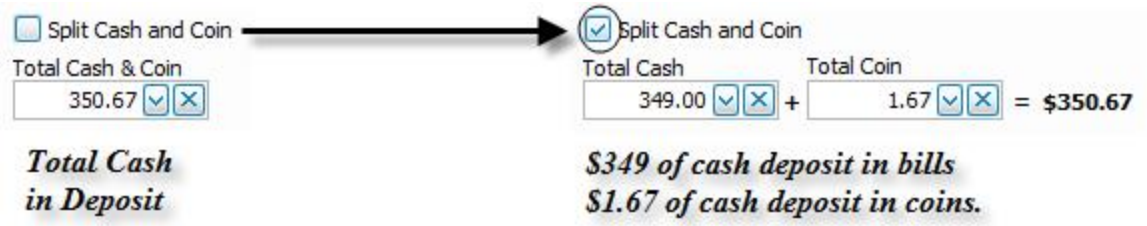
6. **Batch Code** —
   If you would like information that pertains to only a specific batch of donations on the selected date, choose that batch from the box.

7. **Asset Account** —
   If you have chosen to include **Accounting** entries, be sure to select the account to which you will be depositing your donations.

8. The **Check Number** and the **Amount** of the donations made by check for the selected date and Asset Account will appear in the list on the right side of the screen. Any bank information stored under the selected Asset Account in **Accounting** will also appear.

9. **Include Bank Information** —
   Place a checkmark in this box to print the bank information on the report.

10. **Total Cash & Coin** —
    The total of the donations made in cash will appear at the top of the screen in the box.
    - If you need to separate the amount of cash given in bills and the amount of cash given in coins, click the **Split Cash and Coin**.
    - The one box separates into two boxes for you to enter the **Total Cash** and **Total Coin**.
    - As you enter the total cash and total coin, the amounts will be compared against a total of both items:



11. Under the **Cash & Coin** options, a list of checks will show any donations made with a check.

12. Choose between **Sort by Check #** and **Sort in Entry Order** to change the order in which the checks appear.
    - Clicking the **Sort by Check #** option will place the items in the list in order according to the check number.
    - If you click **Sort in Entry Order**, the list will reorder the items and place them according to when they were entered into **Donations** or **Accounting**.

13. Click the **Add Check** button to add any check items that you will be making with this deposit and want to show on the **Deposit Slip**.

14. To remove any items, click the desired item and click **Delete Check**.

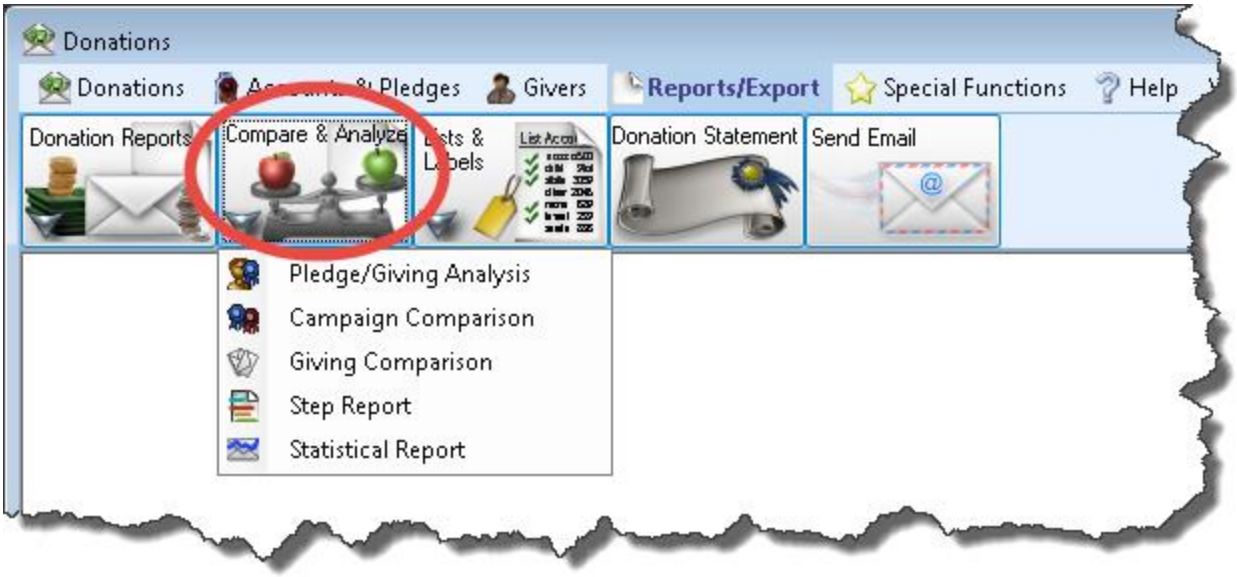
> **Note:**
>
> *The cash and check items and amounts displayed on the **Deposit Slip** Options screen ONLY affect the appearance of the report. No changes will be made to the donations as they were originally entered and stored in the software. Therefore, when you close the screen, any cash or check information you have added, changed, or removed will not be saved.*

15. Click the **Fonts Tab** *(pg 295)* to make any changes to the style and/or size of the typeface printed on the report.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Compare & Analyze

The options under **Compare Analyze** in the Donation **Reports/Export** menu in the **Button Bar** at the top of the screen are:



- **Pledge / Giving Analysis** *(pg 203)*
- **Campaign Comparison** *(pg 207)*
- **Giving Comparison** *(pg 212)*

- **Step Report** *(pg 216)*
- **Statistical Report** *(pg 220)*

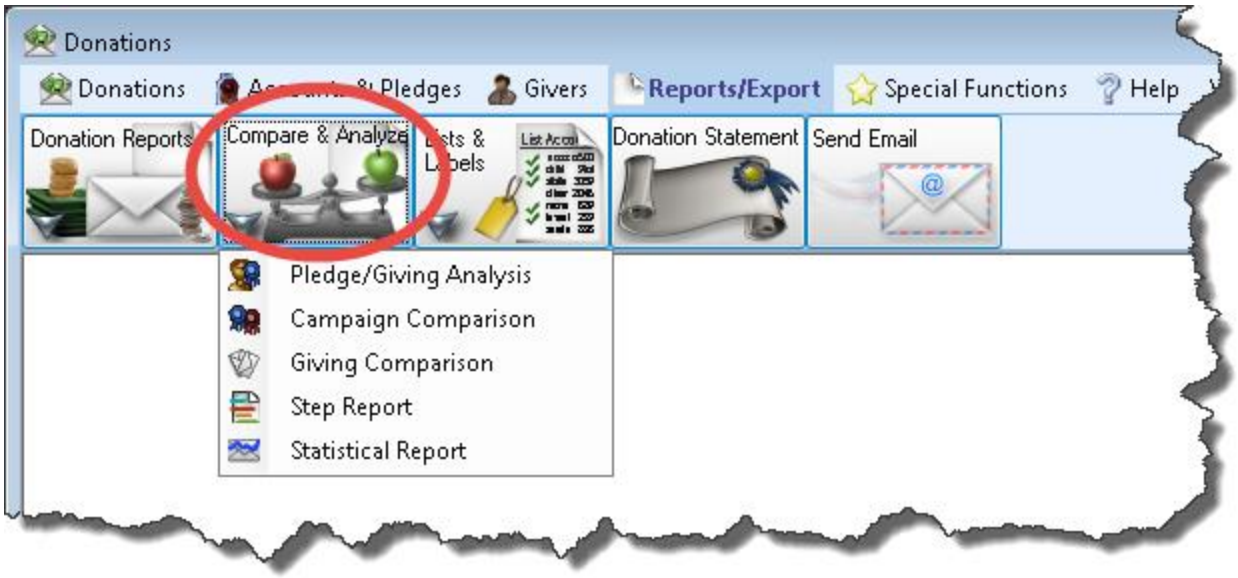
Pledge / Giving Analysis

For each Giver, the **Pledge / Giving Analysis** presents a comparison of money given to Giving Accounts against money pledged to each one. This is also one of the most flexible reports in Donations.

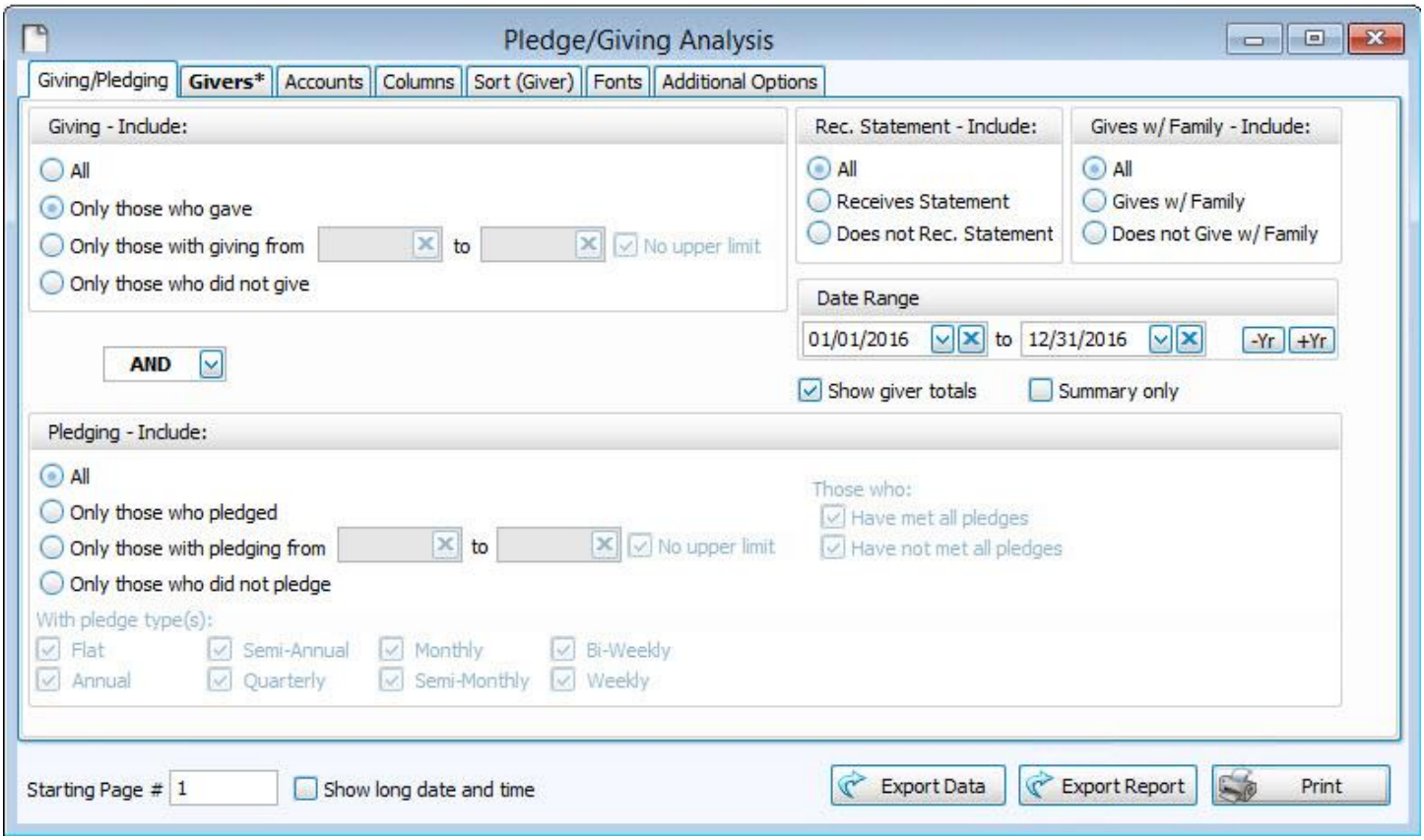
To view or print the Pledge / Giving Analysis:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Compare & Analyze** button that appears below.

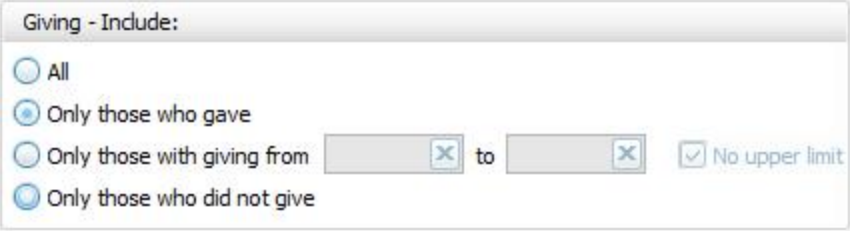


3. Click the **Pledge / Giving Analysis** button that appears in the adjacent menu It will open to the Giving / Pledging tab:



Giving — Include

Choose the option that best describes the Giving information you wish to see:



- **All** — Click this option to have all kinds of Givers regardless of their giving included.
- **Only those with giving from** — Enter a desired range of donation dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who gave**
- **Only those who did not give**

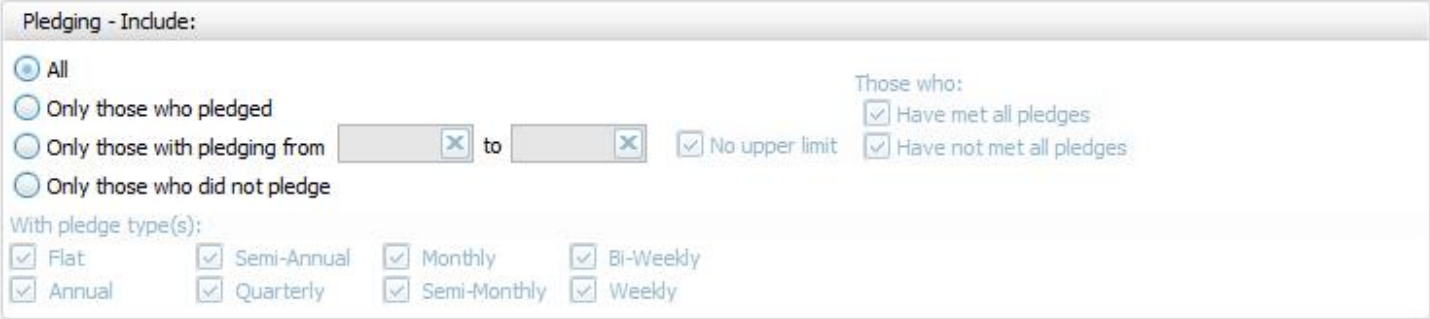
AND / OR

Between the ***Giving — Include*** and ***Pledging — Include*** areas of the screen, use the **AND** / **OR** dropdown box to specify how the criteria must be fulfilled:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.

Pledging — Include

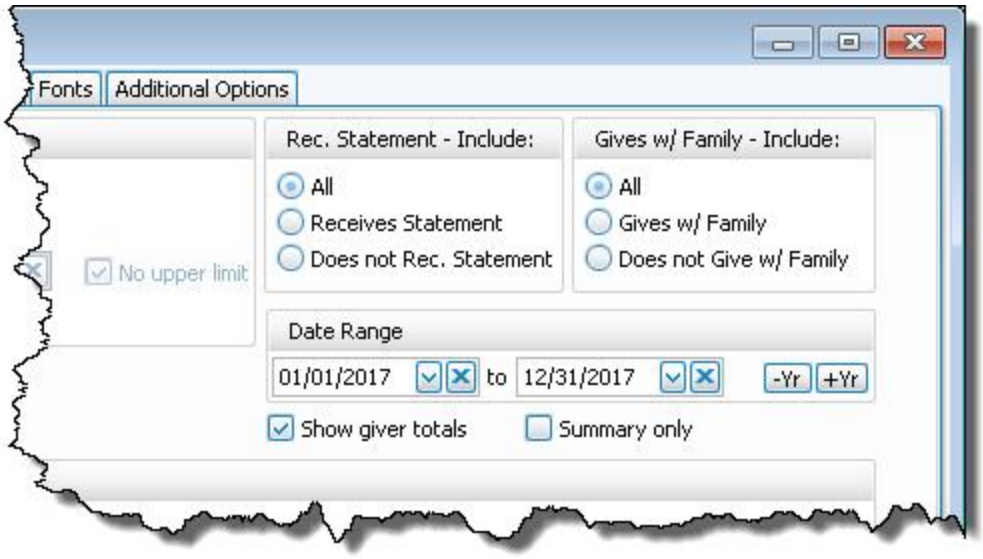
Choose the option that best describes the information regarding **Pledges** *(pg 98)* that you wish to see on your report:



- **All Givers** — Includes all Givers regardless of Pledging.
- **Only those with pledging from** — Enter a desired range of pledge dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who pledged**
- **Only those who did not pledge**
- **Those who:**If applicable, place or remove a ☑ checkmark for **Have Met All Pledges** and/or **Have Not Met All Pledges**.
- **With Pledge Type(s):** Place a ☑ checkmark next to any or all frequencies of pledges you want to include on the report.

Other Options

At the top right of the Giving / Pledging tab there are sometimes a few more options, these include:



- **Receives Statement** *(pg 158)* — specify if you only want to see those who do or only those who do not receive statements. (This is not an option on Statements as Givers without "Receives Statement" checked cannot be included)
- **Giving as a Family or Giving Separately** *(pg 158)* — specify if you only want to see those who give alone or only those who give as a family.
- **Date Range** — select the time period that you want the report to present.
- **Show Giver totals** — if you want to see a total for each Giver on the report.
- **Summary only** — if you want to see only the summary, instead of an accompanying, individualized listing by Giver.

Choose any of the following tabs to apply additional settings:

People Selection Criteria / Givers Tab

To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Accounts tab

Specifies that only certain accounts should be included.

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

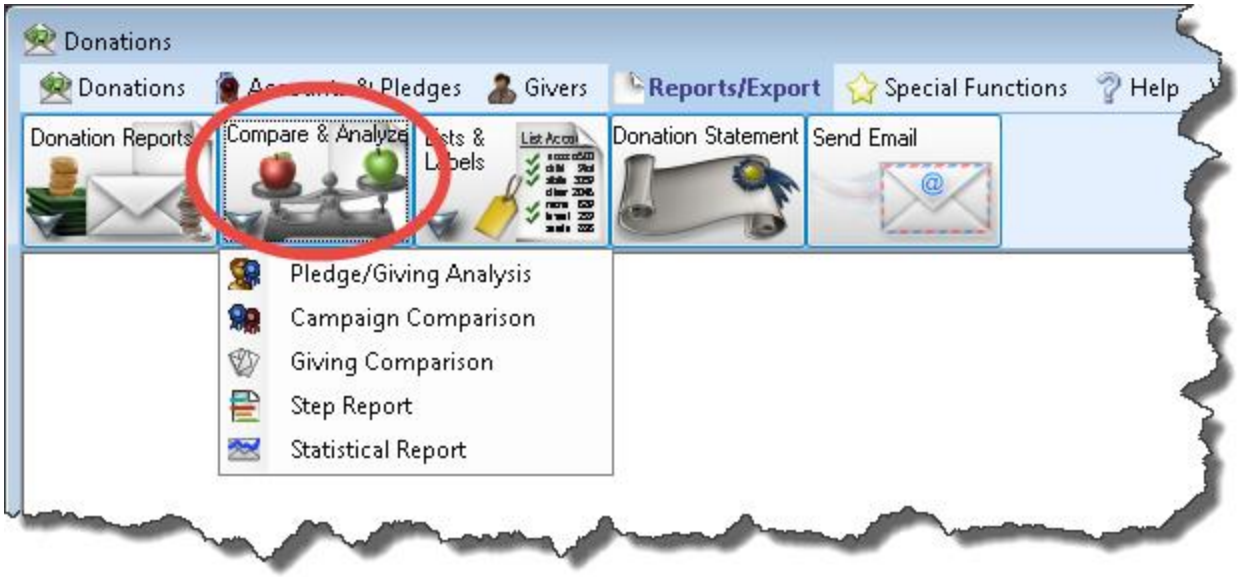
Campaign Comparison

The **Campaign Comparison** is a report that shows the similarities or differences between pledging campaigns and its participants.

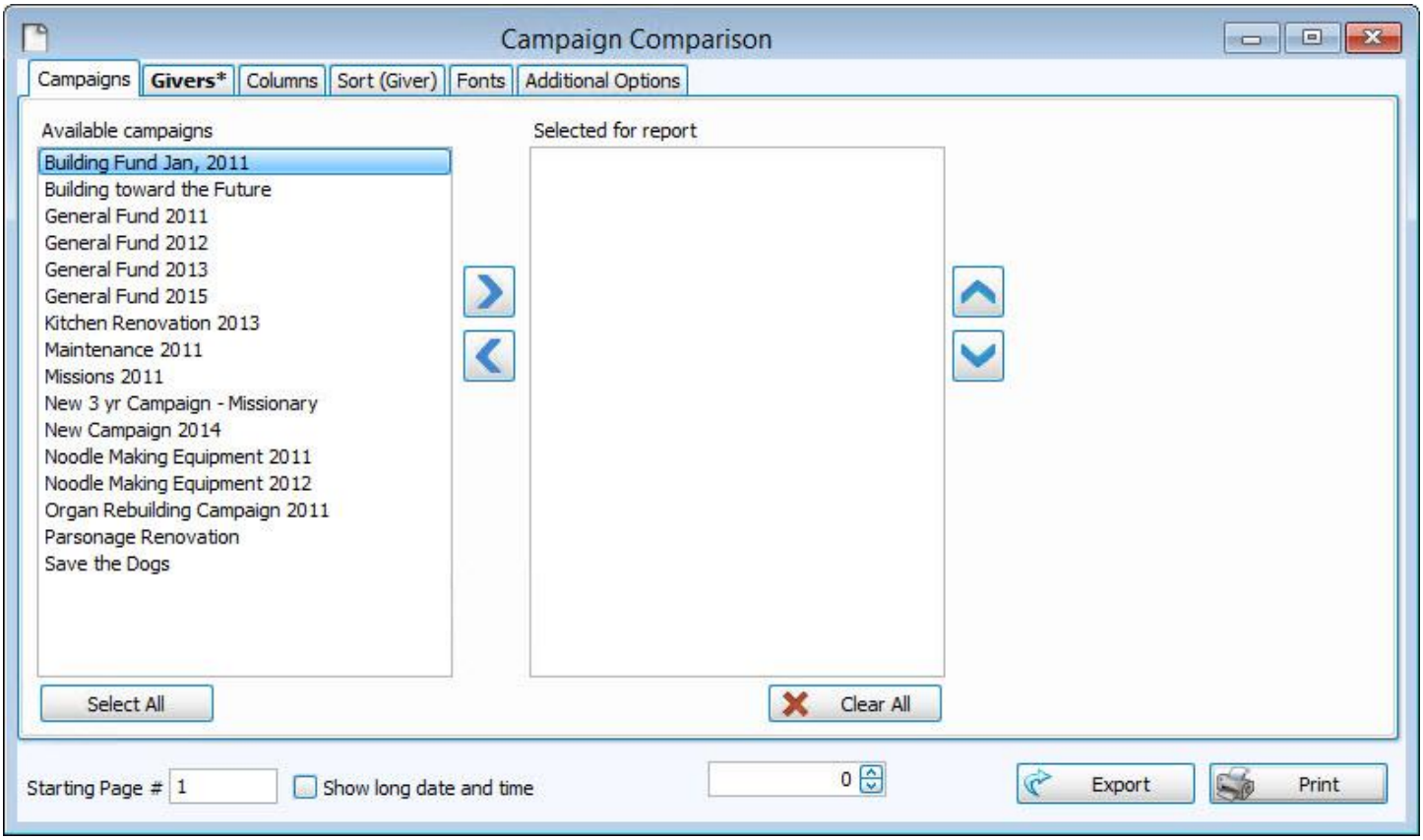
To view or print the Campaign Comparison:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Compare & Analyze** button that appears below.



3. Click the **Campaign Comparison** button that appears in the adjacent menu.



From the list of **Available campaigns** click the pledge campaign(s) that you want the report to show and click the right button. The campaigns that show in the **Selected for report** list will appear on the report. For any items that you do not want the report to show, click the desired campaign name and click the left button.

Choose any of the following tabs to apply additional settings:

People Selection Criteria / Givers Tab

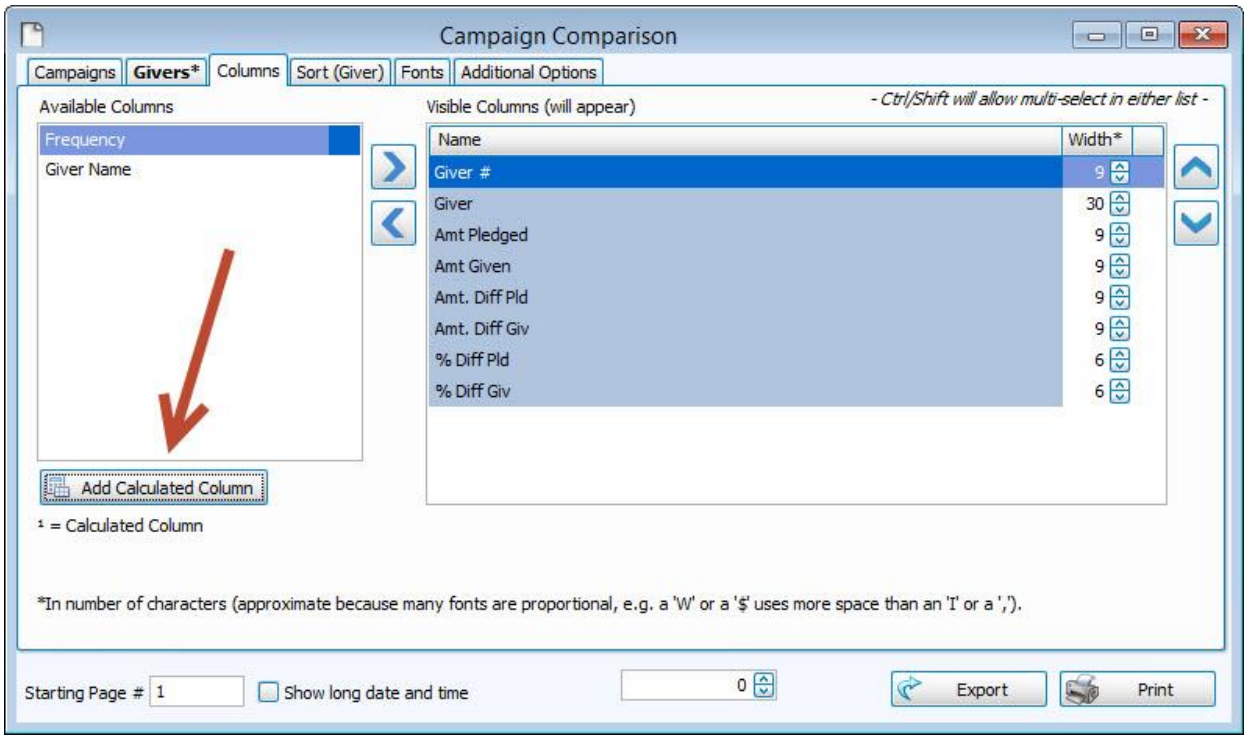
To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Columns Tab

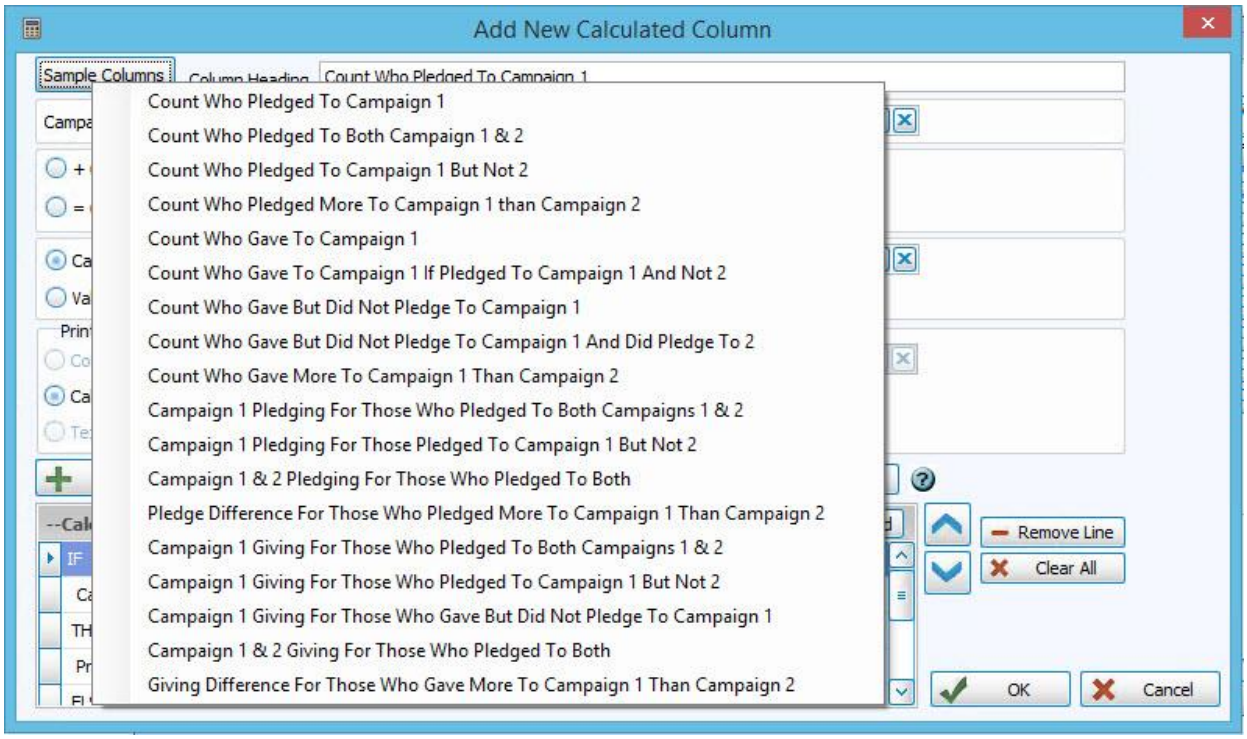
Determines the order and the appearance of the columns displayed.

Additionally, this tab gives you the ability to add custom calculated columns:

Add Calculated Column

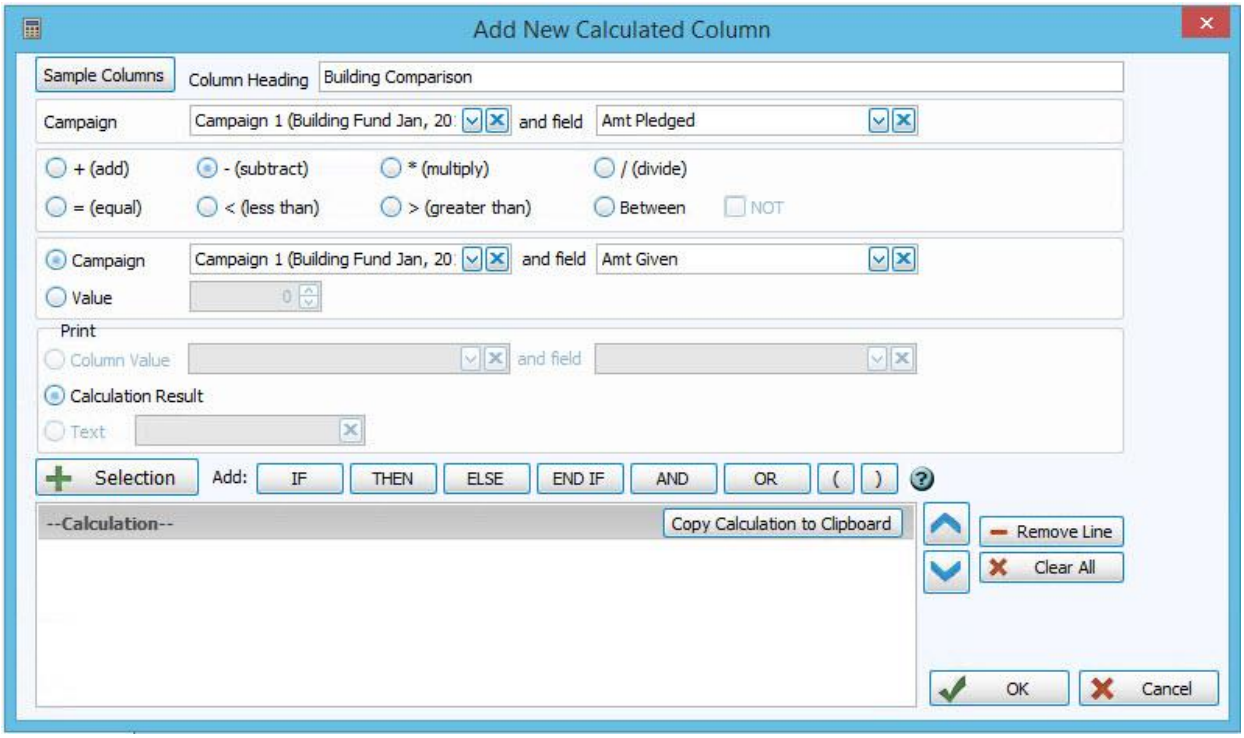


The **Sample Columns** button at the top left will give you common calculations that might be desired:



Selecting any of these will automatically fill in the fields with the specific calculation details to save time. You could also manually select calculations.

For example, to subtract an amount given from amount pledged n a building campaign, as shown:



You can click on the [+ Selection] **Add** button to add the calculated selection below. You can add multiple calculated columns or just one, as needed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

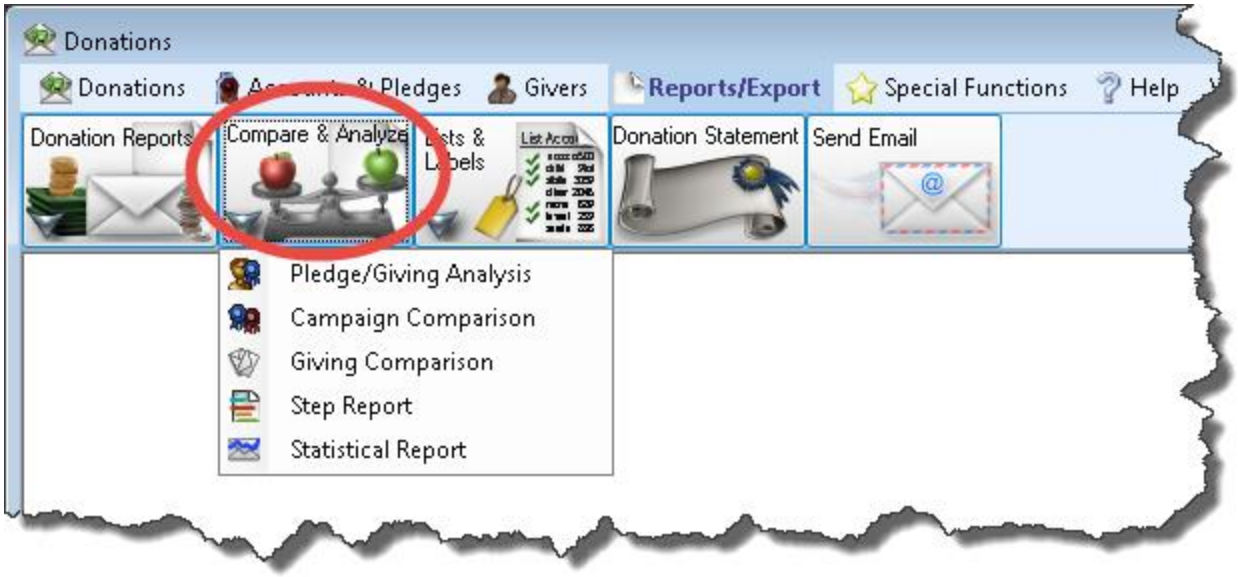
Giving Comparison

The **Giving Comparison** report is a listing of the similarities or differences in giving between specified time periods.

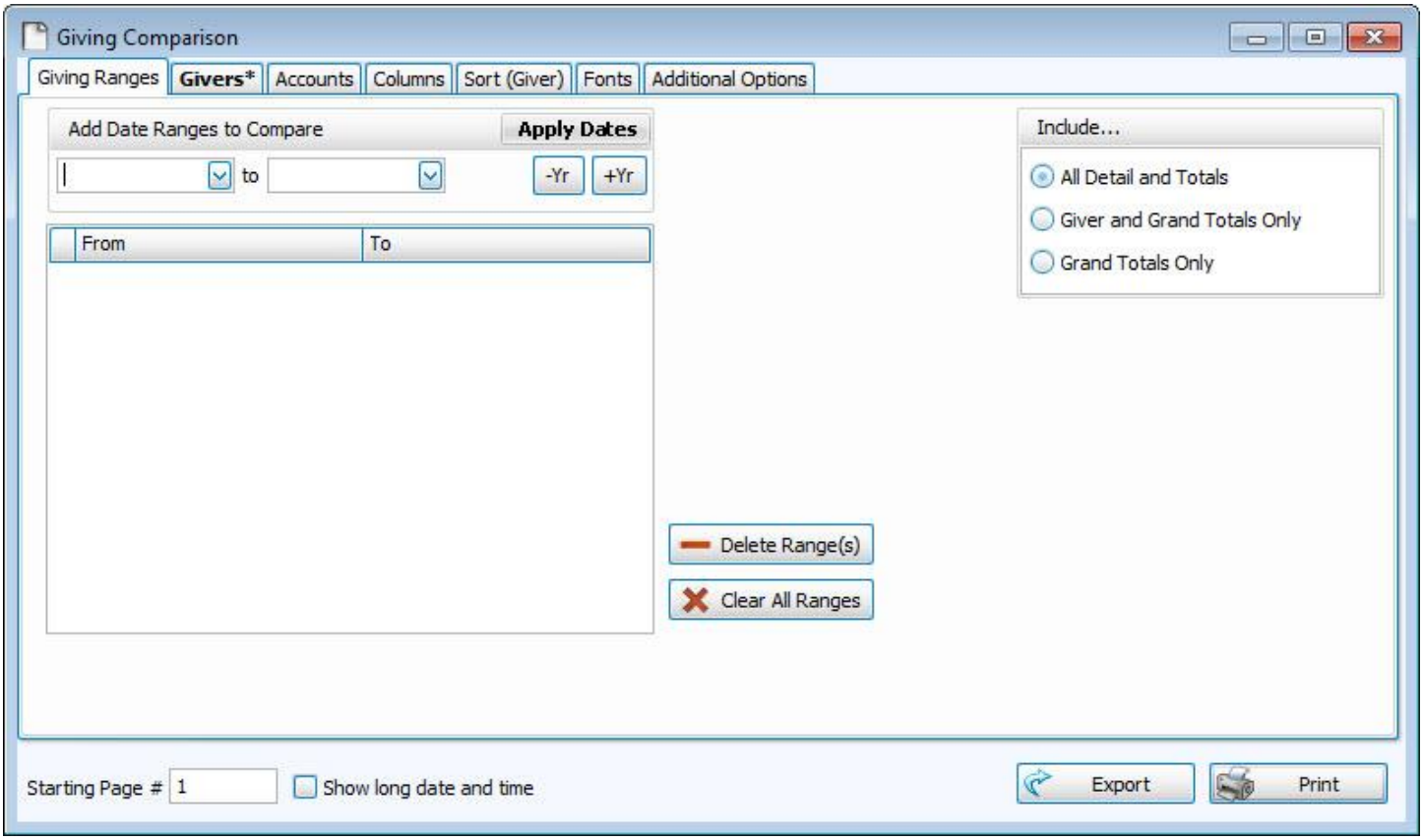
To view or print the Giving Comparison:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Compare & Analyze** button that appears below.



3. Click the **Giving Comparison** button that appears in the adjacent menu.



Add Date Ranges to Compare

Enter a **beginning date** and an **ending date** that represents your first desired time span. Then press **+ Add Range** and that time frame will be added to the list below. The time frames you accumulate in the list will be compared on the report that you run. Continue adding as many ranges as you wish to compare.

Include...

There are three formatting choices for this report:

1. **All Detail and Totals**

   This will show the total each Giver gave to each account in each date range:

41st Church of Anytown - Columbus OH
Giving Comparison

Wednesday, November 28, 2018 **Page 1 of 10**

Giver Name Account Name	01/01/2017 - 12/31/2017 (1)	01/01/2018 - 12/31/2018 (2)	Diff. Given (1) - (2)
4 - Lucy M Paige			
General fund	30.00	0.00	(30.00)
Missions	0.00	50.00	50.00
	$30.00	$50.00	$20.00
8 - Mel L Miller			
General fund	175.00	50.00	(125.00)
Building Fund	10.00	0.00	(10.00)
Church School Contribution	5,000.00	0.00	(5,000.00)
	$5,185.00	$50.00	($5,135.00)

2. **Giver and Grand Totals Only**

   This will show the total each giver gave in each date range:

41st Church of Anytown - Columbus OH
Giving Comparison

Wednesday, November 28, 2018 **Page 1 of 3**

Giver Name	01/01/2017 - 12/31/2017 (1)	01/01/2018 - 12/31/2018 (2)	Diff. Given (1) - (2)
4 - Lucy M Paige	$30.00	$50.00	$20.00
8 - Mel L Miller	$5,185.00	$50.00	($5,135.00)
9 - Penny K Morris	$185.00	$16,700.00	$16,515.00
10 - Morgan F Robertson	$45.00	$100.00	$55.00

3. **Grand Totals Only**

   This will show only the entire total given to each account in each date range and will not show any individual giver totals:

41st Church of Anytown - Columbus OH
Giving Comparison

Wednesday, November 28, 2018 — Page 1 of 1

	01/01/2017 - 12/31/2017 (1)	01/01/2018 - 12/31/2018 (2)	Diff. Given (1) - (2)
Grand Totals	$27,123.00	$100,605.14	$73,482.14

Count: 74
Accounts selected: All accounts
Includes Members, Visitors.

Choose any of the following tabs to apply additional settings:

People Selection Criteria / Givers Tab

To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Accounts tab

Specifies that only certain accounts should be included.

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

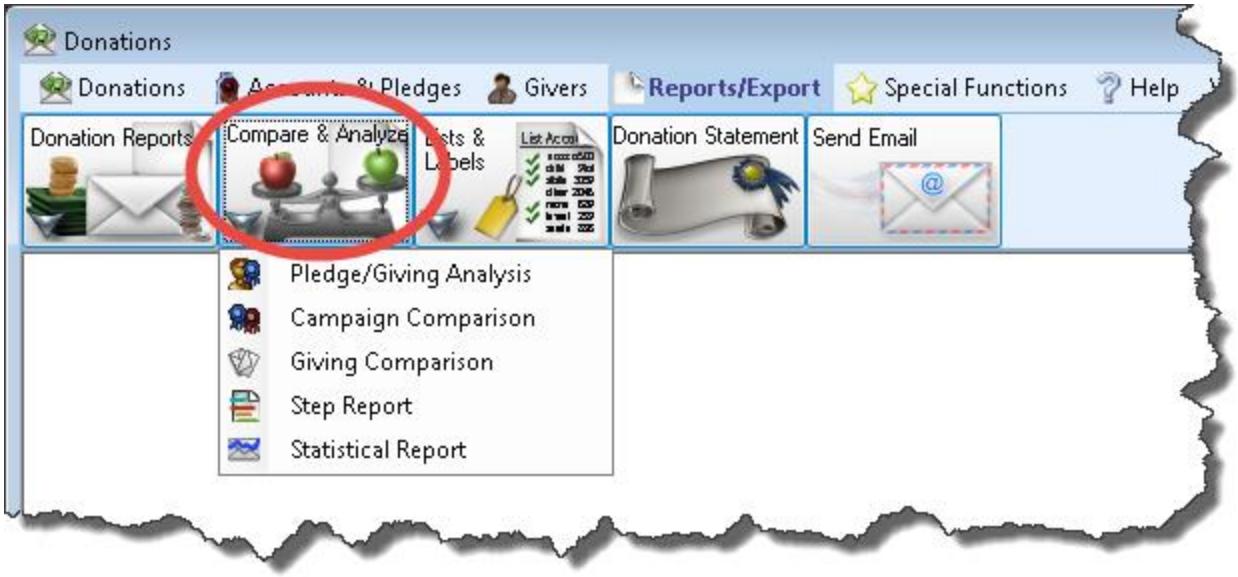
Step Report

The **Step Report** breaks down either giving or pledge amounts into levels, or steps, and presents the number of people in the congregation who give or pledge within each step.

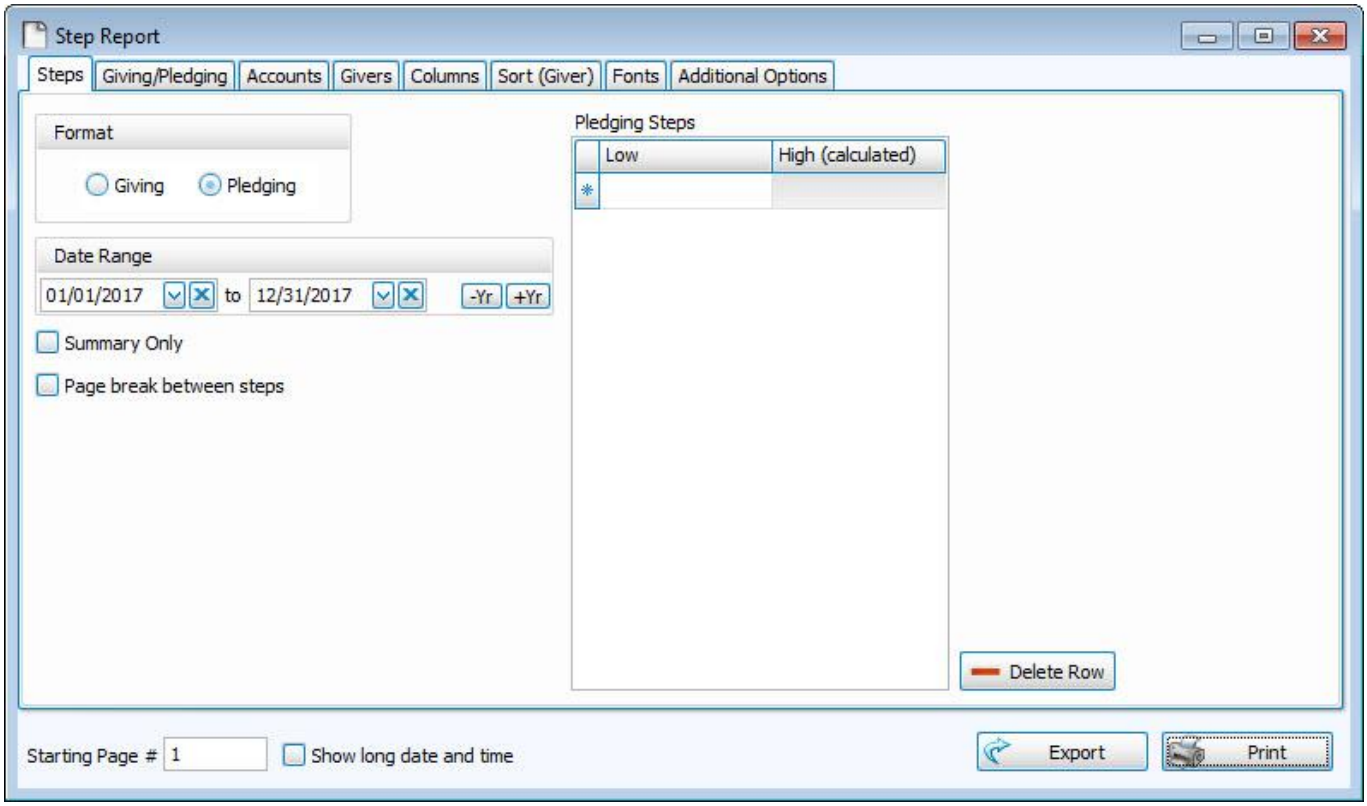
To view or print the Step Report:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

2. Click the **Compare & Analyze** button that appears below.



3. Click the **Step Report** button that appears in the adjacent menu.



4. Choose the format of your report by clicking either **Giving** or **Pledging**.

5. Choose the **Date Range** for the report.

6. Choose any of the following options as they apply to your requirements of the report:

   - **Summary Only:** Place a checkmark in this box if you want only the total amounts for each step.If you do not place a checkmark in this box, each step of the report will also present all who gave or pledged an amount that falls within the step.

   - **Page break between steps:** Place a checkmark in this box to start a new page of the report for each step. If you do not place a checkmark in this box, the information will completely fill each page.

7. On the right side of the screen, enter the **Giving Steps** or **Pledging Steps**, depending on the kind of **Step Report** you plan to run:

Low	High (calculated)
100.00	199.99
200.00	299.99
300.00	399.99
400.00	No upper limit

As you enter the beginning "**Low**" dollar amount for each step, the ending "**High**" dollar amount for each preceding step will automatically adjust. And, the beginning "**Low**" amount for the last step that you enter will then include any dollar amount beyond it, and indicate on the screen that the step has **no upper limit**.

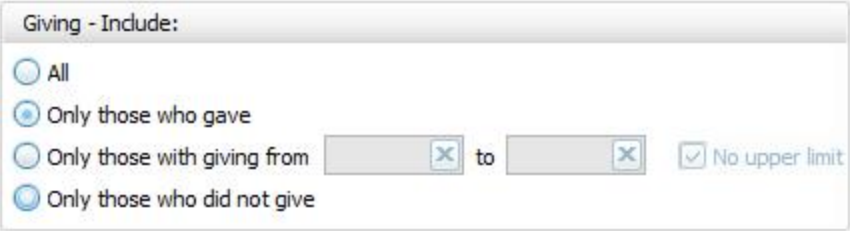
> **Note:**
>
> *If you need to remove a step, click the line and hit the **Delete Row** button.*

Choose any of the following tabs to apply additional settings:

Giving / Pledging Tab

Giving — Include:

Choose the option that best describes the Giving information you wish to see on your report:



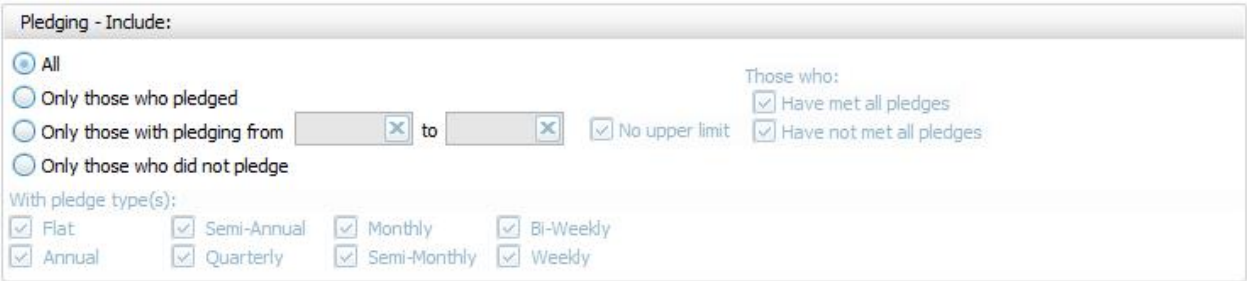
AND / OR

Use the dropdown to specify how the criteria must be fulfilled in order to generate your report:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.

Pledging — Include

Choose the option that best describes the Pledging information you wish to see on your report:



Accounts tab

Specifies that only certain accounts should be included.

People Selection Criteria / Givers Tab

To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

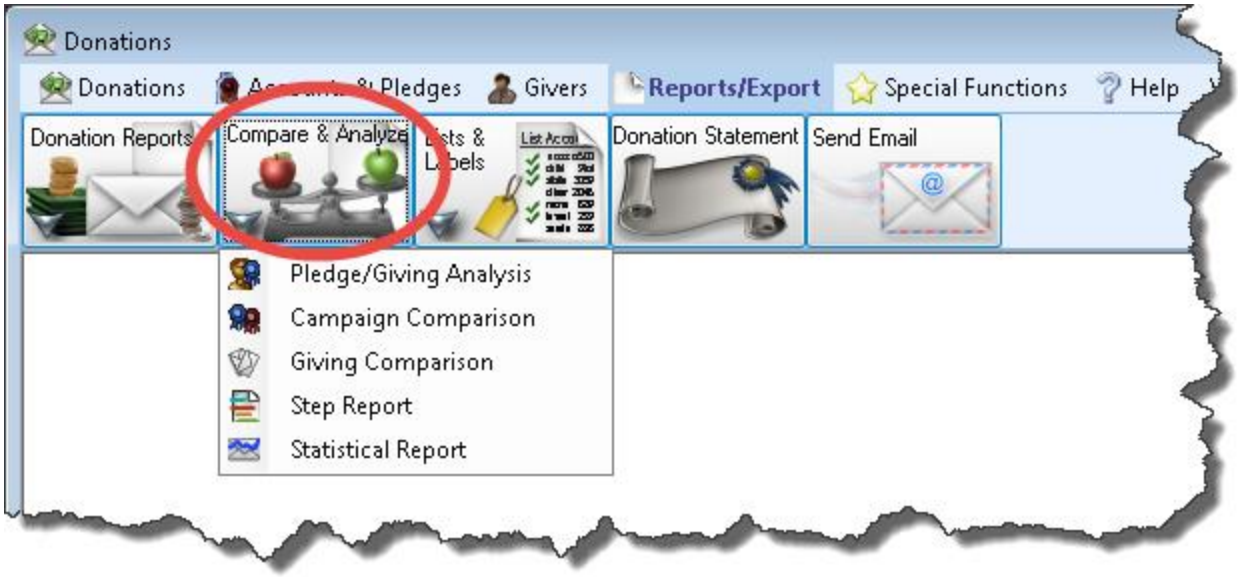
Statistical Report

This report is a quick and easy way to run a report of statistics about general giving information.

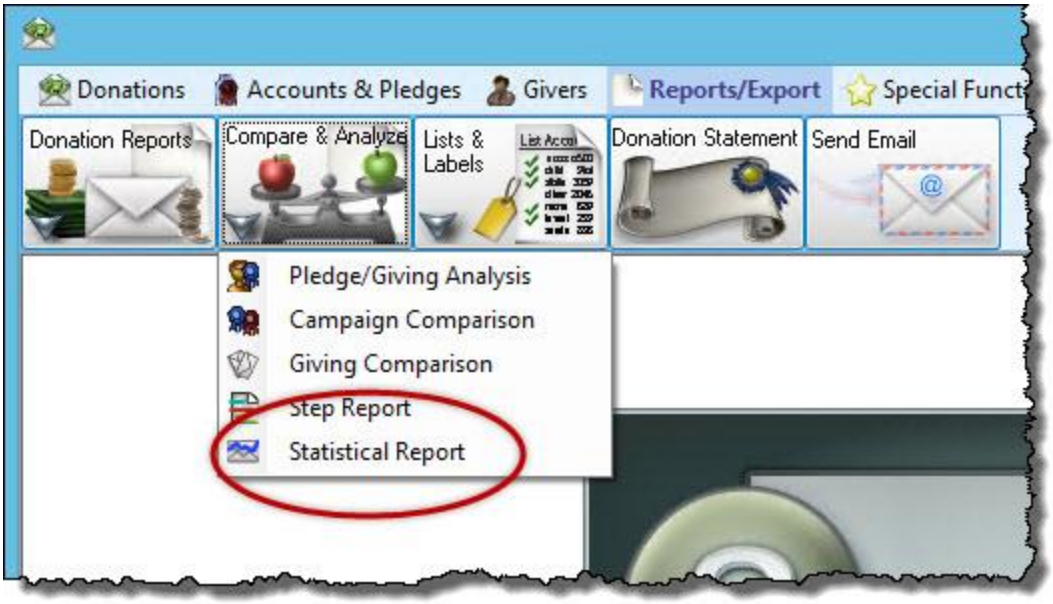
To view or print the Statistical Report:

1. Click **Reports/Export** in the **Button Bar** at the top of the screen.

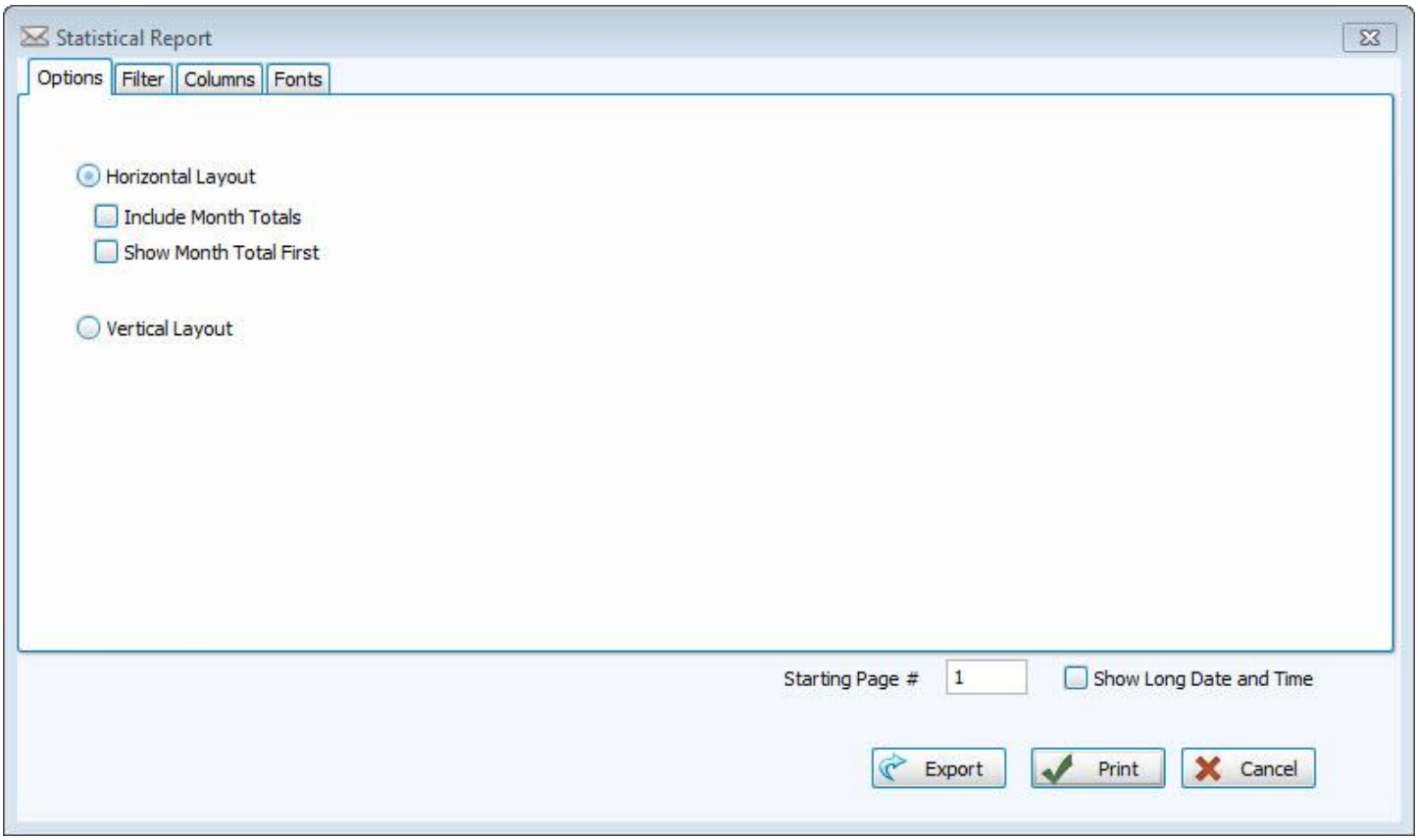
2. Click the **Compare & Analyze**button that appears below.



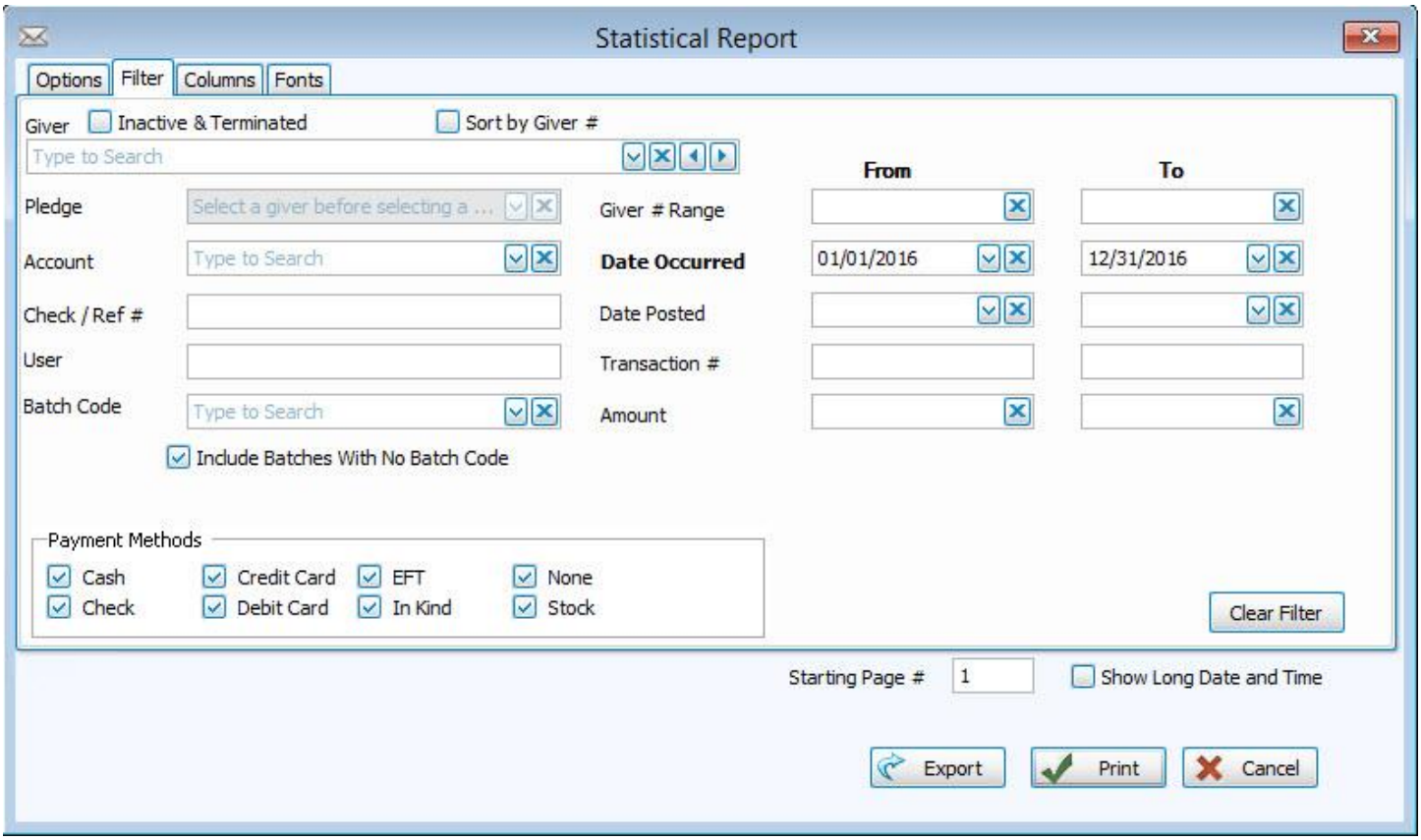
3. Click the **Statistical Report** button that appears in the adjacent menu.



This will open up the **Statistical Report** screen to the **Options** tab. Here you can select if you want a **Horizontal** or **Vertical** layout. If you select a **Horizontal** layout, you can also choose whether or not to "*Include Month Totals*" and to "*Show Month Total First*":



You can click **Print** here to get the generic report for the year including dates and totals, or click the **Filter Tab** *(pg 281)*, to change the options and get very specific information:



This is where you can choose certain **Givers**, Pledges *(pg 98)*, **Accounts**, Batch Codes *(pg 53)*, **dates**, even **transaction numbers**, **amounts**, and **payment methods**.

Choose any of the following tabs to apply additional settings:

Columns Tab

Determines the order and the appearance of the columns displayed.

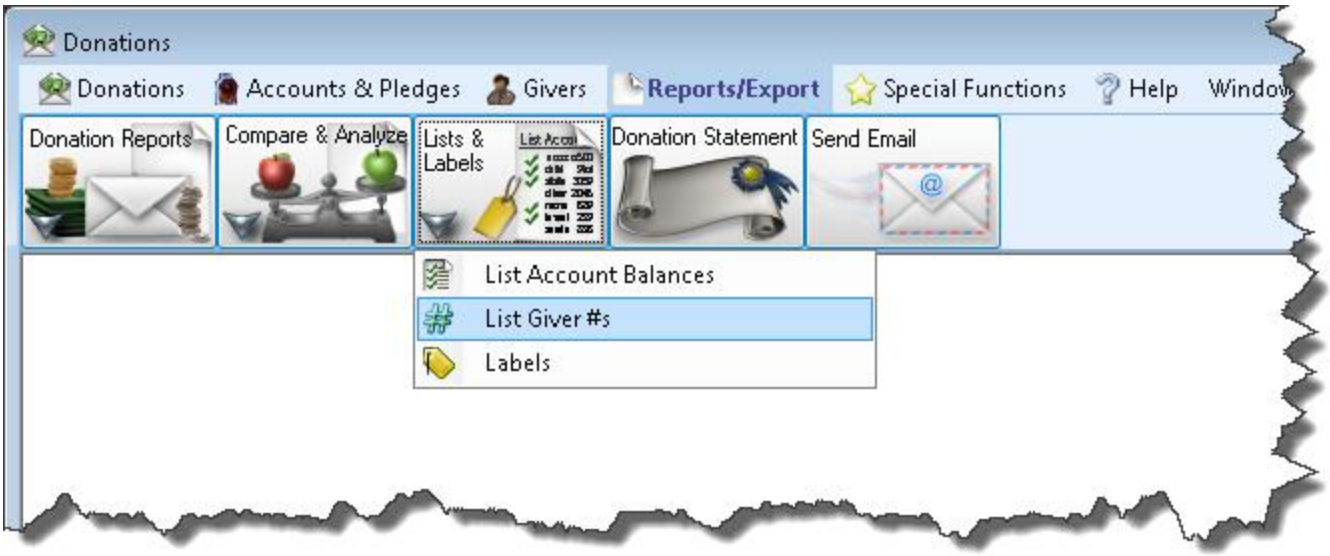
Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Lists & Labels

The options under the Donation Reports **Lists & Labels** menu are:



- **List Account Balances** *(pg 224)*
- **List Giver #s** *(pg 226)*
- **Labels** *(pg 229)*

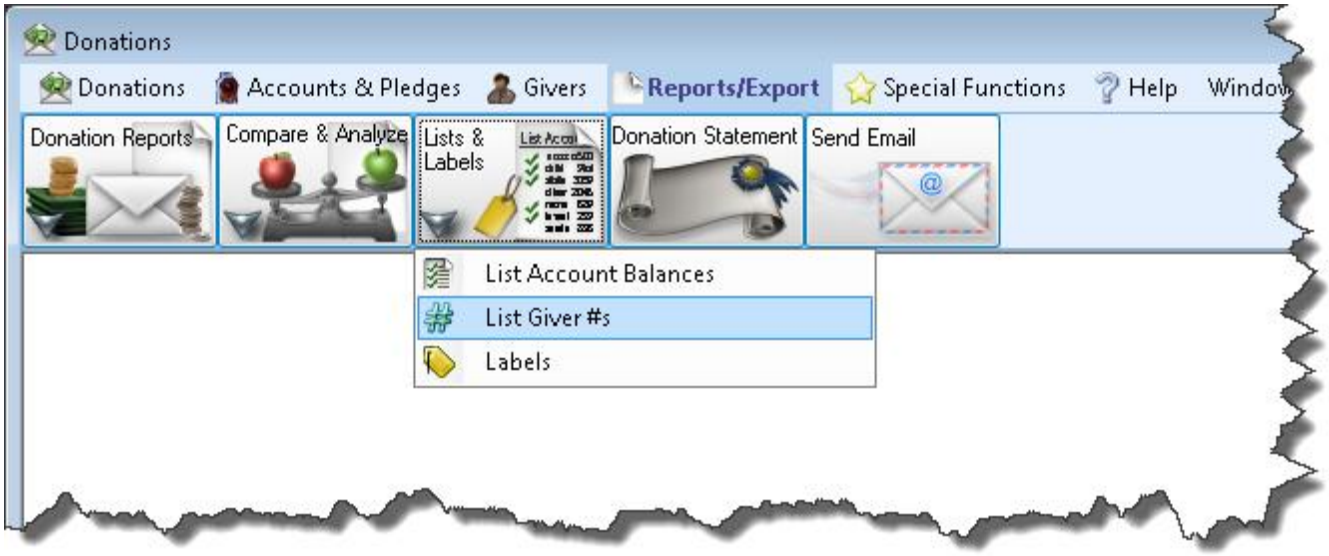
List Account Balances

Use the **List Account Balances** feature in **Donations** to generate a report that lists the balances for all the accounts.

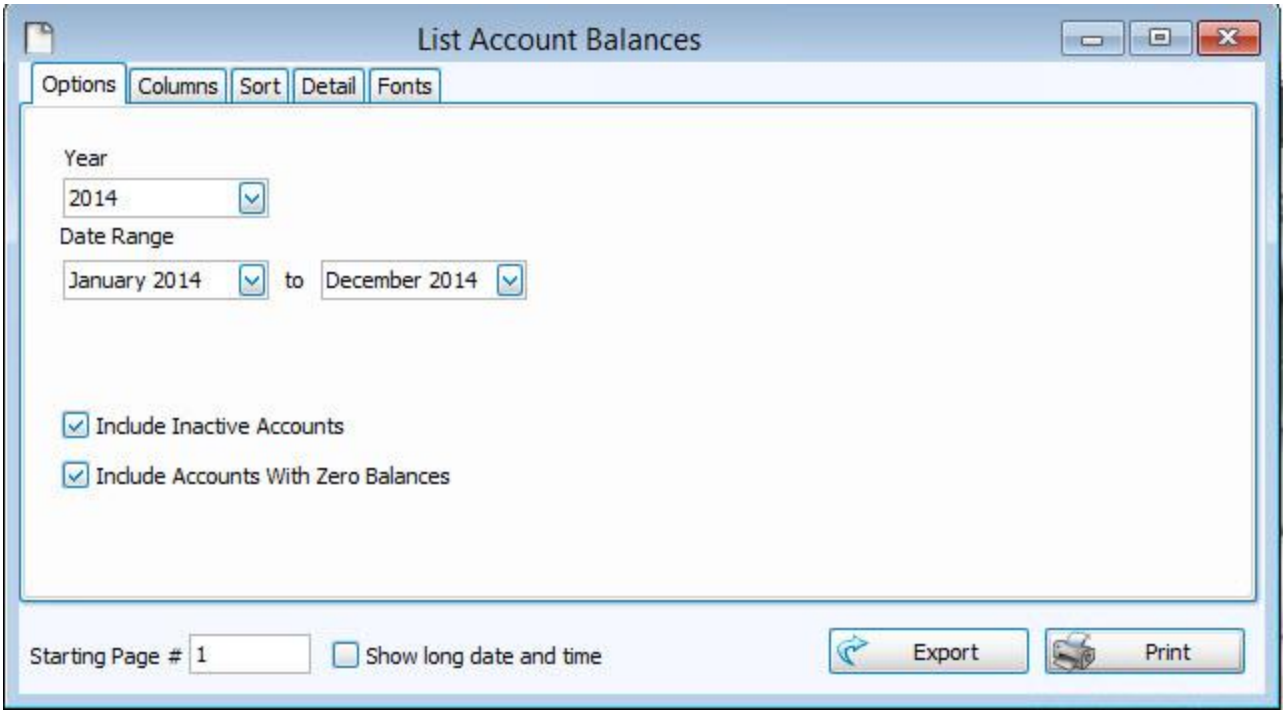
To run the report:

- From The Initial Portal of Church Windows choose Donations
- Click **Reports/Export** in the **Button Bar** at the top of the screen.

- Click the **Lists & Labels** button that appears below.



- Click the **List Account Balances** button that appears in the adjacent menu.



- Choose the desired **Year** and **Date Range** from the boxes located on the screen.
- Click to check the **Include Inactive Accounts** box if you would like the report to also show accounts that have been marked as Inactive on the **Manage Accounts** *(pg 85)* screen.

- Click to check the **Include Accounts with Zero Balances** box if you want the report to also show accounts that have a balance of $0.00.

Choose any of the following tabs to apply additional settings:

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Detail tab

Includes certain accounts / **Subtotals** *(pg 129)* in the report. Click to remove a checkmark that has been placed next to an account / subtotal that you do not want. Otherwise, all accounts / subtotals will show on the report.

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

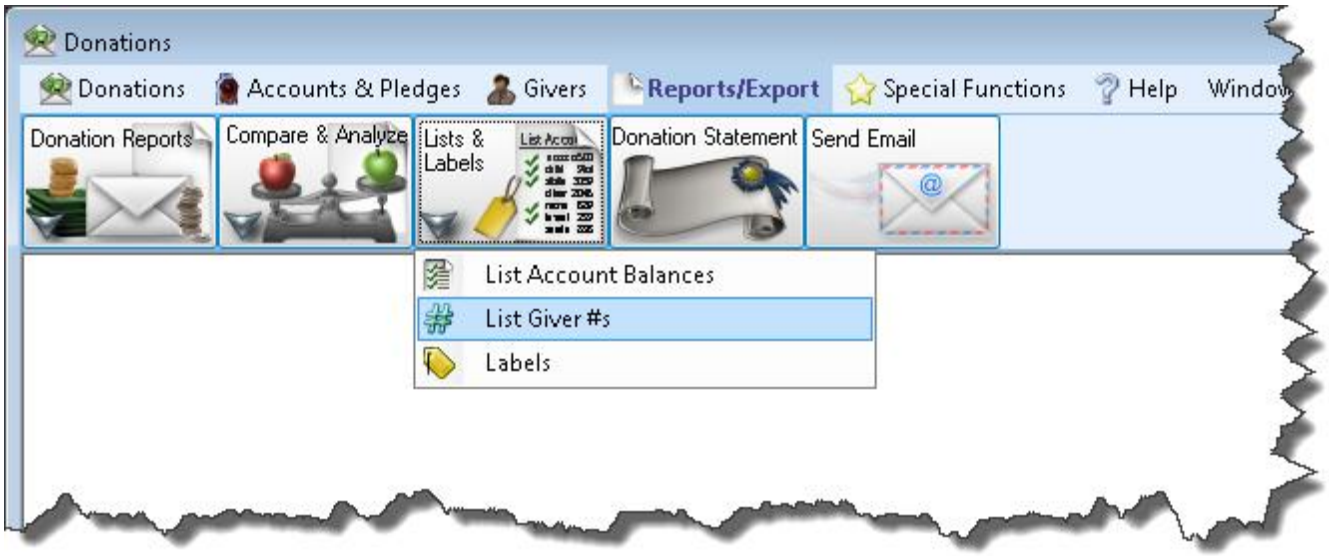
List Giver #s

Use the **List Giver #s** feature to generate a report of Giver numbers that are currently either assigned to a specific Giver, or unassigned — making the number available for future use. Use **Manage Giver Numbers** *(pg 156)* for adding or removing Giver numbers.

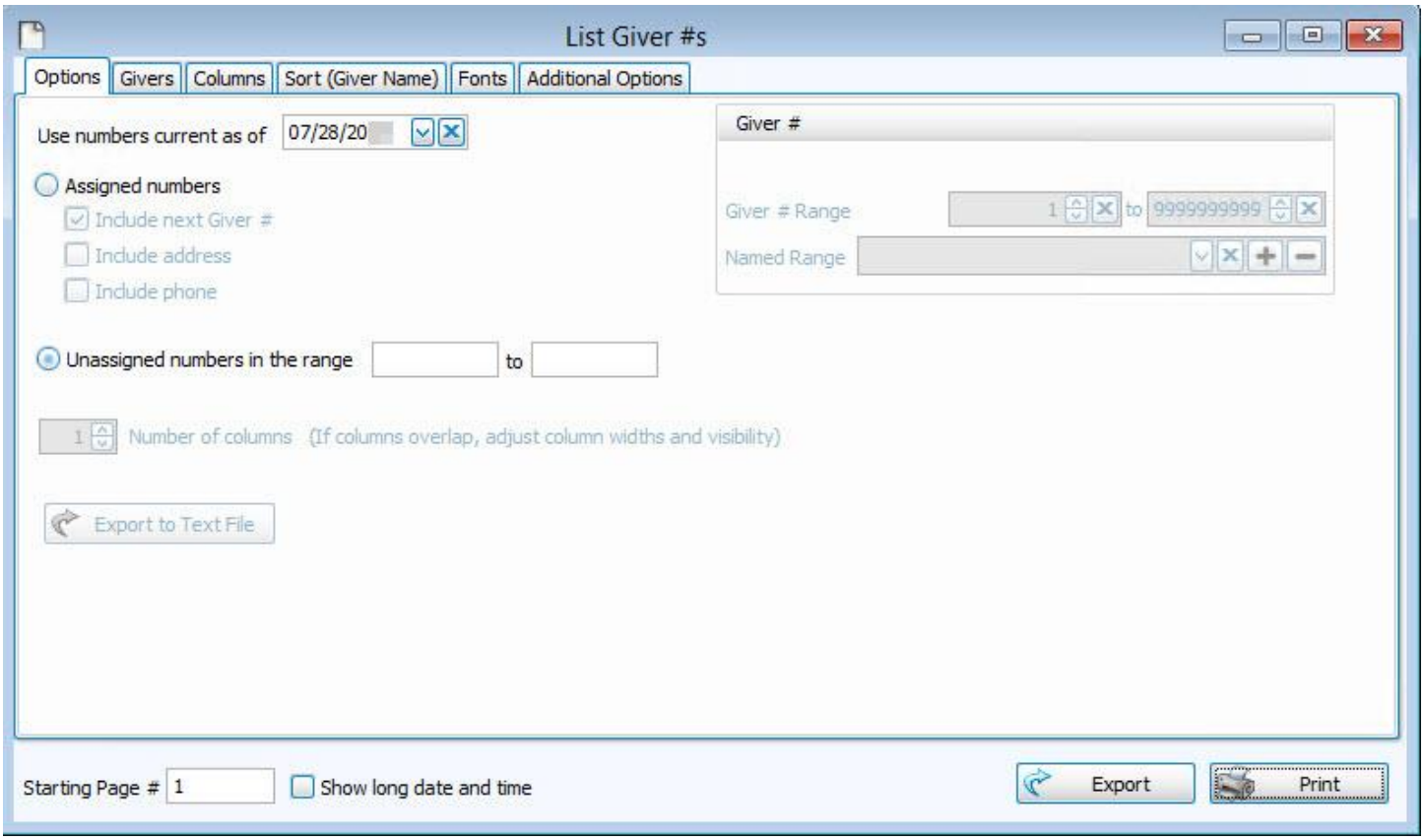
To run the report:

- From The Initial Portal of Church Windows choose **Donations**
- Click **Reports/Export** in the **Button Bar** at the top of the screen.

- Click the **Lists & Labels** button that appears below.



- Click the **List Giver #'s** button that appears in the adjacent menu.



Click the **Use numbers current as of** option if you want a list of numbers in the past or future and enter the desired date in the box, otherwise leave today's date in that box.

You then have two choices for the type of Giver numbers to list:

1. **Assigned numbers** — those currently in use.
    - Enter the **Giver Number Range** to show only the selected span of numbers on the report. If want to use a saved a range of numbers under a reserved name, choose it from the **Named Range** box.
    - Place a check in the box next to any of these options:
        - **Include next Giver #** will prepare the report to show the Giver # assigned after the currently assigned number expires, if any has been assigned.
        - **Include Address** shows the address of the Giver on the report.
        - **Include phone** shows the phone of the Giver on the report.

- To conserve space on the printed report, you can change from a single column layout to a multi-column by changing the **Number of columns**.
- To save the list in a text file, click the **Export to Text File** button.

2. **Unassigned numbers** — those not currently used by any Givers.
   - Enter the number range desired: Unassigned numbers in the range 1 to 300

Choose any of the following tabs to apply additional settings:

People Selection Criteria / Givers Tab

To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Additional Options Tab

Place a ☑ checkmark to select which, if any, **Category** indicators you want to include (e.g. [V] for Visitor, [D] for Donor, etc.)

Once you have made all of your selections, click **Print** to view a Print Preview 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.

Labels

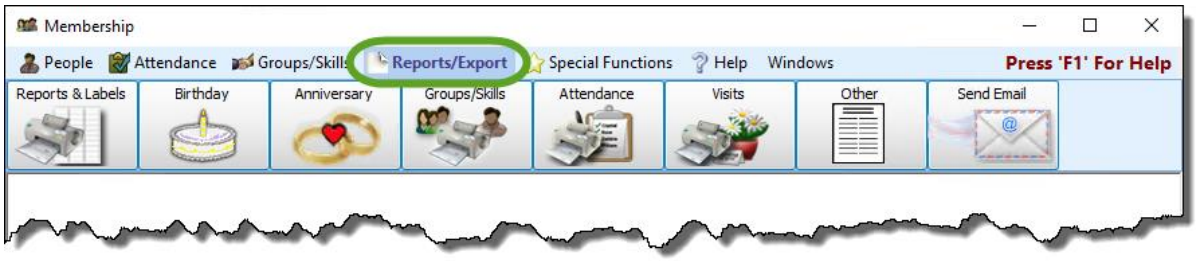
Use the **Labels** feature to generate labels, such as mailing labels and name tags. You can access this function from various places throughout Church Windows.

From the Membership Module:

- Click the **Quick Access Buttons** for **Labels**.

OR

- Click **Reports/Export** in the **Button Bar** at the top of the screen.

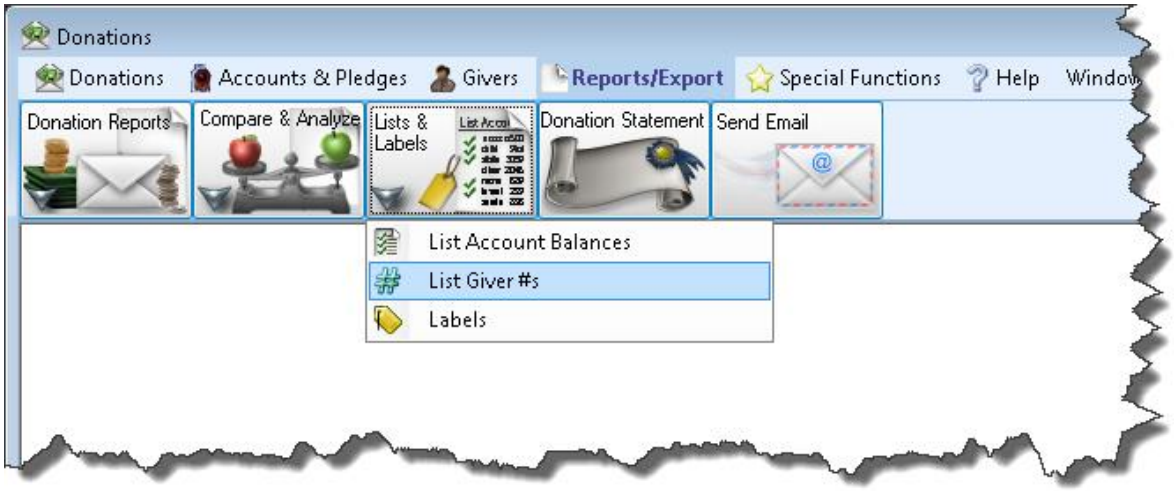


- Then, choose the specific report you would like to run and then select **Labels**.

From the Donations Module:

- Click **Reports/Export** in the **Button Bar** at the top of the screen.

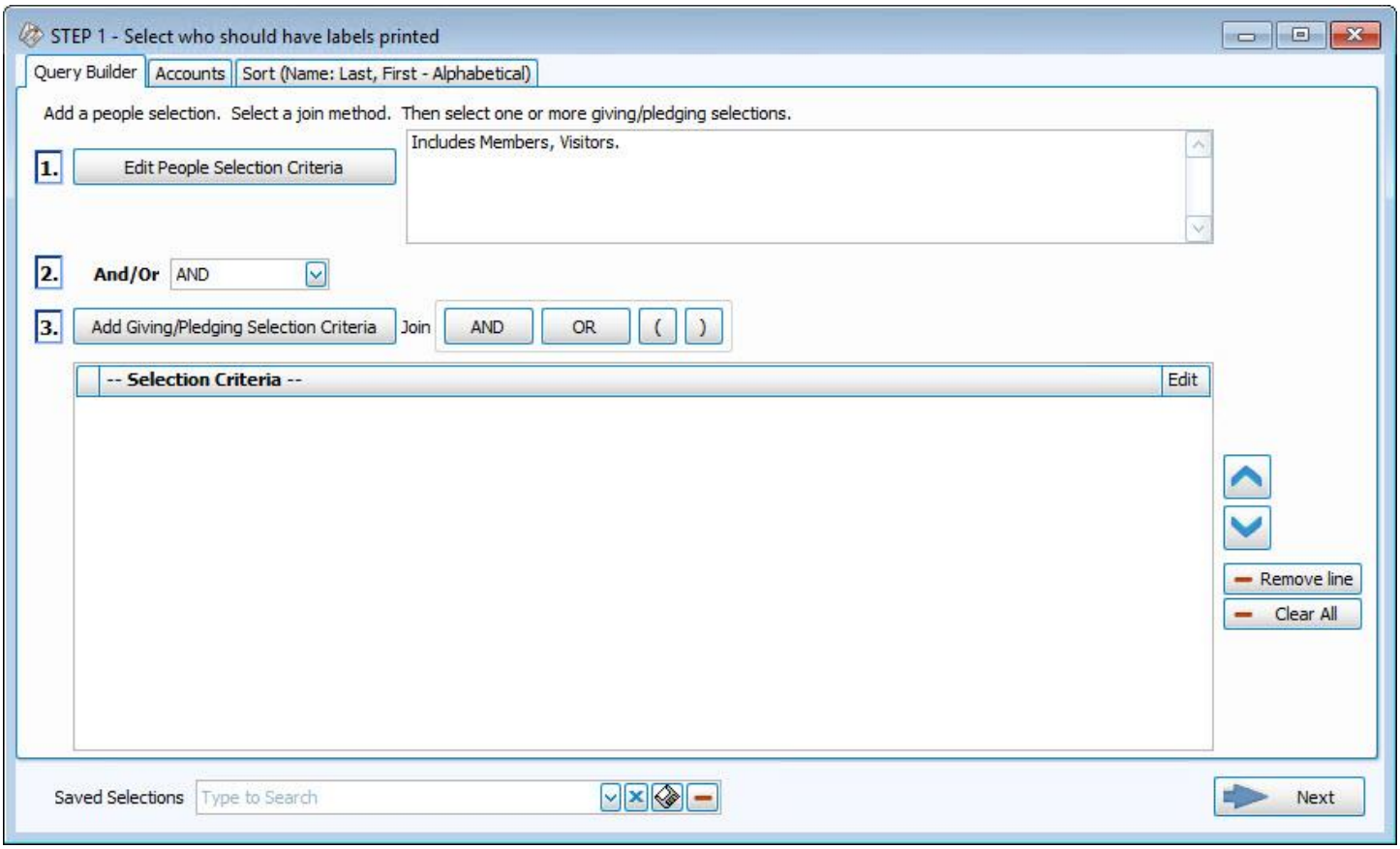
- Then click **Lists & Labels**.



- Then click **Labels**.

Step 1 — Select who should have labels printed

The window will open to the Query Builder tab. This is the first step in creating your labels:



There are 4 available search criteria options for your labels:

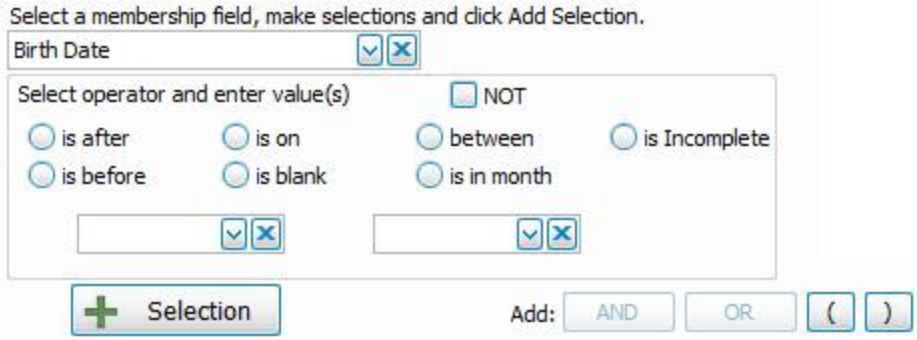
People Selection Criteria

A separate window will open to the People Selection Criteria. This is the first step in creating your labels.

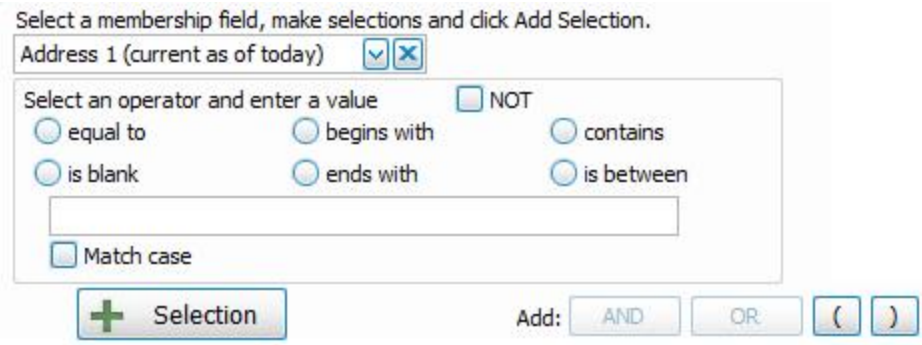
Select a Membership Field

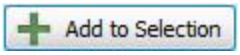
Choose any field in The Individual Record or The Family Record to compile a search query limiting the people who will be included on the report. To include everyone, do not make any selections.

The different Field Types will provide different "operator" choices, such as:

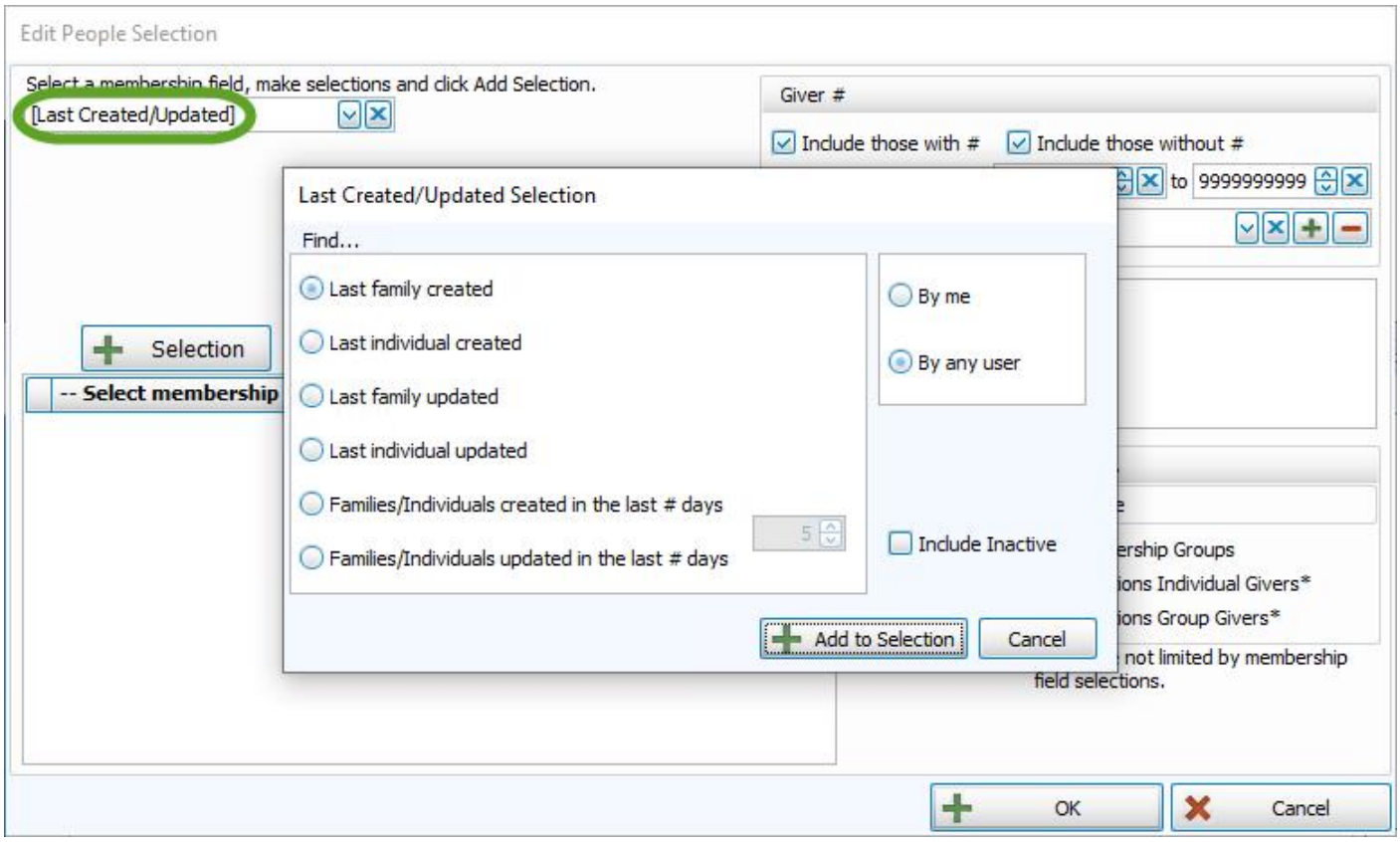


OR



The selections at the top of the list in [brackets] will open a separate window for your to enter your criteria, then press the 

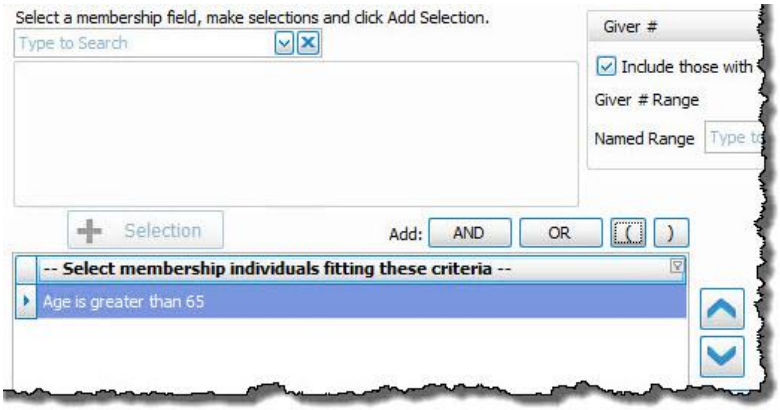
'**Add to Selection**' button to return to the People Selection Criteria screen. These selections include: **[Attendance]**, **[Groups / Classes]**, **[Skills / Interests]**, **[Visits]**, or **[Last Created/Updated]**:



Once you make a **Membership Field Selection**, to add it to the search criteria click on the 

'**Add Selection**' button. It will add it to the **-- Select membership Individuals fitting these criteria --** box below.

For example, if you want to add ages greater than 65 to the criteria, just use the Membership **Field** dropdown to select Age like above, then select the "greater than" operator, and put 65 in the first box. Then click on the Selection button. It will add it and look like this:



Once you have at least one criteria added to your selection, you can either continue selecting other options for the report with just one criteria, or use the Membership **Field** dropdown again to select additional options.

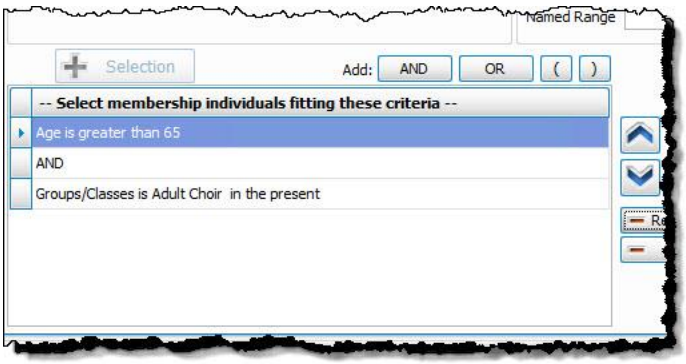
Before you can click on the Selection button to add additional criteria, you must either click the **AND** or the **OR** button to the right of the Selection button to specify how you want the selections applied:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.
- For more complex searches, you can also add parentheses to select people meeting either or both of several different combinations of criteria selections.

Then you will be able to click on the Selection button.

So for this example,

- Select age greater than 65
- Then click the Selection button
- Then select Groups / Classes and choose those presently in the adult choir
- Then click "AND"
- Then click the Selection button again, and it will look like this:



Giver

- If you would like to include all Givers, regardless of whether the Giver has a giving number stored on record, make sure that a ☑ check mark is placed in both **Select Givers with #** and **Select Givers without #** boxes.

  Otherwise, place a check mark in only one of the two boxes. (If needed, see Assign Giver Numbers *(pg 162)*)
- Use the **Giver # Range** boxes to choose the range of Giver numbers for the labels or statements you want to print.
- If you have saved a **Giver # Range** in the past and would like to reuse it, select it from the **Named Range** box.
- You can also add a new **Named Range** by clicking the **Add** button. Or, if you no longer need a **Named Range** that currently exists in the list, select it and click the button.

Categories

If you wish to exclude **Visitors** (or people in other Family Categories you may have added), click the ☑ checkbox to uncheck the Categories you do not want to see on the report.

Include...

- If you wish to include **Inactive** givers in the report, click the box to place a ☑ checkmark. With a checkmark in the box, the report will show both of the following:
  - Givers that have been marked as **Inactive** on the **Manage Givers** *(pg 133)* screen of the **Donations** Module.
  - Givers that have been marked Inactive with an **Inactive Reason** (formerly Reason for Termination) on The Individual Record in the **Membership** Module.
- Place a ☑ checkmark in the boxes if you also wish to include:
  - **Membership** Groups / Classes,
  - **Donations Individual Givers** *(pg 146)**
  - **Donations Group Givers***

  (The asterisk * next to Donations Individual and Group Givers indicates that the Membership criteria selections will not be applied to them and they will be included on the report regardless.)

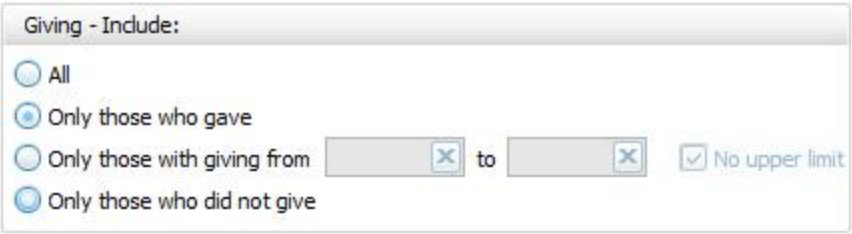
Once you have entered all options necessary for the people you would like to see, you can continue on to the next tab, **Giving / Pledging**.

Giving / Pledging Selection Criteria

The Giving / Pledging Selection Criteria allows you to select options to show those who did or did not give or pledge, or to show certain date ranges for the Givers and/or pledgers. There are also options to select to show the different combinations of types of **Pledges** *(pg 98)*.

Giving — Include

Choose the option that best describes the Giving information you wish to see:



- **All** — Click this option to have all kinds of Givers regardless of their giving included.
- **Only those with giving from** — Enter a desired range of donation dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who gave**
- **Only those who did not give**

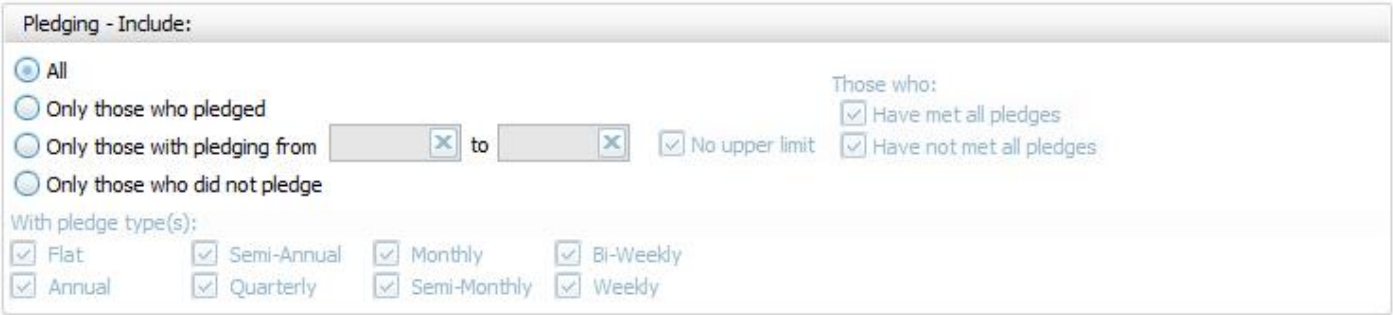
AND / OR

Between the ***Giving — Include*** and ***Pledging — Include*** areas of the screen, use the **AND** / **OR** dropdown box to specify how the criteria must be fulfilled:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.

Pledging — Include

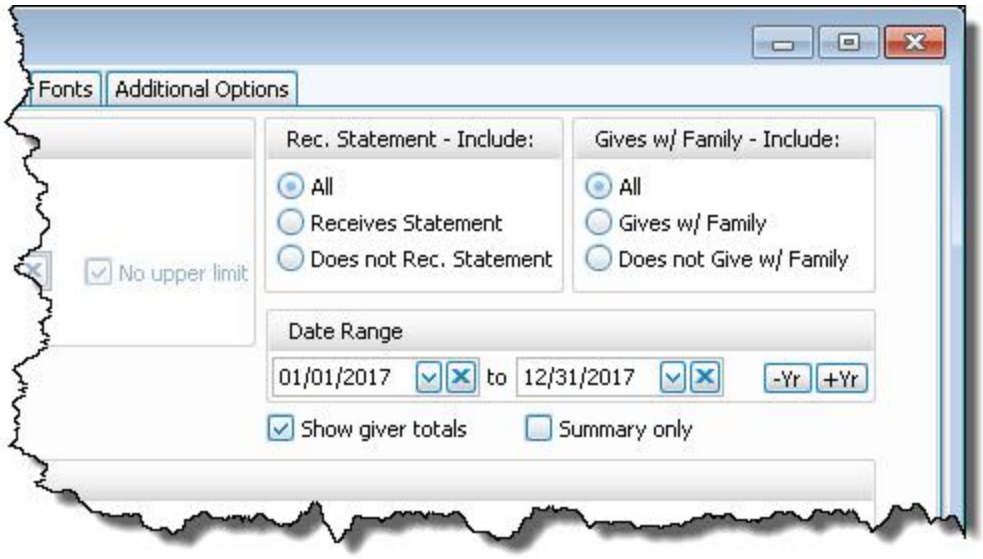
Choose the option that best describes the information regarding **Pledges** *(pg 98)* that you wish to see on your report:



- **All Givers** — Includes all Givers regardless of Pledging.
- **Only those with pledging from** — Enter a desired range of pledge dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who pledged**
- **Only those who did not pledge**
- **Those who:**If applicable, place or remove a ☑ checkmark for **Have Met All Pledges** and/or **Have Not Met All Pledges**.
- **With Pledge Type(s):** Place a ☑ checkmark next to any or all frequencies of pledges you want to include on the report.

Other Options

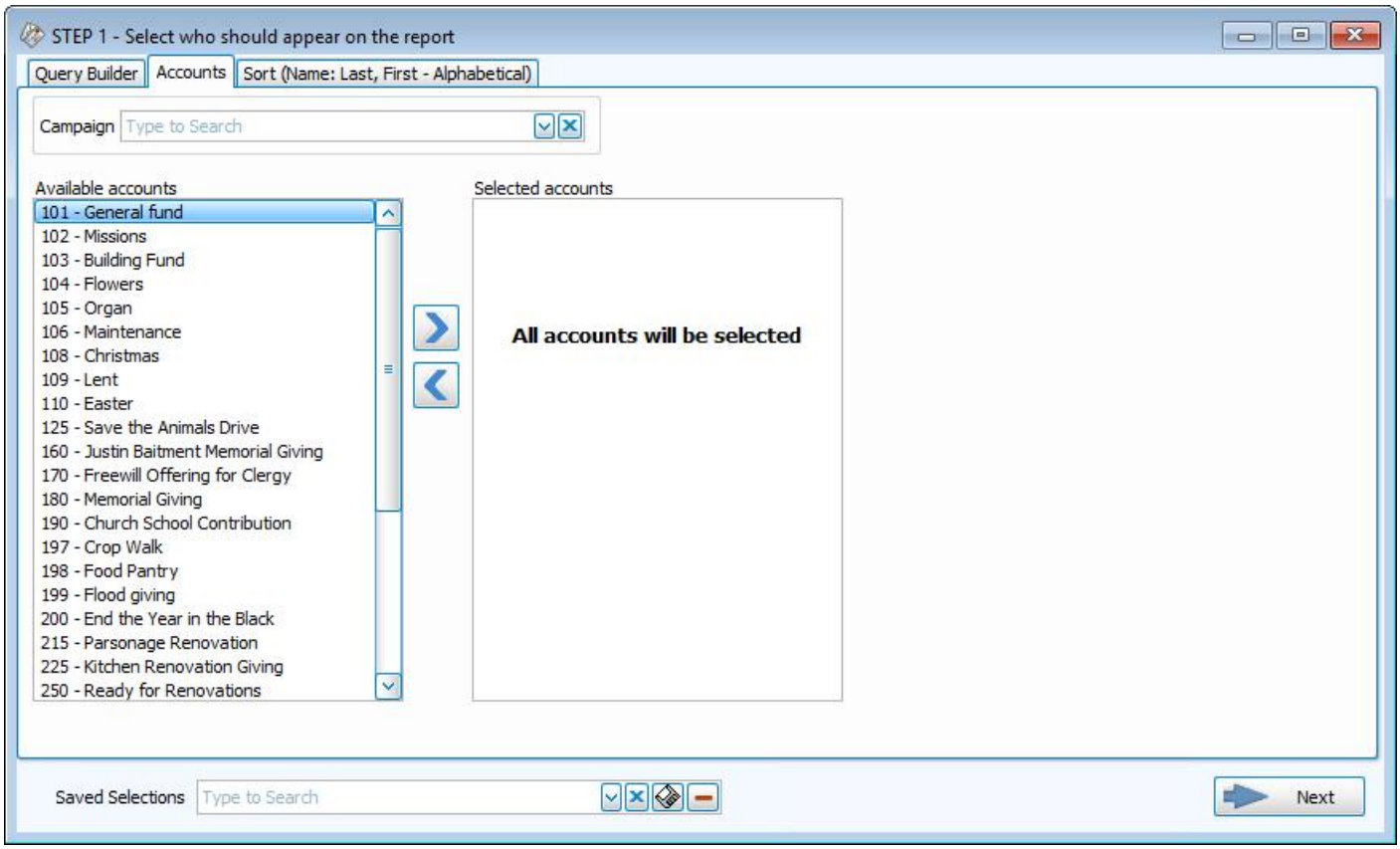
At the top right of the Giving / Pledging tab there are sometimes a few more options, these include:



- **Receives Statement** *(pg 158)* — specify if you only want to see those who do or only those who do not receive statements. (This is not an option on Statements as Givers without "Receives Statement" checked cannot be included)
- **Giving as a Family or Giving Separately** *(pg 158)* — specify if you only want to see those who give alone or only those who give as a family.
- **Date Range** — select the time period that you want the report to present.
- **Show Giver totals** — if you want to see a total for each Giver on the report.
- **Summary only** — if you want to see only the summary, instead of an accompanying, individualized listing by Giver.

Accounts Tab

This tab lets you decide which Donations accounts you do or do not want to show on your report. You can use the **Campaign** dropdown at the top to print only particular **Campaign Pledges** *(pg 100)*. As in other reports in Church Windows, you can use the left and right arrow buttons in the middle, or just double click on the actual accounts to bring them back and forth between the **Available account** side and the **Selected account** side. You could also click on the **Select All** or **Clear All** buttons to move the entire list of accounts back and forth.



Once the account list is correct for what you would like to see, you can continue to the last tab, the **Sort** tab.

Sort Tab

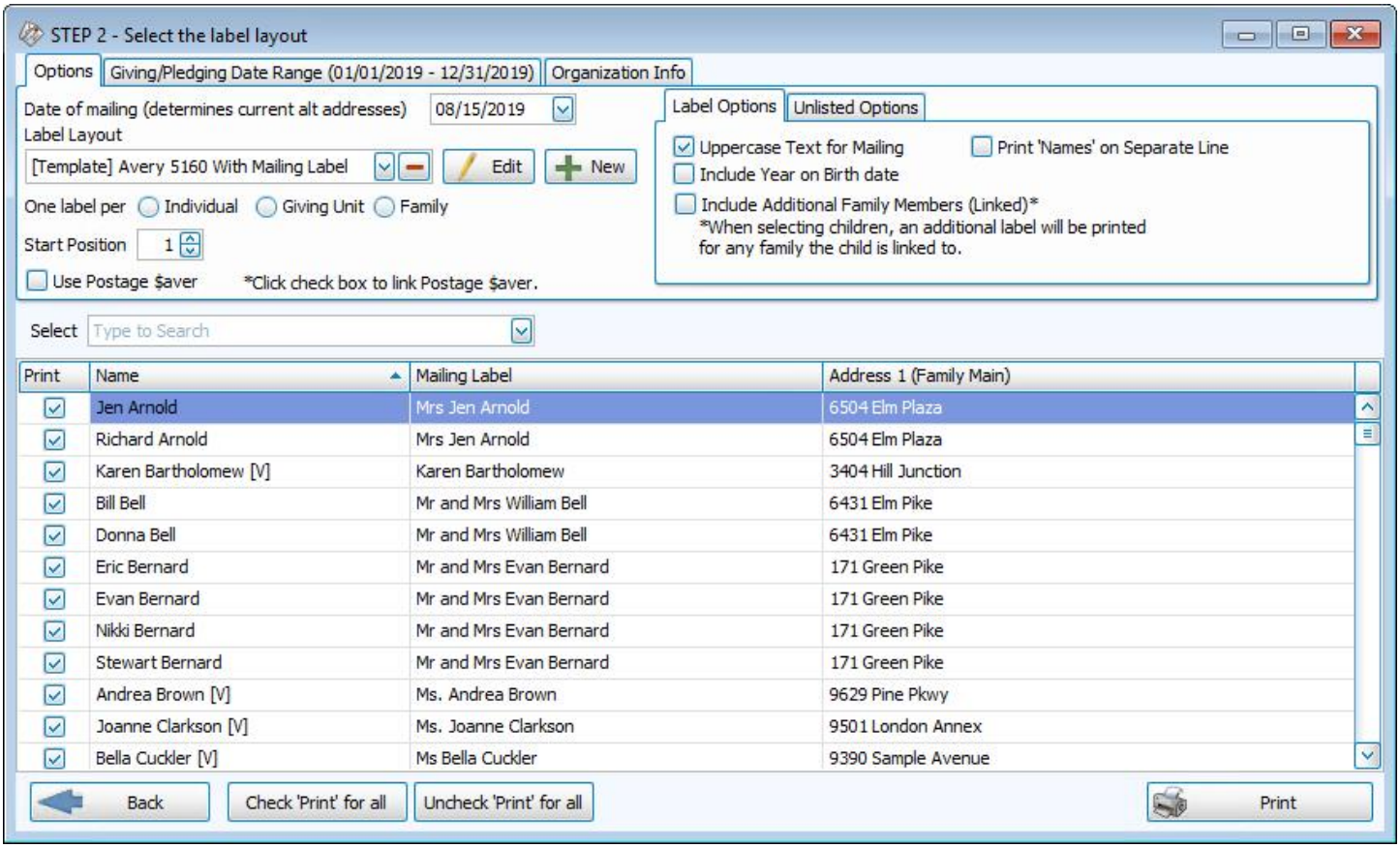
The Sort Tab does not relate to which criteria you have selected. It simply gives you options to sort the labels in a different order when they are printed, regardless of what criteria is selected on the other tabs.

> **Note:**
>
> *Once you have selected the appropriate criteria in any tab(s), you have the ability to save the all selections you have made in all the tabs by clicking on the*  *floppy-disc button to the right of the* ***Saved Selections*** *field at the bottom, at any time, no matter which tab you are in, and name it appropriately. From that point on, you can access that specific search criteria any time you go back into this screen.*

Clicking on the → **Next** button at the bottom will bring you to the **Label Layout** screen:

Step 2 — Select the Label Layout

This is where you can specify how the label will look and what information it will include:



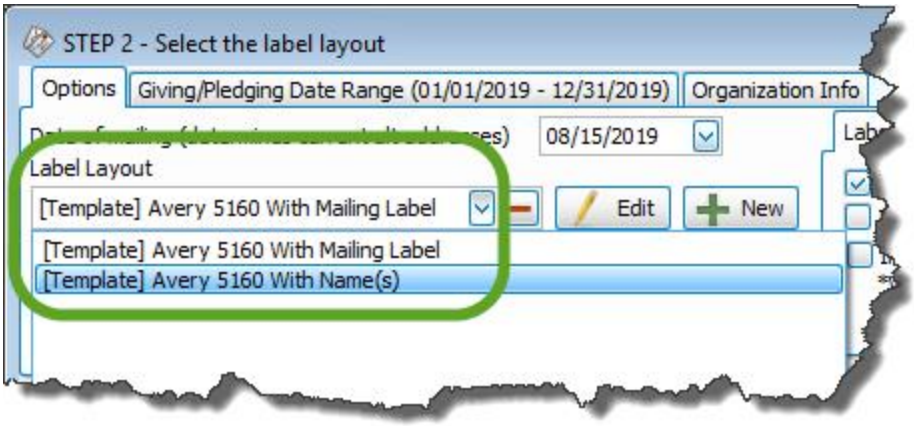
Options tab

Date of Mailing

If you are printing labels to send on another date besides today, enter a date here so that the correct address is used if you have people with **Alternate** Addresses during particular date ranges. For example, if someone is in school for the fall, it will then know to send it there if the mailing date is within that time frame.

Label Layout

Use the dropdown to see the preloaded label formats and choose the specific label type you are using:



The "*[Template] Avery 5160 With Mailing Label*" layout will contain whatever you have entered into the "Mailing Label" field on The Family Record and will look something like this:

MR AND MRS JAKE KNOX
7314 MAIN BLVD
GAHANNA OH 43230-2155

The "*[Template] Avery 5160 With Name(s)*" layout will contain the first and last name of the selected individual(s) and will look something like this:

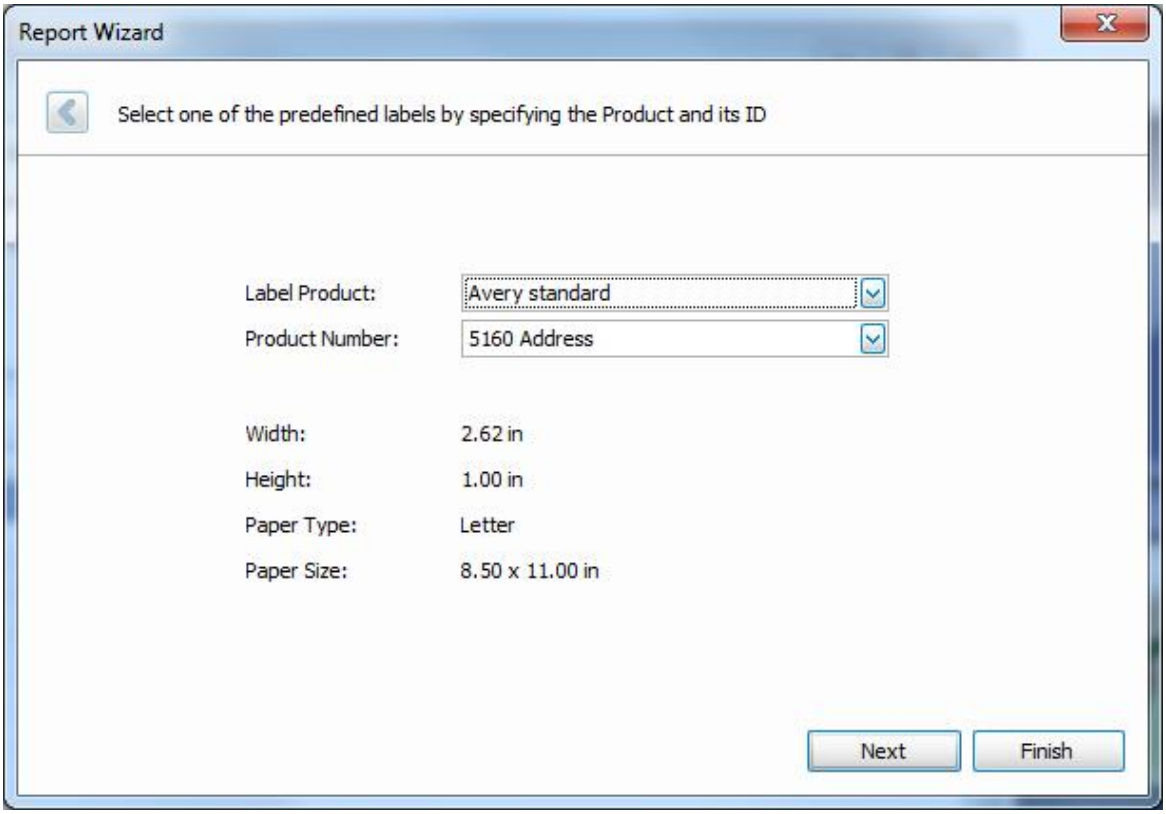
JAKE, SARAH, JUDITH, NATE KNOX
7314 MAIN BLVD
GAHANNA OH 43230-2155

If you need to customize or modify a **Label Layout**, you can click on the Edit Label button to the right. This will open the **Report Designer** that is available from other reports, and here you can customize which fields you want, where you want them, and the sizes/styles of any field and save an alternate copy of the original layout.

If there is not a **Label Layout** that meets your needs such as the label brand or size itself, you can start from scratch by clicking on the New Label button:

New Label

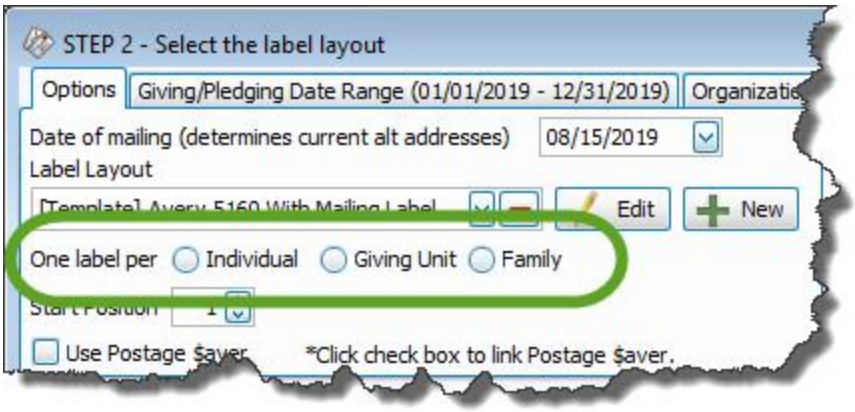
- The Label Wizard is a set of screens that help you define new labels, so that you can select the **Label Layout** name on the Labels screen and continue with the printing of your labels.
- Specify the Label Information by choosing one of the **Label Products** and its **Product Number** from the dropdown lists. Most standardized labels are in this list. The section beneath the drop-down boxes will display the dimensions for the Label you selected:



- Click **Finish**when done, unless you need to make more specific changes to the layout of the label, such as its Width, Height, Pitch, Margin, or Page size in which case you can click **Next** and use the diagram to verify/adjust the label you chose (usually not necessary), then click **Finish**.
- The wizard will pull up the Report Designer screen where you can verify the layout for the label and field for the text that the **Label Layout** is supposed to print. This is also where you can add barcodes if you are Using Postage $aver with Church Windows. When you are finished, click the **Save** button at the top of the screen.
- Close the **Report Designer** screen and use the **Label Layout** dropdown box on the **Step 2** Labels screen to choose the layout you set up on your labels.

One Label per

Click the option to prepare separate labels for each: **Individual**, **Giving Unit** (for people set as **Gives with Family** *(pg 140)*), or **Family**:



Start Position

If needed, enter a number in the box; this would be the number of previously used labels on first page. If you have a full page of blank labels that are available for material to print on them, make sure you have this number set to 0.

> **Note:**
>
> *The last time you printed labels using the same label paper, you might have used up a certain amount of labels. If this is true in your case, your first sheet of labels is not going to have labels available. Instead of wasting a sheet of paper, you can show the software to start at the first unused label, and therefore make use of the rest of the labels on the page.*

Label Options tab

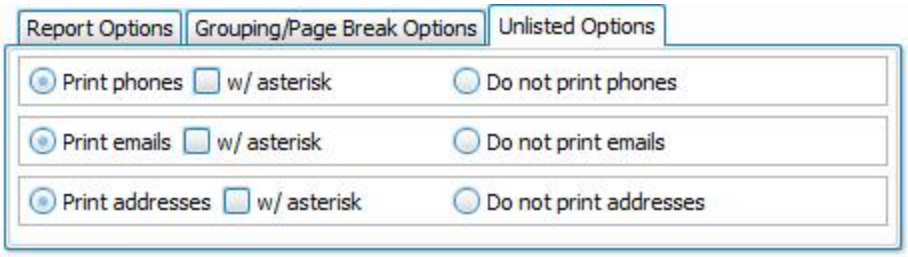
- **Uppercase Text for Mailing**
  If you are printing labels for another purpose besides mailing, you can uncheck the box to print in both upper and lower case instead of the default of only uppercase. Keep in mind, however, that according to the USPS Publication 28 (which is the official guide on postal addressing standards) all uppercase addresses are preferred though it is not a requirement.
- **Include Year on Birth Date**
  If you choose a **Label Layout** *(pg 243)* that has birth dates on it, this box allows you to either include or exclude the year on the label.
- **Include Additional Family Members**
  To include the names of any additional family members you may have added using the Link another child to this family function, place a check in the box to the right of the "*One label per*" selection.

- **Print 'Names' on Separate Line**
  When you use a **Label Layout** *(pg 243)* that includes both the Mailing Label and Individual Names, this option allows you to have the names of the individuals print on a separate row on the label (box unchecked on the left, box checked on the right):

MRS JEN ARNOLD, JEN, RICHARD ARNOLD 6504 ELM PLAZA APT 271 GAHANNA OH 43230-5655	MRS JEN ARNOLD JEN, RICHARD ARNOLD 6504 ELM PLAZA APT 271 GAHANNA OH 43230-5655
MR AND MRS EVAN BERNARD, EVAN, NIKKI, ERIC, STEWART BERNARD 171 GREEN PIKE WESTERVILLE OH 43081	MR AND MRS EVAN BERNARD EVAN, NIKKI, ERIC, STEWART BERNARD 171 GREEN PIKE WESTERVILLE OH 43081

Unlisted Options tab

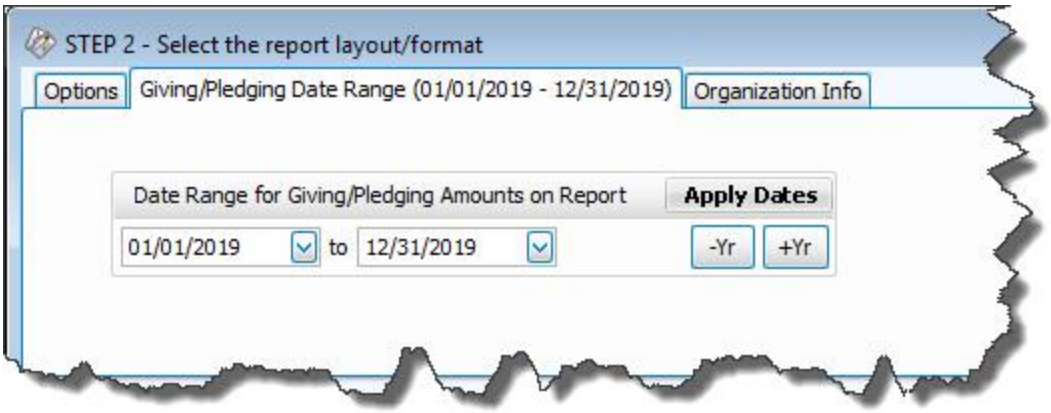
When Phone, Email, or Addresses are marked as **Unlisted** you can use this tab to determine whether or not they will print on reports and, if so, to include and asterisk * if they are **Unlisted**:



On most reports, they are included by default, however on **Directories** the default is **Do not print**.

Giving / Pledging Date Range tab

This tab allows you to select a different date range to print on the report than the selections you made in Step 1 — Select who should appear on the report for the **Giving / Pledging Selection Criteria** *(pg 237)*



Organization Info tab

If the **Label Layout** *(pg 243)* you selected uses a certain name to represent the Organization Info , select the desired options. Unless otherwise specified, your Church name will appear at the top of the report as you initially entered it into the Organization Info stored in System Information in the Administration 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.

Select People

The list at the bottom of the screen shows all the people that met your search criteria. Because all people in the list have a checkmark next to their names, their information will print on the label. If there is a specific person or people for whom you do not want to print a label, click to remove the checkmark that appears next to the desired name(s) or use the **Check All**/**Uncheck All** buttons at the bottom.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

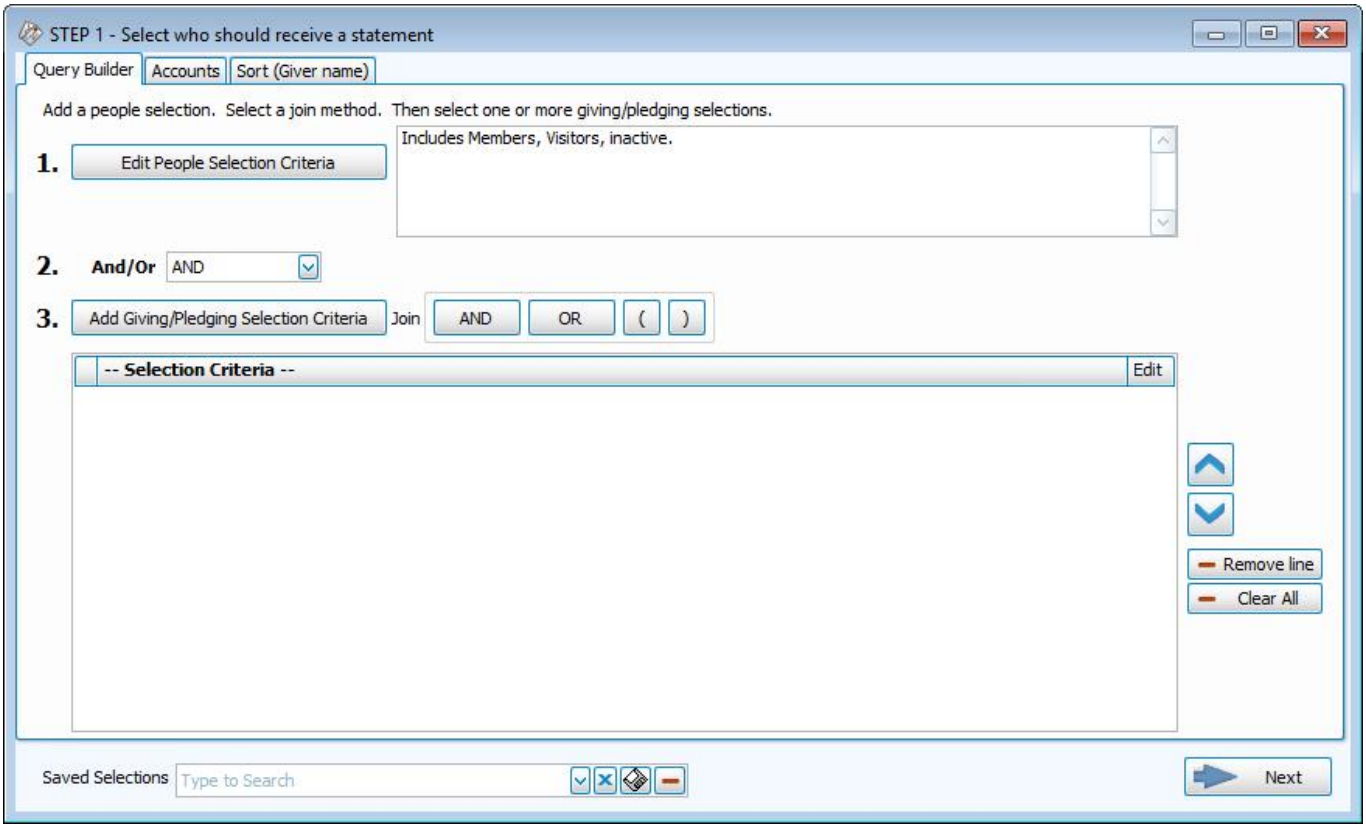
Donation Statements

You can print and/or **Email Donations Statements** *(pg 257)* at any time of the year. When doing so, the giving and pledging information entered in the software is calculated and printed onto a statement for each selected person or group.

> ***For Canada Users only**: Donation Statements in Church Windows will be referred to as Donation Receipts. When **Donation Receipts** (pg 270), be sure to verify the starting **Receipt #**.*

To access the Donation Statements screen:

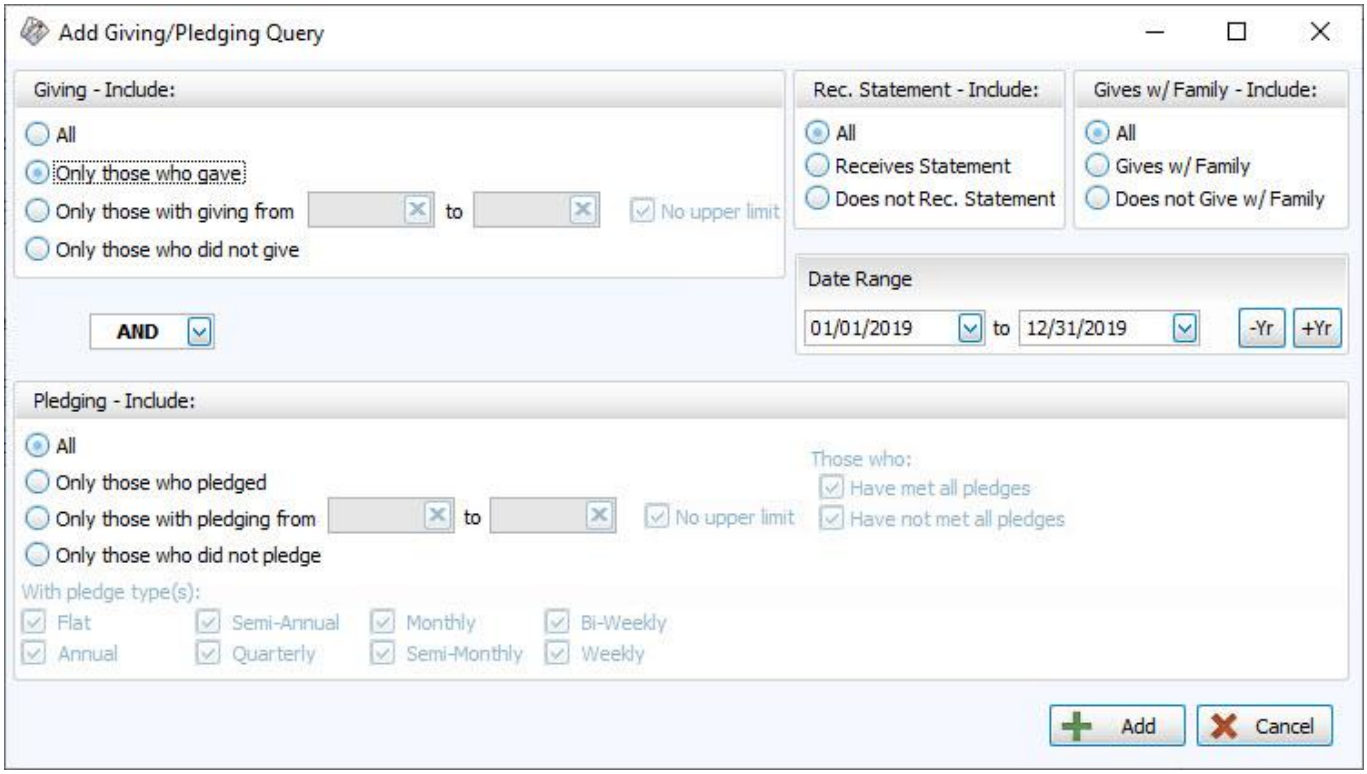
- Click **Reports / Export** in the **Button Bar** at the top of the screen
- Click **Donation Statement**.
- It will open up to the Query Builder tab:



Step 1 — Select who should receive a statement

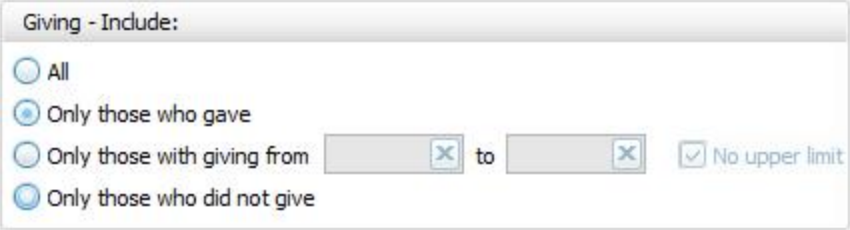
- Click on the **Add Giving / Pledging Selection Criteria** button, here you can change the **Date Range** and make any selections you want to narrow down the list of Givers receiving a statement by the giving and pledging conditions that this tab provides. If you want statements only for those who gave, you don't need to change the

default selection:



Giving — Include

Choose the option that best describes the Giving information you wish to see:



- **All** — Click this option to have all kinds of Givers regardless of their giving included.
- **Only those with giving from** — Enter a desired range of donation dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who gave**
- **Only those who did not give**

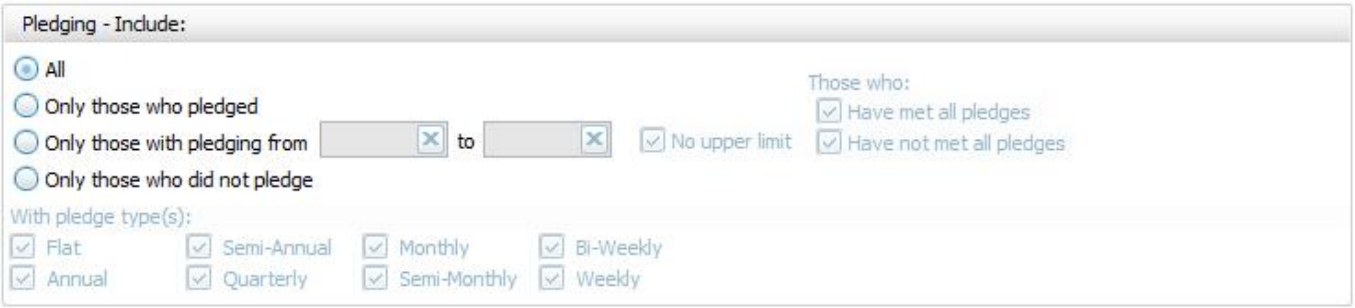
AND / OR

Between the ***Giving — Include*** and ***Pledging — Include*** areas of the screen, use the **AND** / **OR** dropdown box to specify how the criteria must be fulfilled:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.

Pledging — Include

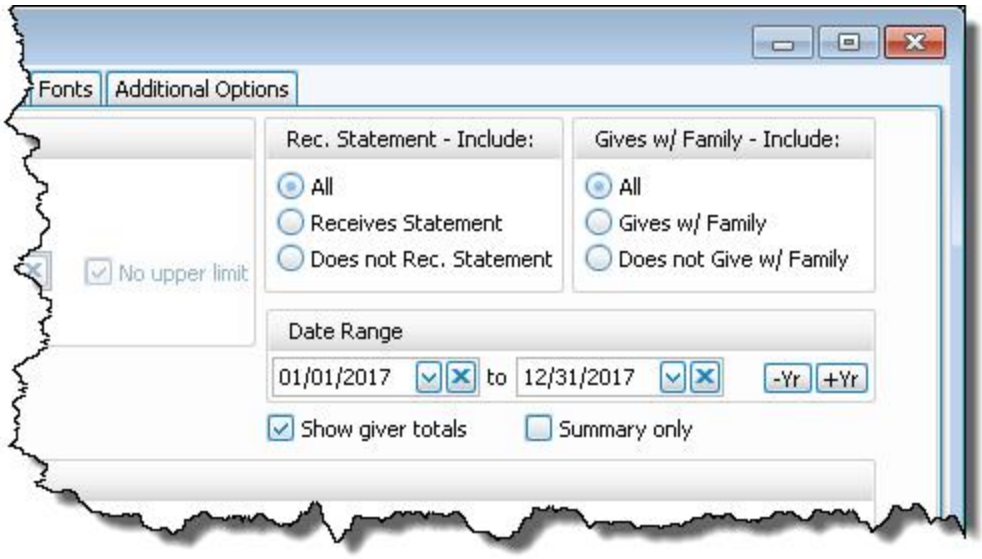
Choose the option that best describes the information regarding **Pledges** *(pg 98)* that you wish to see on your report:



- **All Givers** — Includes all Givers regardless of Pledging.
- **Only those with pledging from** — Enter a desired range of pledge dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who pledged**
- **Only those who did not pledge**
- **Those who:**If applicable, place or remove a ☑ checkmark for **Have Met All Pledges** and/or **Have Not Met All Pledges**.
- **With Pledge Type(s):** Place a ☑ checkmark next to any or all frequencies of pledges you want to include on the report.

Other Options

At the top right of the Giving / Pledging tab there are sometimes a few more options, these include:



- **Receives Statement** *(pg 158)* — specify if you only want to see those who do or only those who do not receive statements. (This is not an option on Statements as Givers without "Receives Statement" checked cannot be included)
- **Giving as a Family or Giving Separately** *(pg 158)* — specify if you only want to see those who give alone or only those who give as a family.
- **Date Range** — select the time period that you want the report to present.
- **Show Giver totals** — if you want to see a total for each Giver on the report.
- **Summary only** — if you want to see only the summary, instead of an accompanying, individualized listing by Giver.

- Choose any of the following tabs to apply additional settings:

People Selection Criteria / Givers Tab

To specify certain Membership characteristics of the people you want to include. The characteristics for you to choose are actual fields that store people's information in The People File. This tab is the exact same as the **People Selection Criteria** in **Membership** Reports / Directory / Exports.

Accounts tab

Specifies that only certain accounts should be included.

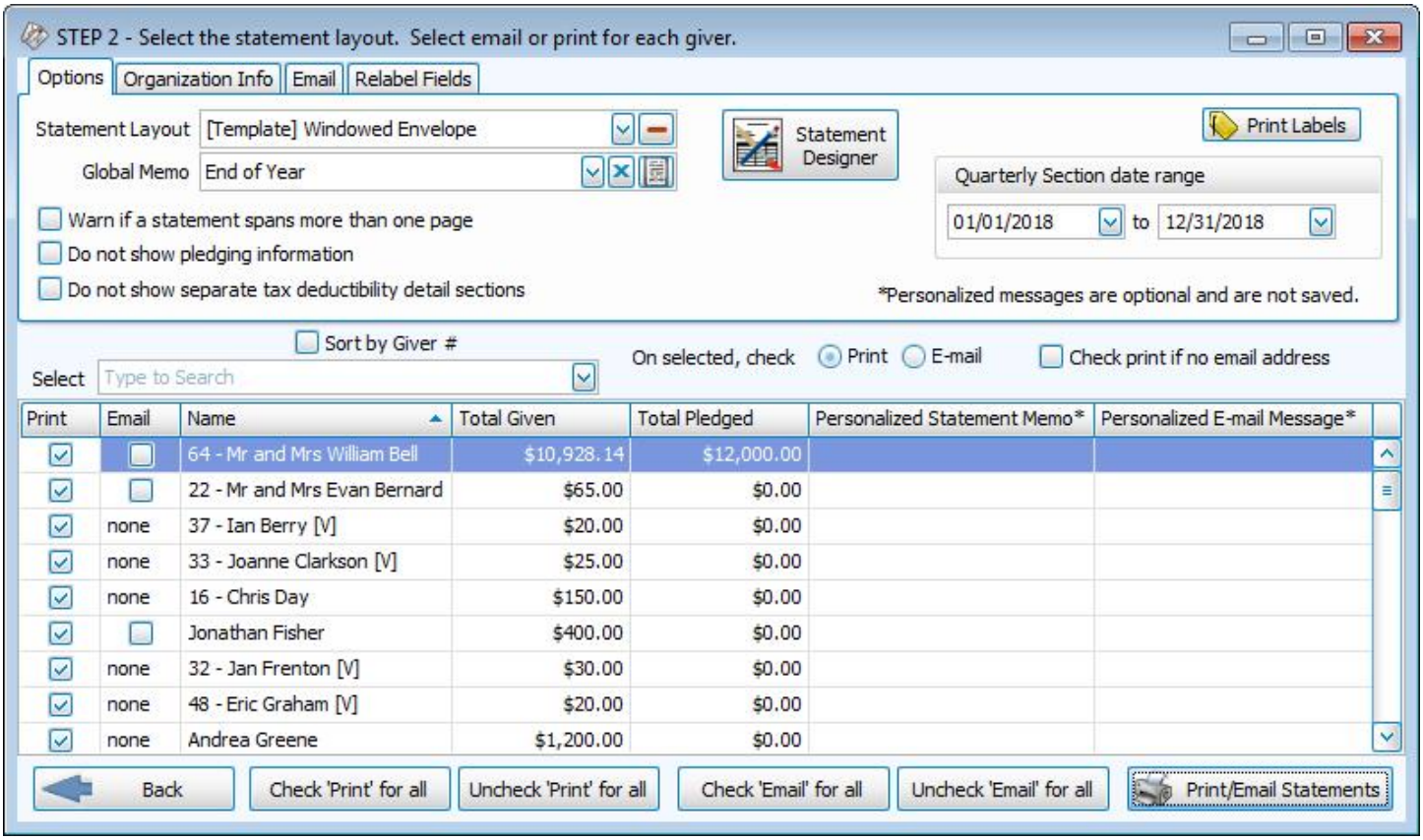
Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

- When you're finished, click the → **Next** button.

Step 2 — Select the statement layout / format

Make selections on each of the tabs to customize your statements, as needed.



Options

- **Statement Layout and Statement Designer**
  Choose the desired **Statement Layout** from the dropdown or click the **Donation Statement Designer** *(pg 258)* button to modify an existing layout or to create your own.

- **Global Memo**
  Enter a new message or select a previously entered one from the dropdown if you would like to include a message to all of your Givers on their Statements. (Alternatively, you can use the **Personalized Statement Memo*** to include a personal message for one specific Giver.)

- **Warn if a statement spans more than one page**
  Place a check in this box to turn on the notification for statements that exceed a single page or remove the check-mark to avoid being notified.

- **Do not showing pledging information**
  If your Church does not use the pledging portion of **Donations**, you can remove all pledging information from statements by checking this box. Leave the box unchecked to include pledging information on statements.

- **Do not show separate tax deductibility detain sections**
  In the detail section of your statements, you can check this box to prevent it from separating donations based on the tax deductible status of the account.

- **Print Labels**
  Once you have selected the names of the Givers to whom you want to send a statement, you can send a label to the same selected Givers by clicking the button at the top right. This way, you can print **Labels** *(pg 229)* for the same Givers receiving a statement.

- **Quarterly Section date range**
  If you are using a statement layout which will include the Quarterly section, verify that the date rage of the desired Quarter is showing in this box. If you are unsure if your statement layout includes this section, check the **Donation Statement Designer** *(pg 258)*.

> **Note:**
>
> *If a Giver who should receive a statement is missing from the list of selected Givers in the bottom half of the screen, you must place a checkmark in this box on the selected Giver's record in **Manage Givers** (pg 133) to include them. If there is no checkmark in the **Receives Statement** box for a Giver, the software **cannot** print a statement for that Giver.*

- **On selected, check**
  Here you can choose either **Print** or **Email**

- **Check Print if no email address**
  Have a statement printed out for email addresses that are not on file by placing a ☑ checkmark the box. This way if you choose, Email and the statement recipient does not have an email on record, the software will know to print out a statement.
- Select the Givers for the statements you need by placing a checkmark next to the desired names under the **Print** or **Email** column.
- For either column, you can also click **Uncheck 'Print' (or 'Email') for all** to remove all check marks, manually select certain ones, or click **Check 'Print' (or 'Email') for all** to reselect all names in the list.
- Click **Print / Email Statements** to proceed to a Print Preview. If you have chosen to email statements, an email will be sent with an attachment of the statement in PDF file format (see below).

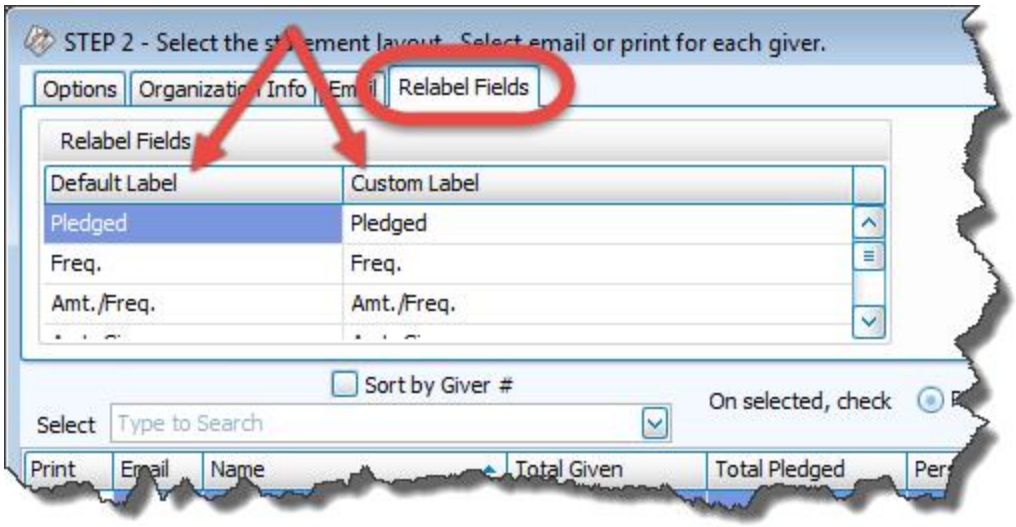
Organization Info tab

Unless otherwise specified, your Church name will appear at the top of the report as you initially entered it into the Organization Info stored in System Information in the Administration 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.

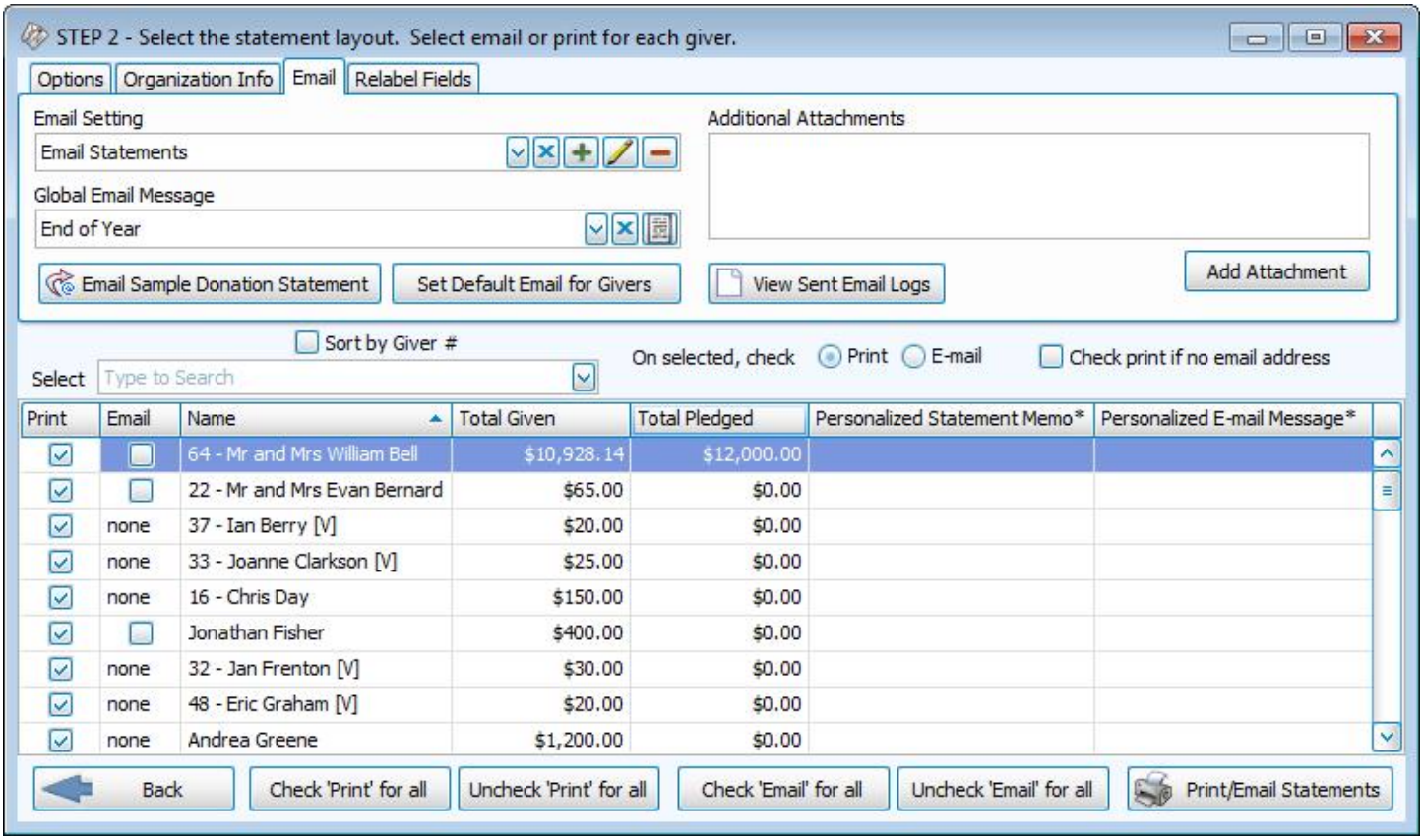
Relabel Fields tab

- When someone makes a commitment to give a certain amount of money, the software regards the money as being pledged. Some Churches use a different word instead of “pledged”. This and other labels that appear on the statement can be changed to any words you wish your statement to show, by placing a **Custom Label** next to the **Default Label**:



Email tab

Use the **Email** tab to make your selections for emailing statements, first you must **Setup Email** *(pg 276)*.



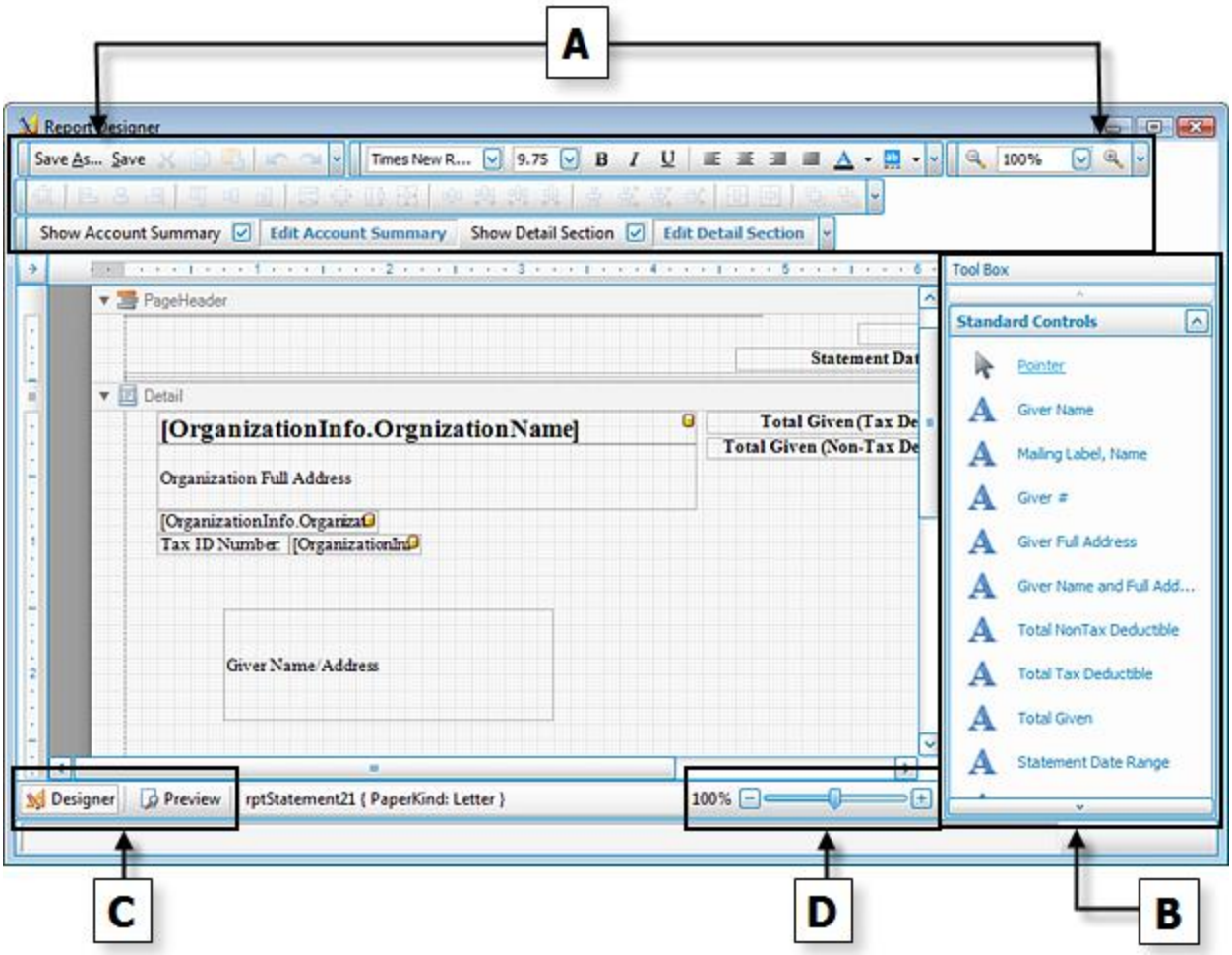
Email Donations Statements

When you email Donation Statements, a PDF version of the same statements that you would otherwise be printing will be attached to the email. You can add other attachments and customize the email itself using the options on this tab:

- **Email Setting**
  The names found in the dropdown box represents SMTP Email settings that have been already saved under a specific name, called the *Display Name*. The *Display Name* you choose from this list will then send your statements by email according to the settings saved to it.
  - To **Setup Email** *(pg 276)*, click the **Add** button.
  - To change the email settings of any existing settings in the list, click the name once. Then, click the **Edit** button.
  - To remove a setting, select it from the list and click the **Delete** button.
- **Global Email Message**
  Create or select a previously used memo if you would like to include a message to your Givers on their Statements. You may also add attachments to the email, as needed.
- **Email Sample Donation Statement**
  When finished, you can click this button to send a test email to verify that the *Display Name* under the Email Settings has been correctly configured.
- **Set Default Email for Givers**
  If you wish to change the Mass Assign Email Field (from MembershipModule) selection on the **Donations Settings** *(pg 297)* screen.
- **View Sent Email Logs**
  If you need to view records of your previous emails, click this button and choose the date of the mailing you wish to view.
- **Additional Attachments / Add Attachment**
  This box will list any attachments you have chosen to include with your statements by clicking the Add Attachment button and browsing to select your desired file.

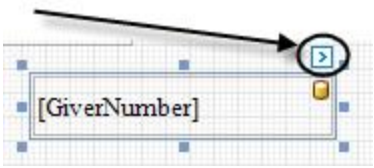
Donation Statement Designer

Use the Statement Designer to design a custom layout for your **Donation Statements** *(pg 248)*. The Statement Designer allows you to make your own unique changes to the default statement templates included with the software or even create totally custom statements from scratch. This tool lets you change the intricate details of each field on your report: size, position, separators, headers and footers, etc. This is a very involved tool and usually only used by those very familiar with customization and designing that have specific requirements. The standard statement layouts included in the software are usually sufficient, so before using this tool, make sure there is not already a layout that meets your needs.



The primary objective of the **Statement Designer** is to take a desired item from the **B — Standard Controls Tool Box** *(pg 266)* and place it on the form. To do this, first click the desired item name. Then, trace the area of the form where you would like to place the selected item. The form will then show the item you selected. You can then click-and-drag it to the place you want it to be. You can also click the arrow in the upper right corner of the item to make additional

selections specific to the item.



> **Note:**
>
> *To move objects very precisely, you can hold down the **CTRL** key and use the arrow keys on your keyboard (←, ↑, →, **or** ↓) to move the object(s) very minutely. You can also hold the **SHIFT** key along with **CTRL** and the use arrow keys to either stretch or shrink the size of the object(s).*

A — Formatting and Layout Toolbars

The toolbars at the top of the screen allow you to save the layout under a specific name and adjust the font size, font style, text alignment, as well as zooming further in and further out. Below is a complete list of the items from left to right, starting with the top toolbar and ending with the bottom toolbar. Both toolbars are separated into their own groups.

Top Toolbar

Gives you the option to save the layout under a different name, especially if you have created a layout already and do not want it to be saved under the name that represents the already created layout.

Updates the layout on which you are currently working.

After you have selected any object or text, click this button to make a copy of the item to the clipboard while removing the item from the layout.

After you have selected any object or text, click this button to make a copy of the item to the clipboard. When you click the button it will appear as if nothing has happened. This is because the function of copy-

ing the item to the clipboard is not visible to the eye when inside this layout.

> **Note:**
>
> *To be reassured that the item was copied to the clipboard successfully, you will have to use the **Paste** button.*

Click this **Paste** button to place any item or text in the form that has been copied to the clipboard via the **Cut** or **Copy** button.

Click this button to undo the last operation performed.

Click this button to redo the last operation. For example, if you pressed the **Undo** button and changed your mind immediately afterwards, you can press the **Redo** button to cancel that operation.

When you are selecting any item that has editable text for which you can choose different fonts, click the dropdown button and make a choice from this box. Fonts that you can use to change the style in which the text appears for your item selected can be chosen from this box.

When you are selecting any item that has editable text for which you can choose a different font size, click the dropdown button and make a choice from this box. Font sizes that you can use to change the size in which the text appears for your item selected can be chosen from this box.

Click this button to show in **bold** typeface any item that presents editable text.

Click this button to show in *italicized* typeface any item that presents editable text.

Click this button to show in underlined typeface any item that presents editable text.

Click this button to align editable text of any object to the left margin.

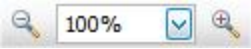
Click this button to align editable text of any object to the center margin.

Click this button to align editable text of any object to the right margin.

Click this button to align editable text so that it reaches both left and right margins with the spacing needed on each line to do so. In other words, if you would like to have text be equally aligned towards the left as you would like to have it aligned towards the right margin, press this button.

Click this button to set the foreground color of the selected item.

Click this button to set the background color of the selected item.



This feature allows you to zoom further in and further out from the normal appearance of the layout. For instance, zooming in consists of making the objects bigger so that you can get a closer look at individual objects or text on the form without making size changes to any items. In the same respect, zooming out makes the items smaller in the same respect. Either use the dropdown box to choose a percentage, or click the (—) or (+) buttons on either side to zoom further out or further in.

Bottom Toolbars

After having clicked on a control from the **B — Standard Controls Tool Box** *(pg 266)* and having placed the control on the form, you can use any of the following buttons to apply formatting to the control. Eight of the twenty-five controls on this list can be used with at least one control. These controls have been marked in the list below with an (*) asterisk.

To use any of the rest of the seventeen controls on the bottom toolbar, you must first select at least two controls that have been already added to the form.

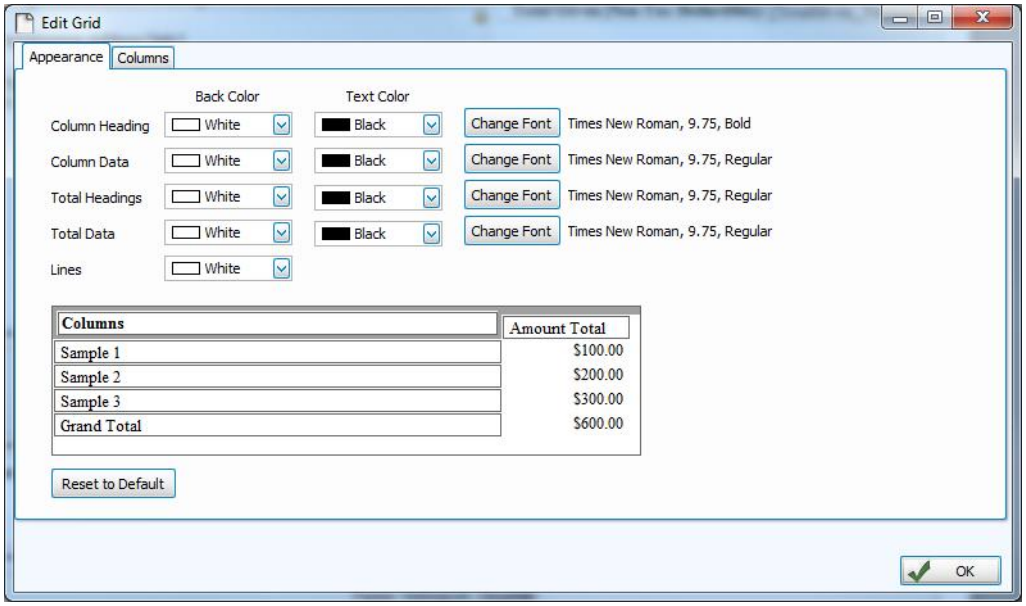
To Grid (*)	Align the positions of the selected controls to the grid.
Lefts	Left align the selected controls.
Centers	Align the centers of the selected controls vertically.
Rights	Right align the selected controls.
Tops	Align the tops of the selected controls.
Middles	Align the centers of the selected controls horizontally.
Bottoms	Align the bottoms of the selected controls.
Width	Make the selected controls have the same width.
Size to Grid (*)	Size the selected controls to the grid.
Height	Make the selected controls have the same height.
Both	Make the selected controls the same size.
Make Equal	Make the spacing between the selected controls equal.
Increase	Increase the spacing between the selected controls.
Decrease	Decrease the spacing between the selected controls.

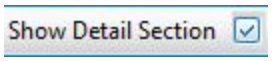
Remove	Remove the spacing between the selected controls.
Make Equal	Make the spacing between the selected controls equal.
Increase	Increase the spacing between the selected controls.
Decrease	Decrease the spacing between the selected controls.
Remove	Remove the spacing between the selected controls.
Horizontally (*)	Horizontally center the selected controls within a band.
Vertically (*)	Vertically center the selected controls within a band.
Bring To Front (*)	Bring the selected controls to the front.
Send To Back (*)	Move the selected controls to the back.

Show Account Summary Place a ☑ checkmark in this box to show the account summary area of the statement.

Account (Pledged Dates)	Freq.	Amt./Freq.	Pledged	Prior Giving	An
Giving Account 1 (01/01/2017-12/31/2017)	M	100.00	1,200.00	0.00	
Giving Account 2 (01/01/2017-12/31/2017)	A	1,000.00	1,000.00	500.00	
Giving Account 3 (Non-Pledge)		0.00	0.00	0.00	
Giving Account 4 (Non-Pledge)		0.00	0.00	0.00	
Giving Account 5 (01/01/2017-06/30/2017)	F	600.00	600.00	0.00	
Giving Account 5 (07/01/2017-12/31/2017)	F	600.00	600.00	0.00	
		Grand Total	3,400.00	500.00	

Edit Account Summary Click this button to change the Account Summary on the appearance and/or **Columns Tab** *(pg 293)*.

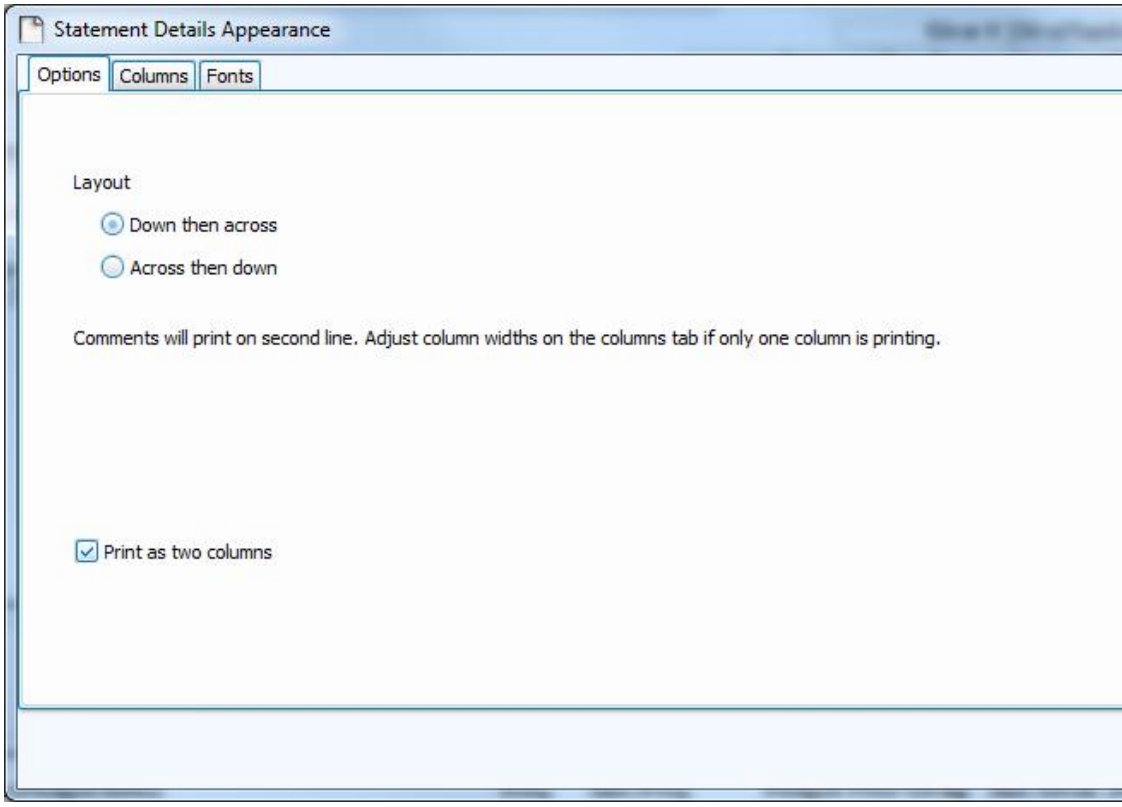




Place a ☑ checkmark in this box to show the detail section of the statement.

Date	Account Name	Amount	Check #	Date	Account Name	Amount	Check #
Non-Tax Deductible							
2/15/17	Giving Account 4	$60.00					
Tax Deductible							
1/1/17	Giving Account 1	$100.00	18001	9/1/17	Giving Account 1	$100.00	18009
Comments for donation1				*Comments for donation9*			
2/1/17	Giving Account 1	$100.00	18002	10/1/17	Giving Account 1	$100.00	180010
Comments for donation2				*Comments for donation10*			
3/1/17	Giving Account 1	$100.00	18003	11/1/17	Giving Account 1	$100.00	180011
Comments for donation3				*Comments for donation11*			
4/1/17	Giving Account 1	$100.00	18004	6/1/17	Giving Account 3	$2,500,000.00	18022
Comments for donation4				*Comments for big donation*			
5/1/17	Giving Account 1	$100.00	18005	1/8/17	Giving Account 2	$25.00	12415
Comments for donation5							
6/1/17	Giving Account 1	$100.00	18006	1/30/17	Giving Account 2	$75.00	12416
Comments for donation6							
7/1/17	Giving Account 1	$100.00	18007	2/1/17	Giving Account 2	$50.00	12417
Comments for donation7							
8/1/17	Giving Account 1	$100.00	18008	2/15/17	Giving Account 2	$50.00	12418
Comments for donation8							

Click this button to make changes to what shows up in the detail section of the statement using the Options tab, **Columns Tab** *(pg 293)*, and/or **Fonts Tab** *(pg 295)*.



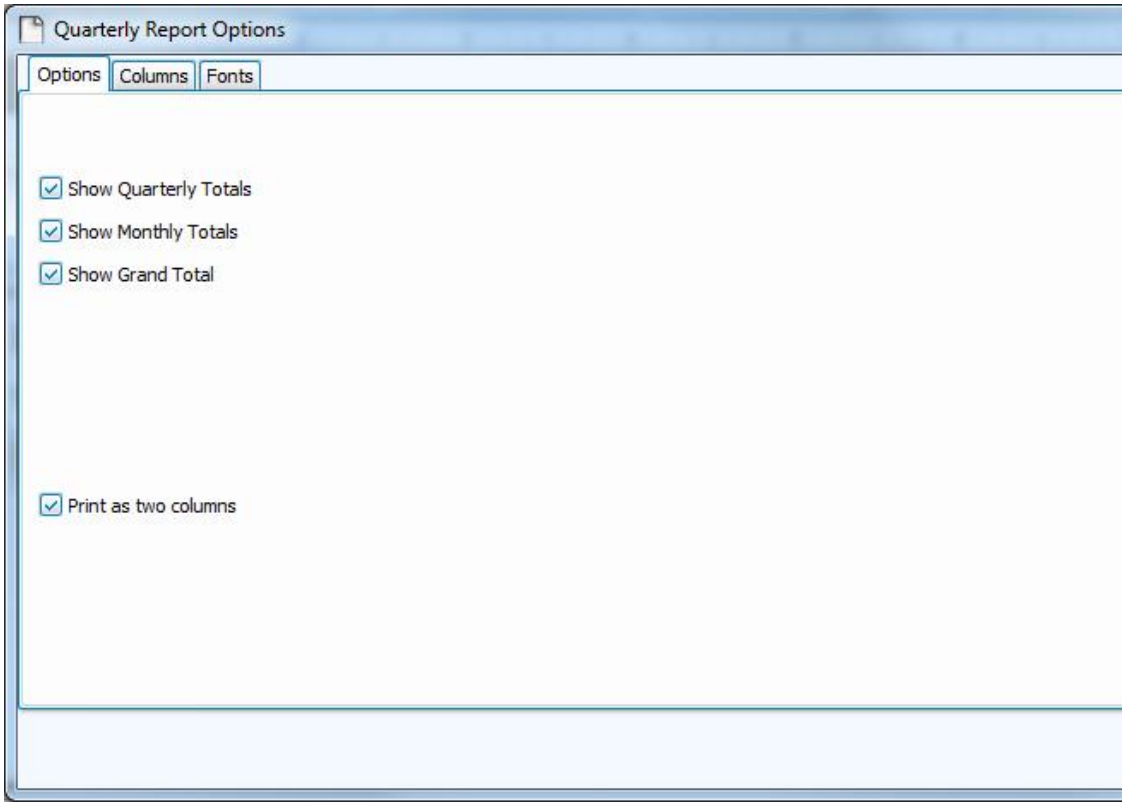
Show Quarterly Section ☑

Place a ☑ checkmark in this box to show the quarterly section of the statement.

	Pledged	Non-Pledged	Total		Pledged	Non-Pledg
2017 - Jan	11.00	5.00	16.00	2017 - Jul	11.00	5
Feb	22.00	0.00	22.00	Aug	22.00	0
Mar	0.00	5.00	5.00	Sep	0.00	5
Q1	$33.00	$10.00	$43.00	**Q3**	$33.00	$10
Apr	11.00	0.00	11.00	Oct	11.00	0
May	22.00	5.00	27.00	Nov	22.00	5
Jun	0.00	0.00	0.00	Dec	0.00	0
Q2	$33.00	$5.00	$38.00	**Q4**	$33.00	$5
				Total	**$132.00**	**$30**

Edit Quarterly Section

Click this button to make changes to what shows up in the quarterly section of the statement using the Options tab, Columns Tab *(pg 293)*, and Fonts Tab *(pg 295)*. You will also want to verify that the Quarterly Section date rangeIf you are using a statement layout which will include the Quarterly section, verify that the date rage of the desired Quarter is showing in this box. If you are unsure if your statement layout includes this section, check the Donation Statement Designer (pg 258). *(pg 254)* is correct.



B — Standard Controls Tool Box

> ***Note:***
>
> *When you first enter the screen, the pointer object in the* ***Standard Controls*** *will appear as* Pointer *underlined. This is an example of what indicates the object as active and ready for you to use. And when you click a different item, that new item will then contain the line underneath it.*

The following is a list of all of the fields you can add to your form:

Clicking this lets you move the existing items on the form. Unless you manually select another Standard Controls item, this item will be already selected for you to move things around.

The Giver Name as shown in the Givers section of the **Donations** Module.

Mailing Label, Name	The Mailing Label of the Giver followed by a comma and the Name, as shown in the Givers section of the **Donations** Module.
Giver #	The Giver Number as shown in the Givers section of the **Donations** Module.
Giver Full Address	A combination of the address location, including the city, state (or province), and zip code (postal code), as shown in the Givers section of the **Donations** Module.
Giver Name and Full Address	A combination of the Giver Name, and the address location, including the city, state (or province), and zip code (postal code), as shown in the Givers section of the **Donations** Module.
Total NonTax Deductible	The calculated total amount set to appear on the statement as non-tax deductible.
Total Tax Deductible	The calculated total amount set to appear on the statement as tax deductible.
Total Given	The total amount of money given.
Statement Date Range	The date range selected prior to entering the Statement Designer screen, and essentially, the date range of the statements being run.
Statement Print Date	The date on which the statement is printed.
Required Tax Agency Statement	The Tax Agency Statement required on all official statements by your national government (only applies to U.S.A. and Canada).
Global Memo	Shows the text you place in the Global Statement Memo field of the Donation Statement screen.
Statement Memo	Shows the text you place in the Personalized Statement Memo field of the Donation Statement screen.
Organization Name	The Organization Name stored in the Org. Info currently selected on the Donation Statement screen.

Organization Name/Address	The Organization Name stored in the Org. Info currently selected on the Donation Statement screen, combined with Address 1, and Address 2 fields.
Organization Full Address	The Address fields, City, State, and Zip Code of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Address 1	The Address 1 field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Address 2	The Address 2 field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization City	The City field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization State	The State field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Zip	The Zip field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization TaxID	The TaxID field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Phone 1	The Phone 1 field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Phone 2	The Phone 2 field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Fax	The Fax field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Email	The Email field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.
Organization Web Address	The Web Address field of the Organization Name stored in the Org. Info selected on the Donation Statement screen.

Receipt #	**Canada Users Only**: The Next Receipt # set to print on the statement, according to the Donation Receipt Info. stored on the Options tab of the Donations Statement screen.
Canada Tax Agency	**Canada Users Only**: The Canadian Tax Agency name stored on the Options tab of the Donation Statement Screen.
Canada Tax Website	**Canada Users Only**: The Canada Tax Website stored on the Options tab of the Donation Statement Screen.
Authorized Signature Line	**Canada Users Only**:The signature line required for the official donation receipt to be validated when signed.
Logo or Image	Use this to select a picture file stored on your computer to show up in the place where you set this item on the form.
Label	Use this to type in text that you want your statements to show, and place it in the desired location on the form.
Horizontal Line	A straight line moving from left to right.
Vertical Line	A straight line moving from up to down.
Border	A box that you can expand as wide as necessary to group together form items.
Shape	An item that once placed on the form you can select a shape for it to show.

C — Designer / Preview

- Click the **Designer** button Designer to make any adjustments to the fields on the layout (as explained above).

- Click the **Preview** button 

to view how the layout items would look if printed out.

> **Note:**
>
> *The Preview will display the layout using **demo data**, not your Church's data.*

D — Zoom

Use this to zoom in and out, making the view of the statement layout and its objects bigger or smaller.

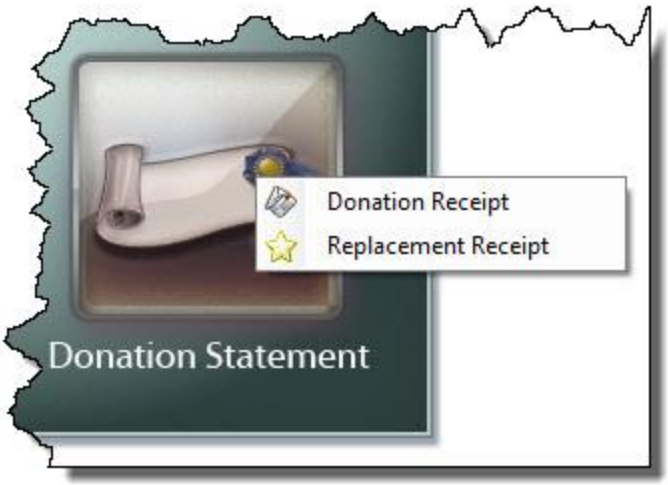
Once you have your layout completely setup, go up to the top left and click the **Save As** button to give it a Statement Layout name, so that you can select it the next time you wish to print your statements with a specific layout. Enter a name or edit the current name and click OK.

> **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.*

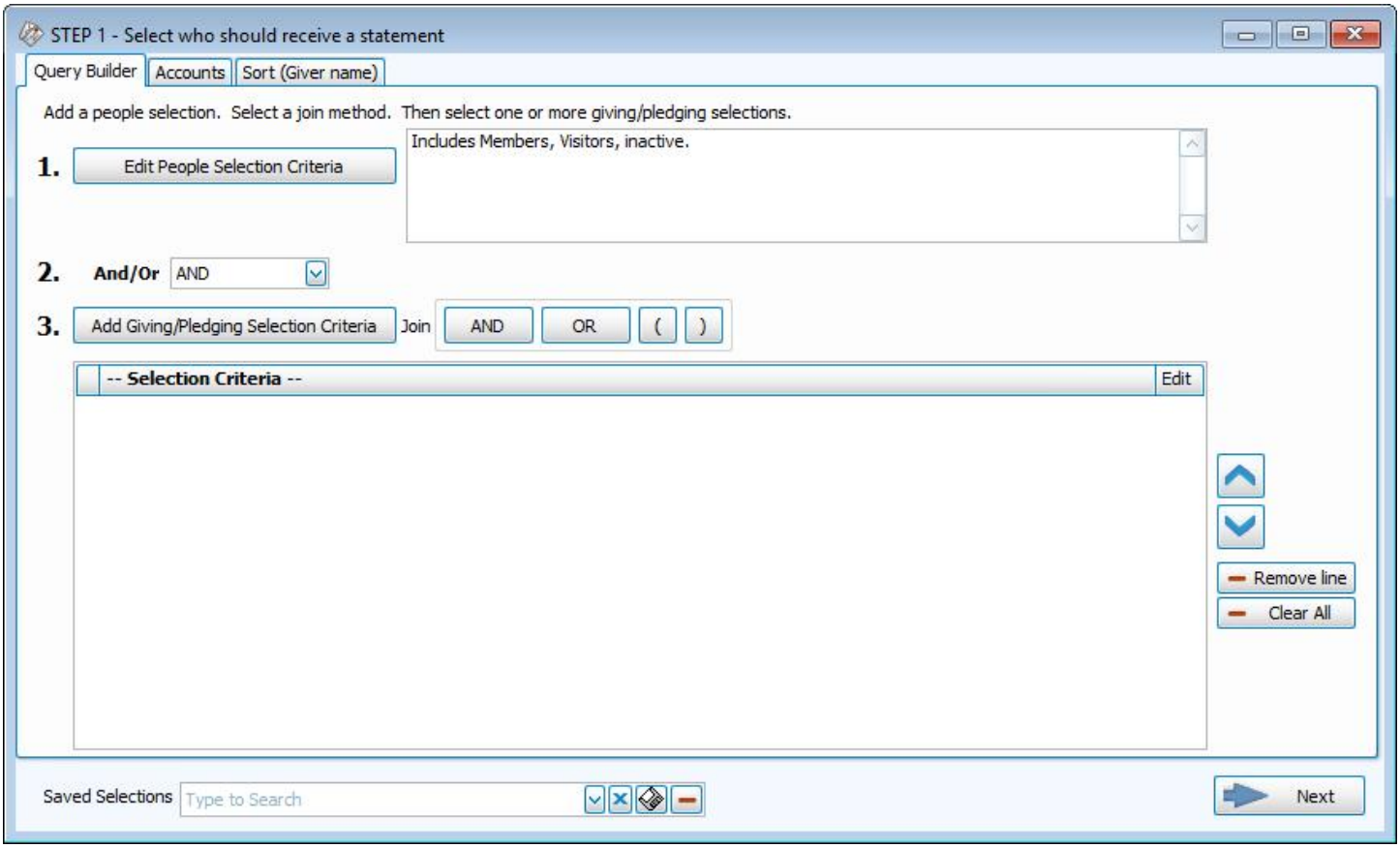
Exit out of Report Designer. The saved layout will now be listed in the drop box for use in the future and you will be returned to the Step 2 screen of Donation Statements *(pg 248)* where you can click **Print** to view a Print Preview and send the statements to your printer.

Donation Receipts

Open the **Donations** Module and click the Donation Statements *(pg 248)* **Quick Access Buttons** (or go to **Reports / Export** in the **Button Bar** at the top of the screen, then click Donations Statement). Then click the **Donation Receipt** button (will appear for Canada users only):

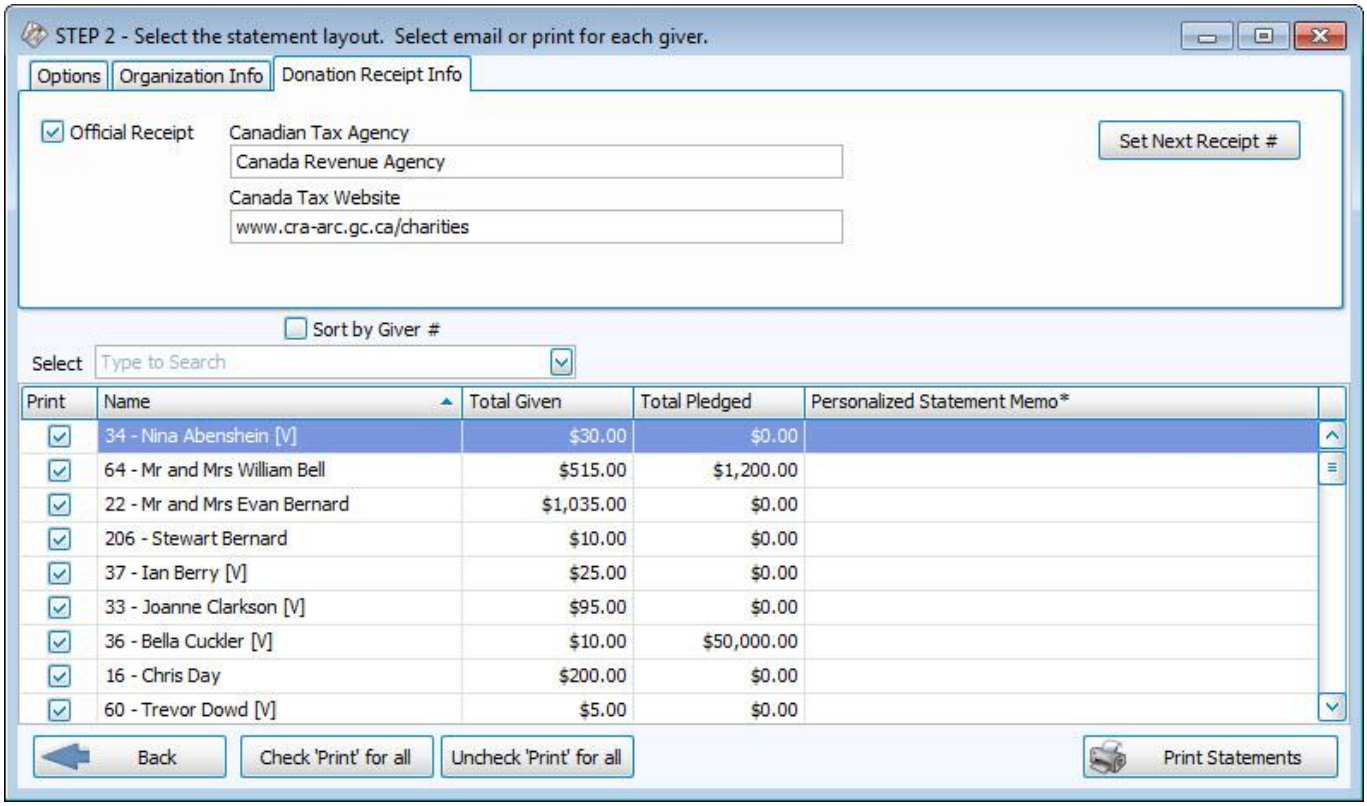


The **Step 1 — Select who should appear on the report** window will appear:



- Enter the applicable selections and Date Range on the **Giving / Pledging Tab** *(pg 282)*.
- Select the Giver using the features on the**Givers / People Tab** *(pg 286)* of the screen. Continue to use the other features and tabs you need for the receipts you want to print. See **Donation Statements** *(pg 248)* for further information.

- When you're finished, click the → **Next** button.
- The **Step 2 — Select the report layout/format** window will appear.
- Before printing, click the Donations **Receipt Info** tab:



- Click the **Set Next Receipt #** button. The number that appears there will be the *next receipt number* and will print on the first donation receipt in the next series of receipts that you print. This number can only be set once, and may NOT be edited without the help of a Church Windows Support Technician.
- Place a ☑ checkmark in the **Official Receipt** box only when you are ready to print the official donation receipts.

  When you click the **Print Statements** button, and print the receipts on paper, the number in the **Set Next Receipt #** option will then increase. If you need to print the receipts for informational purposes only, do not place a check in the **Official Receipt** box. This will let you also make full use of the other functions of the Print Preview screen.
- When you print your receipts and close the Print Preview screen, a message will tell you the numbers of the Donation Receipts that printed. If there are any issues with printing the donation receipts, close the Donation Receipt screen and choose the **Replacement Donation Receipts** *(pg 273)* menu option under the **Donation Statements** *(pg 248)* button.

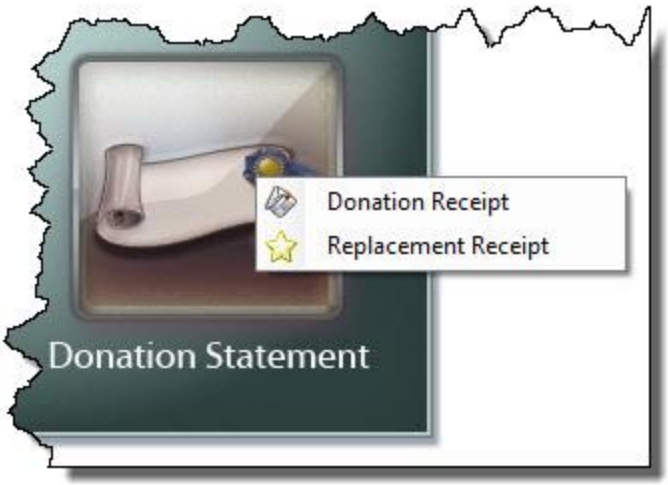
If the ending receipt number does not match the number on the on-screen message, please contact our Technical Support staff at 800.533.5227 or support@churchwindows.com (be sure to add this address to your email contacts list to

ensure delivery) or visit the Support Center on our website for additional training materials. for help in re-setting your receipt numbers.

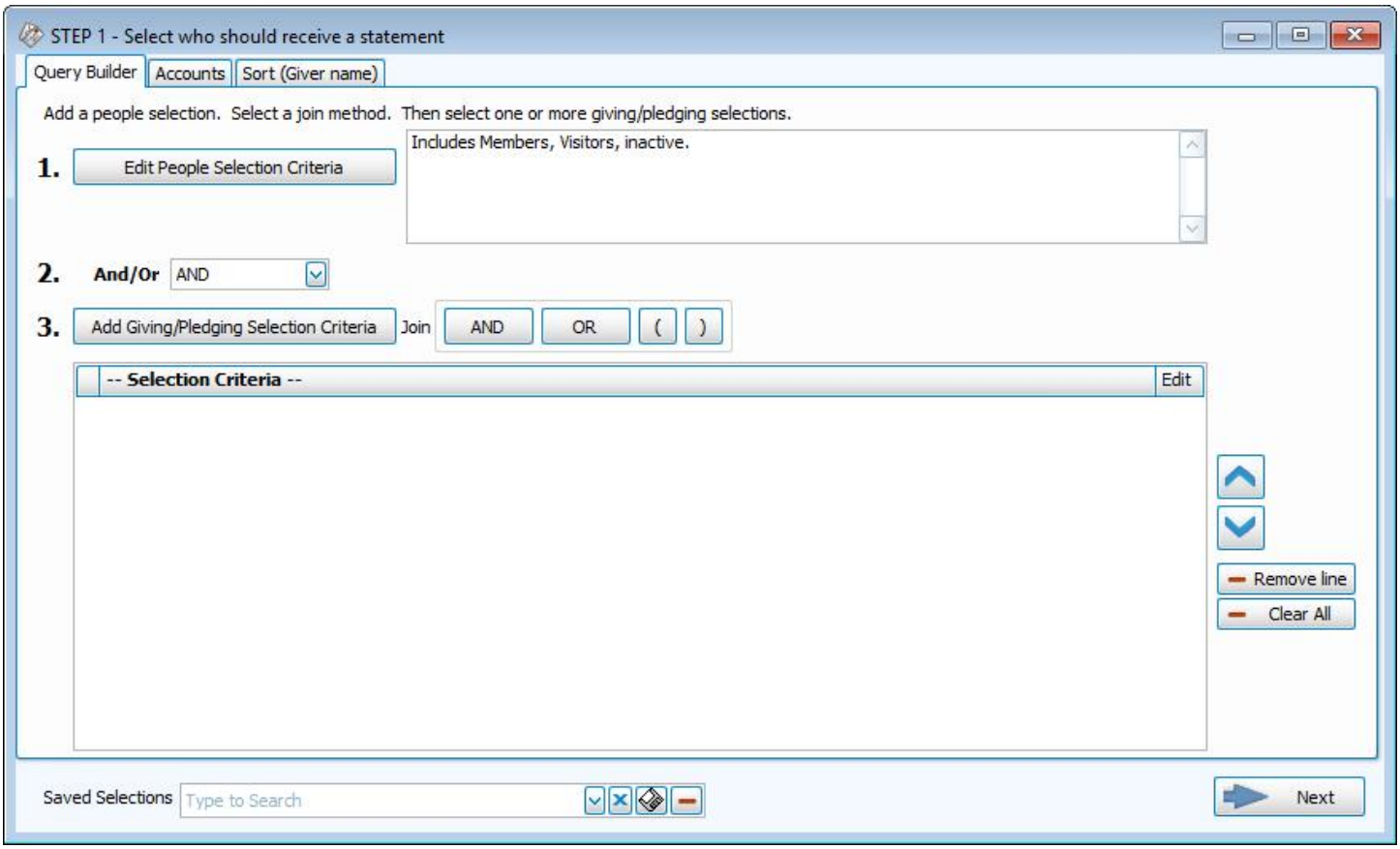
Replacement Donation Receipts

If you need to print another **Donation Receipts** *(pg 270)* for a contributor for tax purposes, then you do need to know what the original receipt number was and you'll need to know the contributor's envelope number as well.

To create the replacement donation receipt, open the **Donations** Module and go to **Reports / Export** and click **Donation Statement**. Then click the **Replacement Receipt** button (will appear for Canada users only):

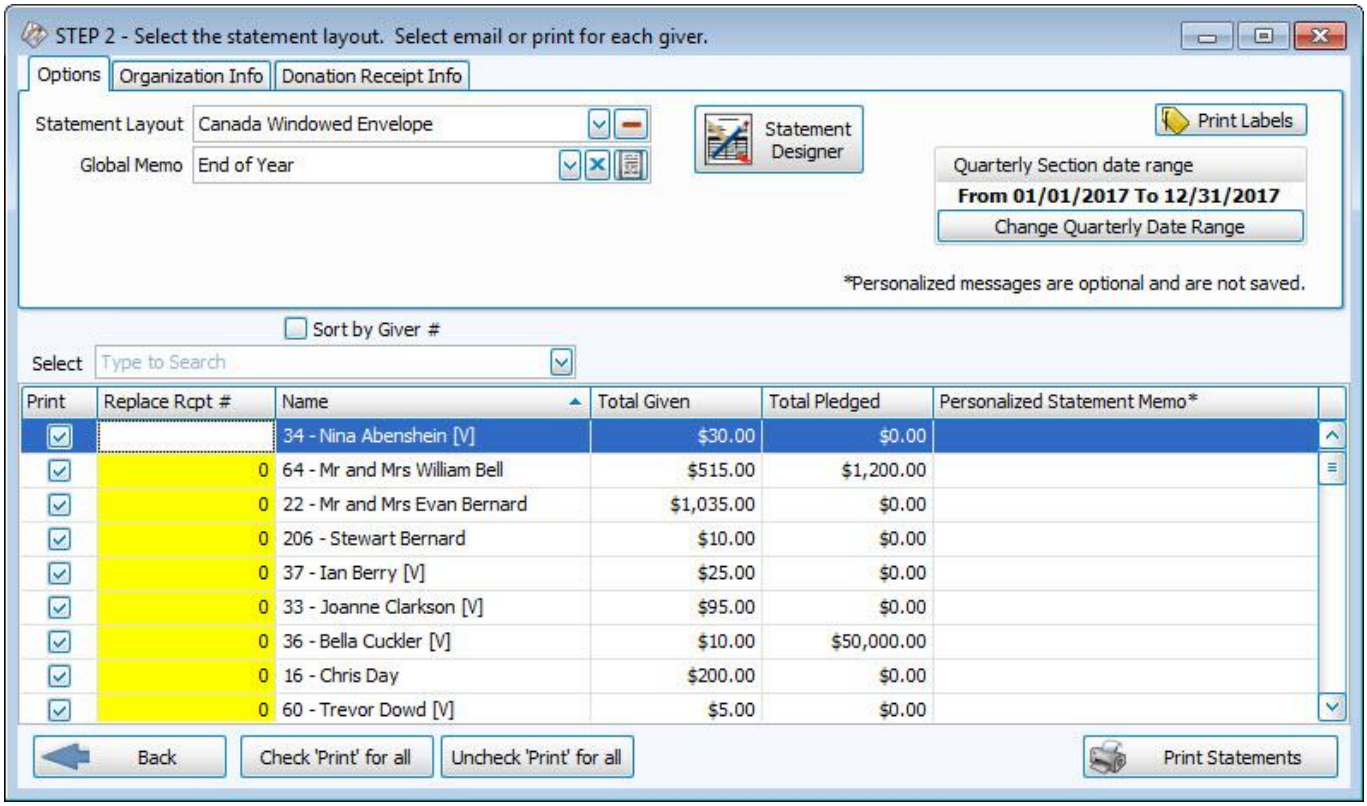


The Step 1 window will appear:



- Enter the applicable selections and Date Range on the **Giving / Pledging Tab** *(pg 282)*.
- Select the Giver using the features on the**Givers / People Tab** *(pg 286)* of the screen. Continue to use the other features and tabs you need for the receipts you want to print. (See **Donation Statements** *(pg 248)* for further information).

- Click → **Next** to move on to **Step 2 — Select the report layout/format**:



- Only the Giver needing a replacement receipt should be selected.
- Enter the original receipt number into the column titled **Replace Rcpt #:**.
- Click **Print Statements**. The new receipt will compile on the Print Preview screen. There will be a message on the receipt that states "*the next receipt number* cancels and replaces receipt # the number in the *Replace Rcpt #* field."
- Verify that the receipt numbers are correct. Close the Print Preview screen if you need to make corrections, and click **Print Statements** again to view them. When you are ready, click the Print button to send this receipt to the printer. The system will tell you the Donation Receipt #s that were printed. Check the receipt when it comes out of the printer and confirm that this is the correct new receipt number.
- Click **OK** to make the message disappear.

If the receipt numbers still print out incorrectly, 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..

Setup Email

Use the following instructions to set up your email address(es) to be able to send emails directly from Church Windows.

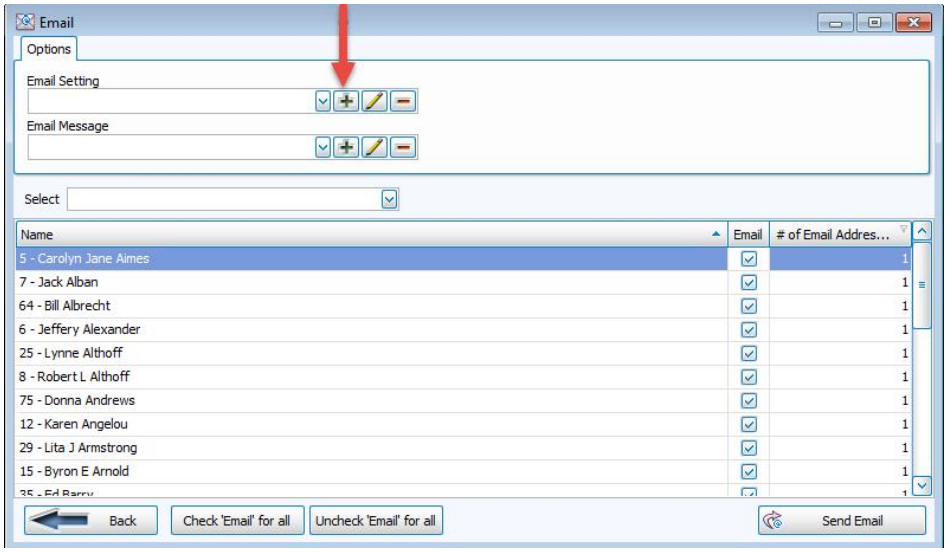
- From The Initial Portal of Church Windows choose either **Membership** or **Donations**
- Click **Reports / Export** in the **Button Bar** at the top of the screen
- Click **Send Email**
- This will open the **Email** window. There are three tabs here: Givers / People Tab *(pg 286)*, Giving / Pledging Tab *(pg 282)*, **and** Accounts tab *(pg 285)*.
- To setup email, simply click → **Next** without selecting any criteria.

Email Settings

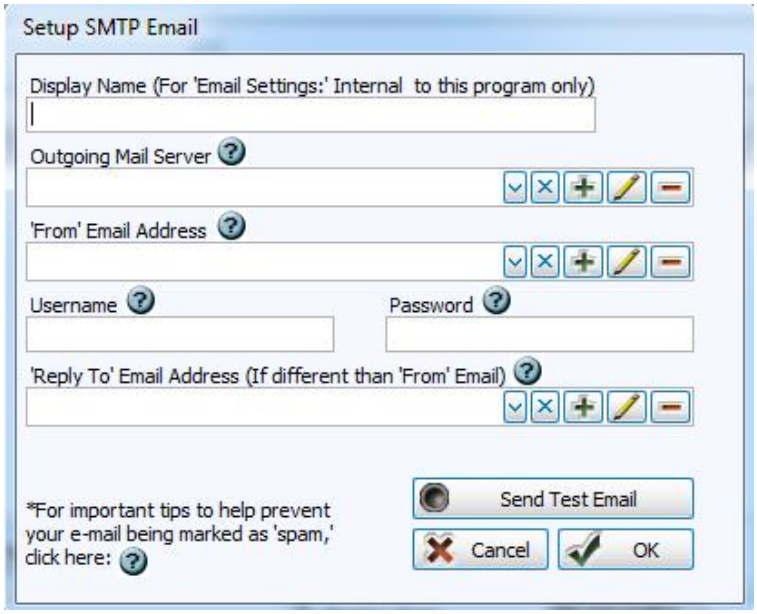
Different Users may set up the email settings for the email account they wish to use for sending the emails **from**. For example, the Office Administrator may want to email newsletters or individuals; the Choir Director may want to email the members of the choirs; and the Treasurer may want to send Donation Statements *(pg 248)*, each can configure their own email account from which to send messages. The information entered for each user will be saved; it will only need to be entered once.

On the **Options** tab of the Send Email screen in any module, there is a dropdown field for the **Email Setting.**

- To add a **new** email address, you will need to create a new email setting by clicking the **Add** button beside the field:

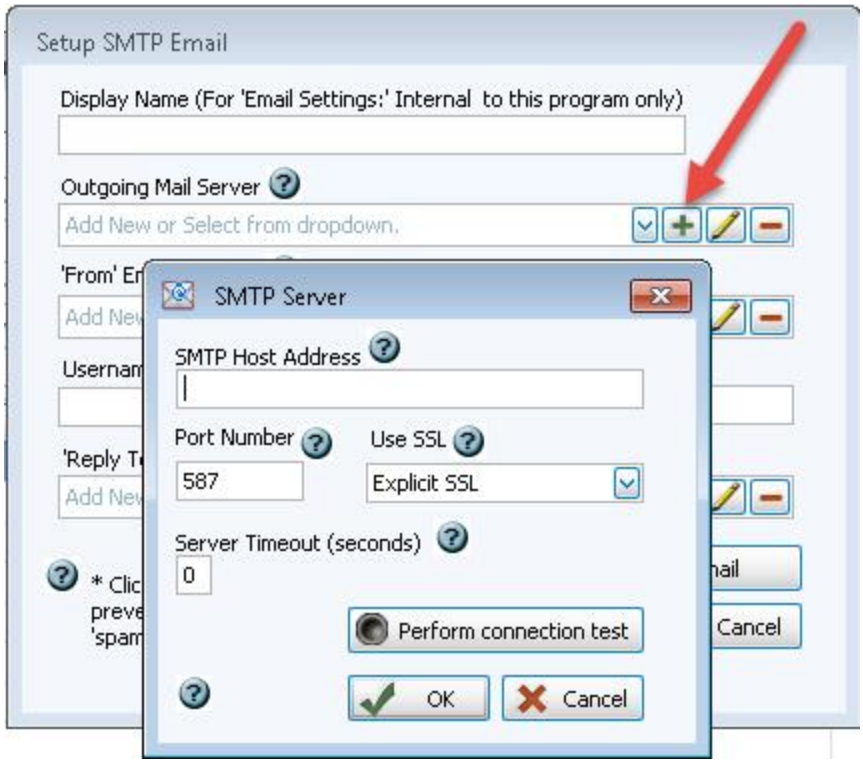


- The **Setup SMTP Email** screen opens, which stores the settings that make it possible for you to email people out of the database:



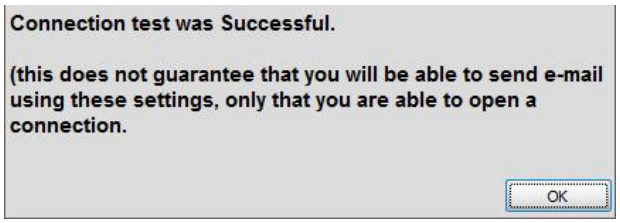
- **Display name (For 'Email Settings:' Internal to this program only):**
  The name entered in this box is the name under which the settings you make on this screen will be saved. This then allows you to choose a **Display Name** for the Email Settings box on the Options tab. Different groups within the Church can be set up with their own Display Name for different email addresses. An example might be *Secretary's Mailings* or *Pastor*.

- **Outgoing Mail Server (SMTP):**
  Select an existing name from the dropdown box, or if you have not yet set this up, click the **Add** button to open the SMTP Server settings:



> **Note:**
>
> *The SMTP Host, Port, and SSL information must be valid for your email address provider (e.g. gmail, verizon, sbcglobal, aol, etc.), this information must be obtained by contacting the customer support for your Internet Service Provider or ISP (which is the company that provides your internet connection) and/or the company hosting your email address, or by searching the internet. Church Windows has no way of obtaining this information for you.*

- When the information has been entered on this screen, you must click "Perform Connection Test". If successful, you should receive a message similar to this:



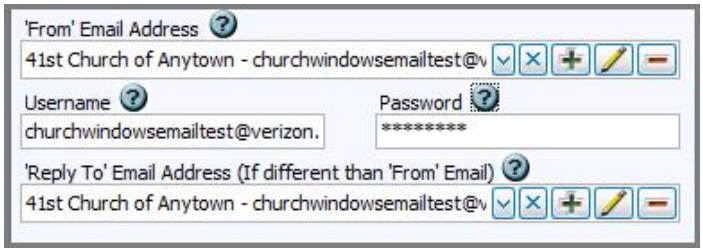
- If the connection test was successful, click **OK**.
- If the connection test fails, the data entered is wrong.
- Verify that you have entered the SMTP settings or contact your Internet Service Provider (the company that hosts your email address) to obtain the correct settings.

- **'From' Email Address**:
  Select an existing email address from the dropdown box. Or, click the **Add** button to enter your (or your organization's) email address:

  - This is the address your email will be sent *from*.
  - **Email Address**: Enter the *full email address* including the **@** and **.com** or **.org** part.
  - **Name or Organization Name**: Enter the name you want recipients to see when they receive your emails.

- **Username**:
  This is the your *full email address* including the **@** and **.com** or **.org** part.

- **Password:**
  This is the password you already use to log into your **'From' Email Address:**



Important!

Whenever you **change your password for your email address**, you **MUST** also change it here in these email settings in order to continue using that address in Church Windows.

- **'Reply To' Email Address (If different than 'From' Email):** (*Optional*)
  Click the **Add** button to set up the email address people will use to send a reply. If a recipient replies to your emails by clicking 'reply', the email will be sent to this address instead of the address from which you are sending the email.

- Review the information to make sure that all the information you intend to save is correct.
- Then click the **Send Test Email** button.
- Type an email address that you know you can immediately access.
- Click **OK** and a message will be sent to the email address you specify.
- Check to see if you received an email message with the subject **"TEST Email"** from the **'From' Email Address** or from the **'Reply to' Email Address** (if used) address you entered.
- After receiving the test email, click the **OK** button on the Setup SMTP Email screen to complete the email setup.

- If you get an error message that your test email failed, verify your SMTP Settings by contacting the customer support for your Internet Service Provider (ISP).

Once you have completed the setup as described above, please reference the topic Send Email or **Email Donations Statements** *(pg 257)* for specific information on choosing recipients and composing your message.

Additional Report Options

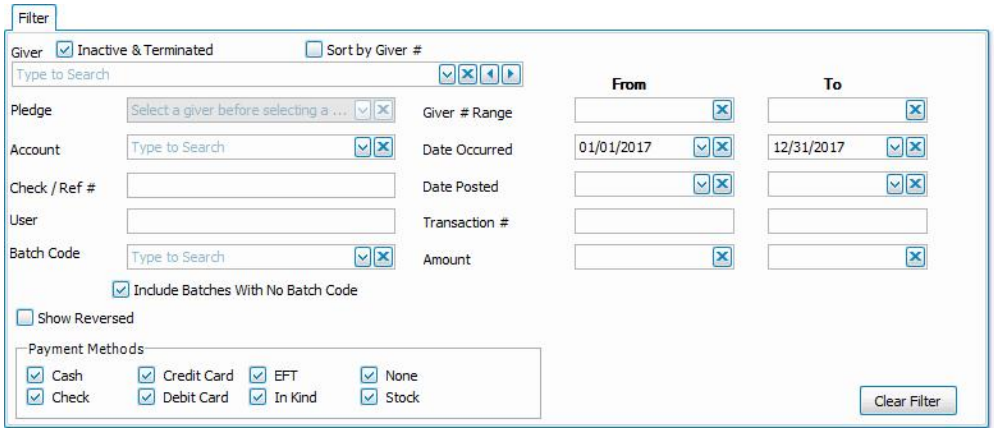
All **Reports, Labels, and Statements** *(pg 191)* provide a different set of options that you can use to adjust the report contents and format. These options are located in the same screen from which you are running the report, separated into tabs at the top left. For example:

The purpose of the image above is to indicate a visual example of tabs where you can find additional report options. Though the above image only points out only some of these tabs, each report has its own set of tabs. Such tabs are also found in the **Donation Browser Options** *(pg 15)* screen.

Choose any of the following tabs to apply additional settings:

Filter Tab

The **Donation Browser Options** *(pg 15)*, **Donations Log Report** *(pg 194)*, and the **Giving Summary** *(pg 195)* provide you with a tab of settings that you can use so that the report or screen shows you only the information that you seek.

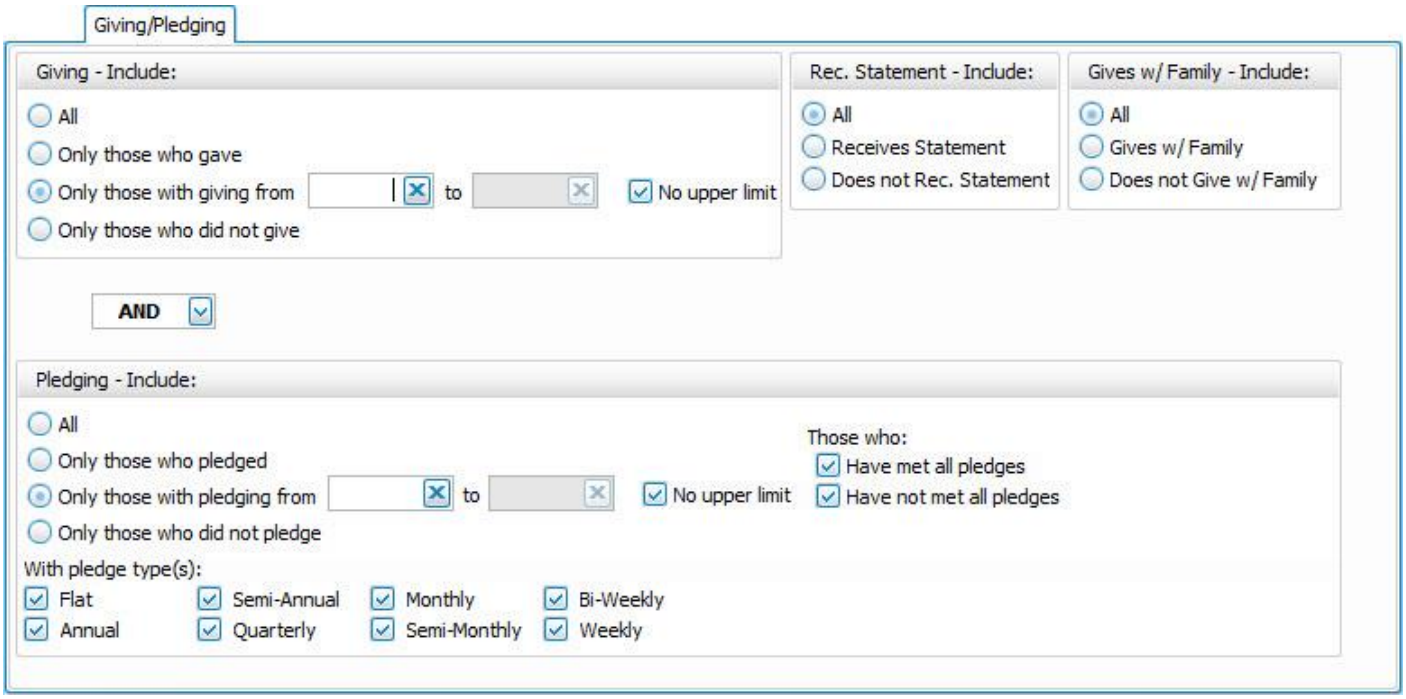


- **Giver:** The name of the Giver, Giver Number (if applicable), and type of Giver (individual or group)
- **Pledge:** The name of the pledge account and the date range for which the pledge is in effect.

- **Account:** The giving account and accompanying ID.
- **Check / Ref #:** The specific check or reference number.
- **User:** The name of one of your **Users** who enters Donations.
- **Batch Code:** The name of the batch and a description that identifies the code.
- **Include Batches with No Batch Code**: Place a check in this box if you want the report to include batches where a batch code was not recorded with the batch when originally entered in the software.
- **Giver # Range:** Enter the starting and ending Giver numbers that you want the report to show.
- **Date Occurred:** The date on which the actual donation took place.
- **Date Posted:** The date on which the donation was entered into the system.
- **Transaction #:** The number given by the software when the donation is entered.
- **Amount #:** The dollar amount recorded with the donation.
- **Show Reversed:** Place a ☑ checkmark in the box to display reversed donations on the report. Otherwise, reversed donations will not show on the report.
- **Payment Methods:** Keep ☑ checkmarks next to all of the payment methods you want to be included.

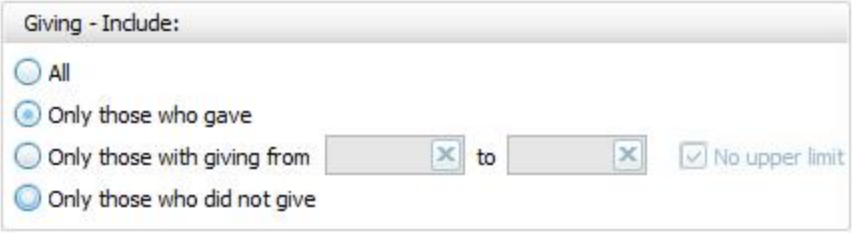
Giving / Pledging Tab

Every time you print **Reports, Labels, and Statements** *(pg 191)*, you can use the **Giving / Pledging** tab to further specify the pledge and/or giving requirements that Givers must meet in order to have **Labels** *(pg 229)* or **Donation Statements** *(pg 248)* printed for them. The specifications that you make will only affect the reports that you print, and will not affect the information originally stored on the **Manage Givers** *(pg 133)* screen.



Giving — Include

Choose the option that best describes the Giving information you wish to see:



- **All** — Click this option to have all kinds of Givers regardless of their giving included.
- **Only those with giving from** — Enter a desired range of donation dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who gave**
- **Only those who did not give**

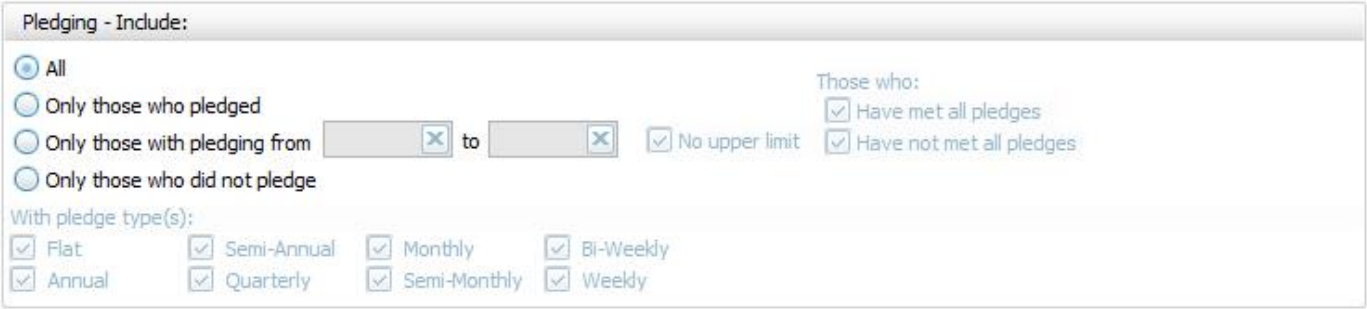
AND / OR

Between the ***Giving — Include*** and ***Pledging — Include*** areas of the screen, use the **AND** / **OR** dropdown box to specify how the criteria must be fulfilled:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.

Pledging — Include

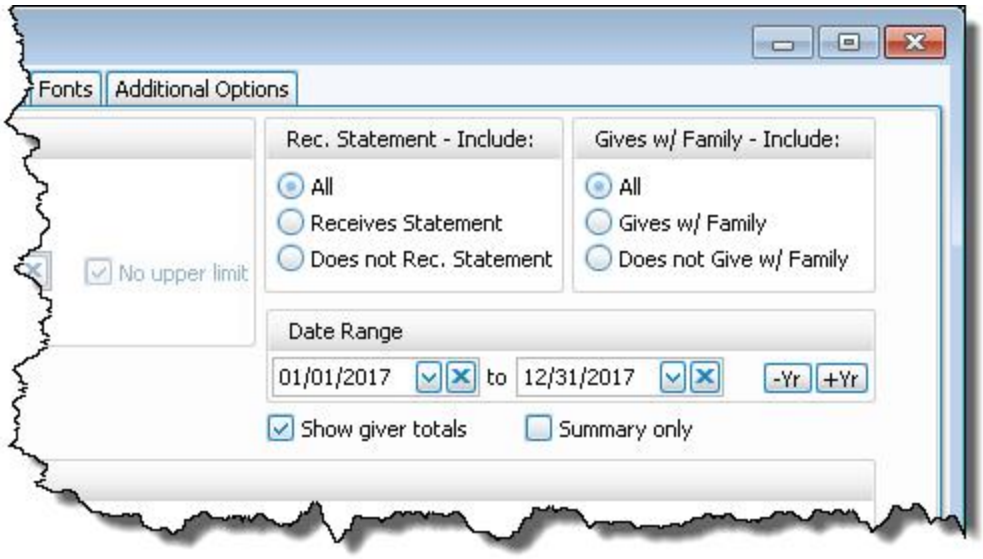
Choose the option that best describes the information regarding **Pledges** *(pg 98)* that you wish to see on your report:



- **All Givers** — Includes all Givers regardless of Pledging.
- **Only those with pledging from** — Enter a desired range of pledge dollar amounts that you would like to include. If the range has no maximum amount, place a check in the **No Upper Limit** box.
- **Only those who pledged**
- **Only those who did not pledge**
- **Those who:**If applicable, place or remove a ☑ checkmark for **Have Met All Pledges** and/or **Have Not Met All Pledges**.
- **With Pledge Type(s):** Place a ☑ checkmark next to any or all frequencies of pledges you want to include on the report.

Other Options

At the top right of the Giving / Pledging tab there are sometimes a few more options, these include:

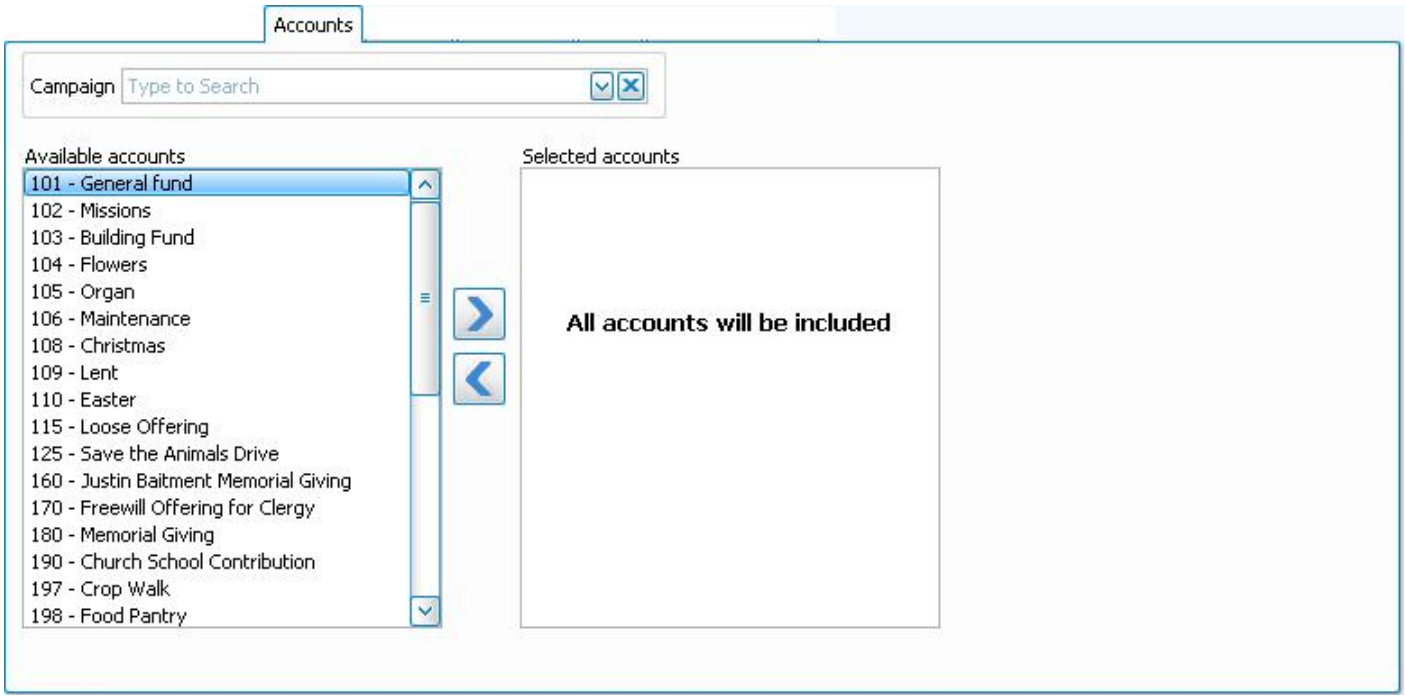


- **Receives Statement** *(pg 158)* — specify if you only want to see those who do or only those who do not receive statements. (This is not an option on Statements as Givers without "Receives Statement" checked cannot be included)
- **Giving as a Family or Giving Separately** *(pg 158)* — specify if you only want to see those who give alone or only those who give as a family.
- **Date Range** — select the time period that you want the report to present.
- **Show Giver totals** — if you want to see a total for each Giver on the report.
- **Summary only** — if you want to see only the summary, instead of an accompanying, individualized listing by Giver.

Accounts tab

The **Pledge / Giving Analysis** *(pg 203)*, **Giving Comparison** *(pg 212)*, **Labels** *(pg 229)*, and the **Donation Statements** *(pg 248)* screens provide you with a tab called Accounts. Use the Accounts tab if you want the items you are printing to contain information that pertains only to certain giving accounts where money had been given.

Click to select an account from the **Available Accounts** list on the left side of the Accounts tab. Click the › right button and it will appear in the **Selected Accounts** list on the right side. To remove any account from the **Selected Accounts** list, click it and then click the ‹ left button.

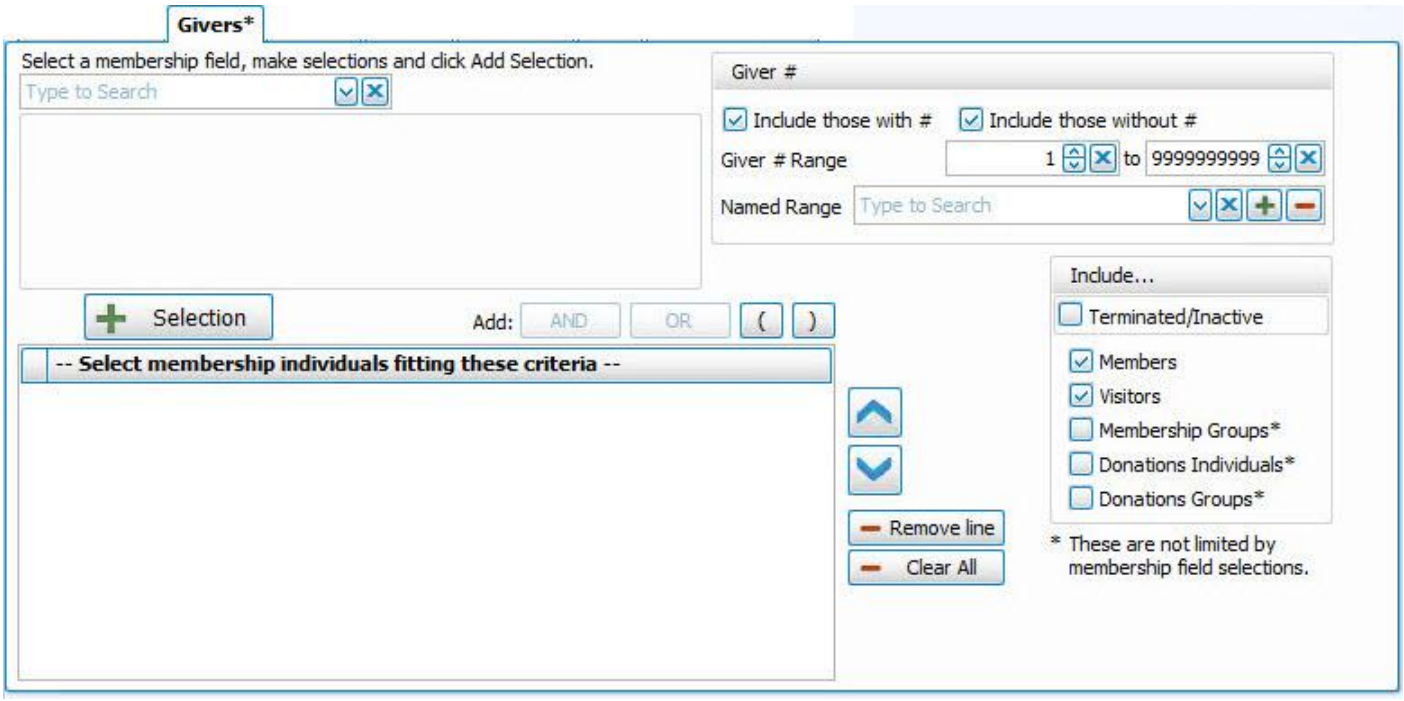


If no changes are made to the Accounts tab, the **Selected Accounts** list will read "All accounts will be selected ".

Givers / People Tab

The **Pledge / Giving Analysis** *(pg 203)* and the **Giving Comparison** *(pg 212)* report screens as well as various other screens provide you with a panel of adjustments that you can use to determine the kind of Givers to include on your reports. Use the following to choose Givers based on certain information that is currently being kept track of in The People File.

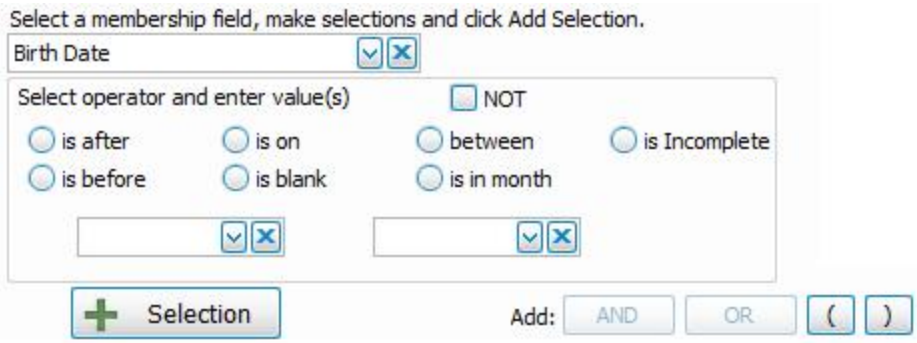
> ***Note:***
>
> *When you go to print* ***Labels*** *(pg 229), the Givers tab is referred to as the* ***People*** *tab, but consists of the same screen layout (see image below).*



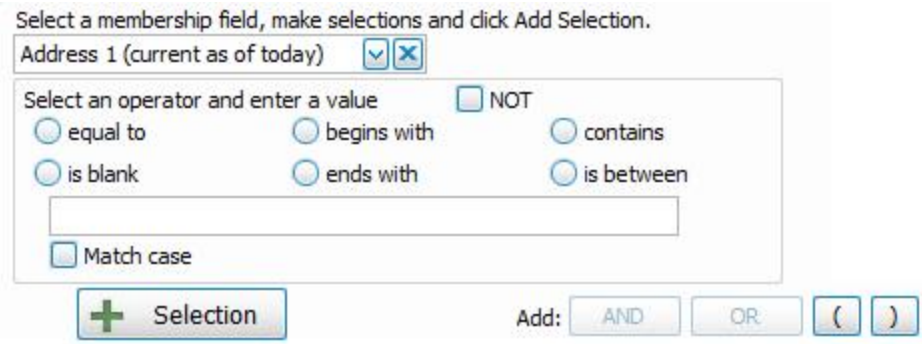
Select a Membership Field

Choose any field in The Individual Record or The Family Record to compile a search query limiting the people who will be included on the report. To include everyone, do not make any selections.

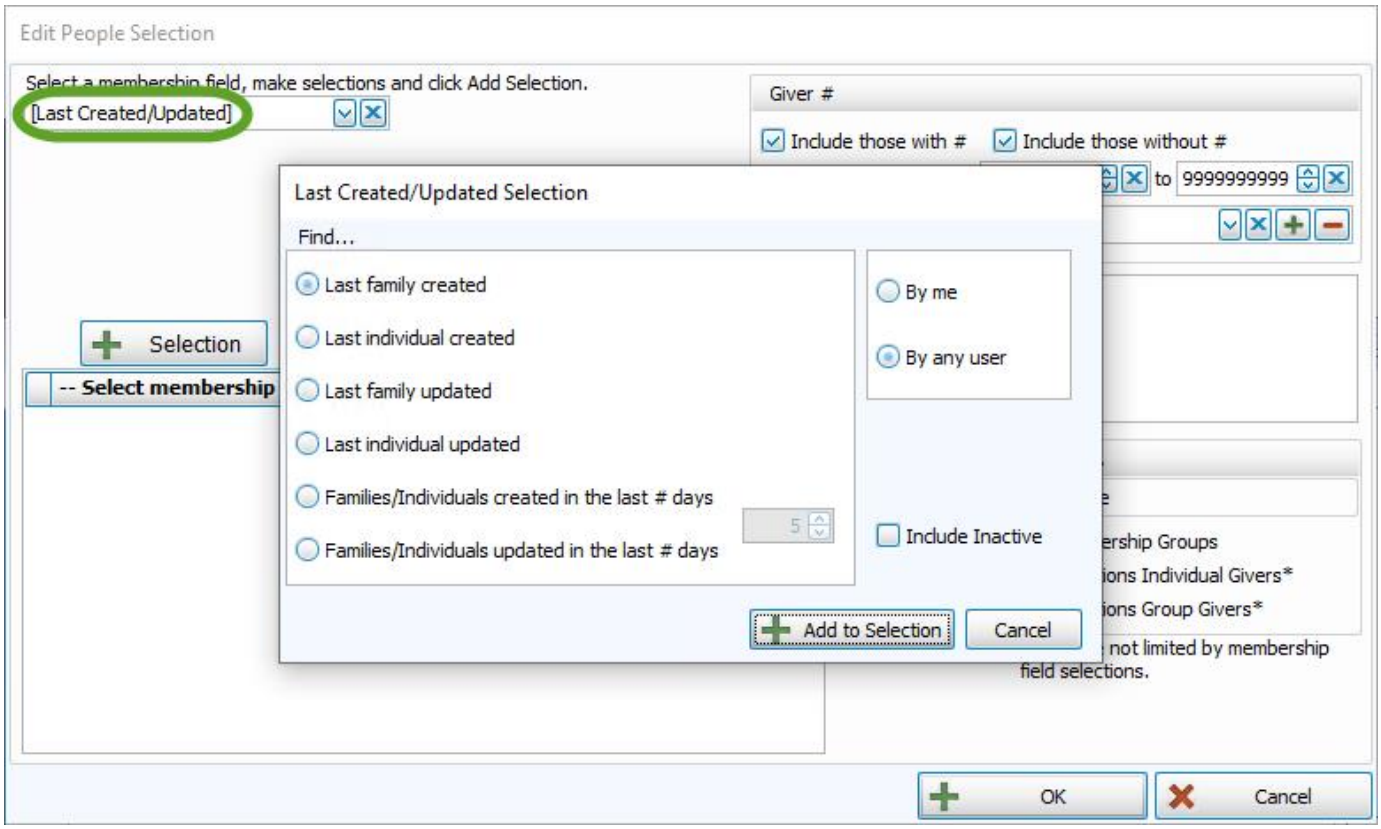
The different Field Types will provide different "operator" choices, such as:



OR

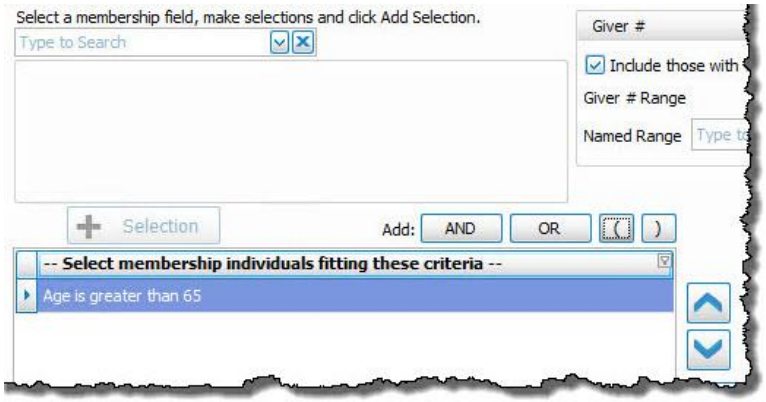


The selections at the top of the list in [brackets] will open a separate window for your to enter your criteria, then press the Add to Selection '**Add to Selection**' button to return to the People Selection Criteria screen. These selections include: **[Attendance]**, **[Groups / Classes]**, **[Skills / Interests]**, **[Visits]**, or **[Last Created/Updated]**:



Once you make a **Membership Field Selection**, to add it to the search criteria click on the Selection '**Add Selection**' button. It will add it to the **-- Select membership Individuals fitting these criteria --** box below.

For example, if you want to add ages greater than 65 to the criteria, just use the Membership **Field** dropdown to select Age like above, then select the "greater than" operator, and put 65 in the first box. Then click on the Selection button. It will add it and look like this:



Once you have at least one criteria added to your selection, you can either continue selecting other options for the report with just one criteria, or use the Membership **Field** dropdown again to select additional options.

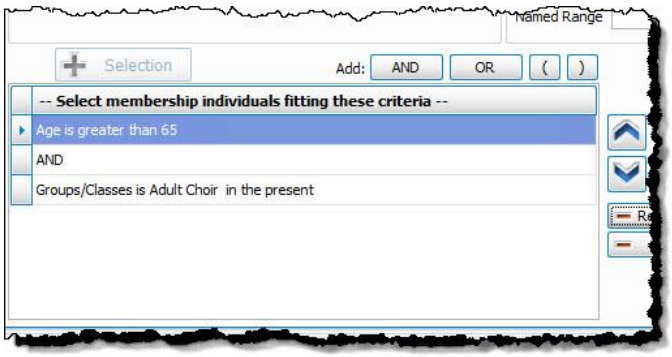
Before you can click on the Selection button to add additional criteria, you must either click the **AND** or the **OR** button to the right of the Selection button to specify how you want the selections applied:

- **AND** — Use to search for people who meet *BOTH* of the criteria, allowing *less* people to be included.
- **OR** — Use to search for people who meet *EITHER* of the criteria, allowing *more* people to be included.
- For more complex searches, you can also add parentheses to select people meeting either or both of several different combinations of criteria selections.

Then you will be able to click on the Selection button.

So for this example,

- Select age greater than 65
- Then click the Selection button
- Then select Groups / Classes and choose those presently in the adult choir
- Then click "AND"
- Then click the Selection button again, and it will look like this:



Giver

- If you would like to include all Givers, regardless of whether the Giver has a giving number stored on record, make sure that a ☑ check mark is placed in both **Select Givers with #** and **Select Givers without #** boxes.

  Otherwise, place a check mark in only one of the two boxes. (If needed, see Assign Giver Numbers *(pg 162)*)
- Use the **Giver # Range** boxes to choose the range of Giver numbers for the labels or statements you want to print.
- If you have saved a **Giver # Range** in the past and would like to reuse it, select it from the **Named Range** box.
- You can also add a new **Named Range** by clicking the **Add** button. Or, if you no longer need a **Named Range** that currently exists in the list, select it and click the button.

Categories

If you wish to exclude **Visitors** (or people in other Family Categories you may have added), click the ☑ check-box to uncheck the Categories you do not want to see on the report.

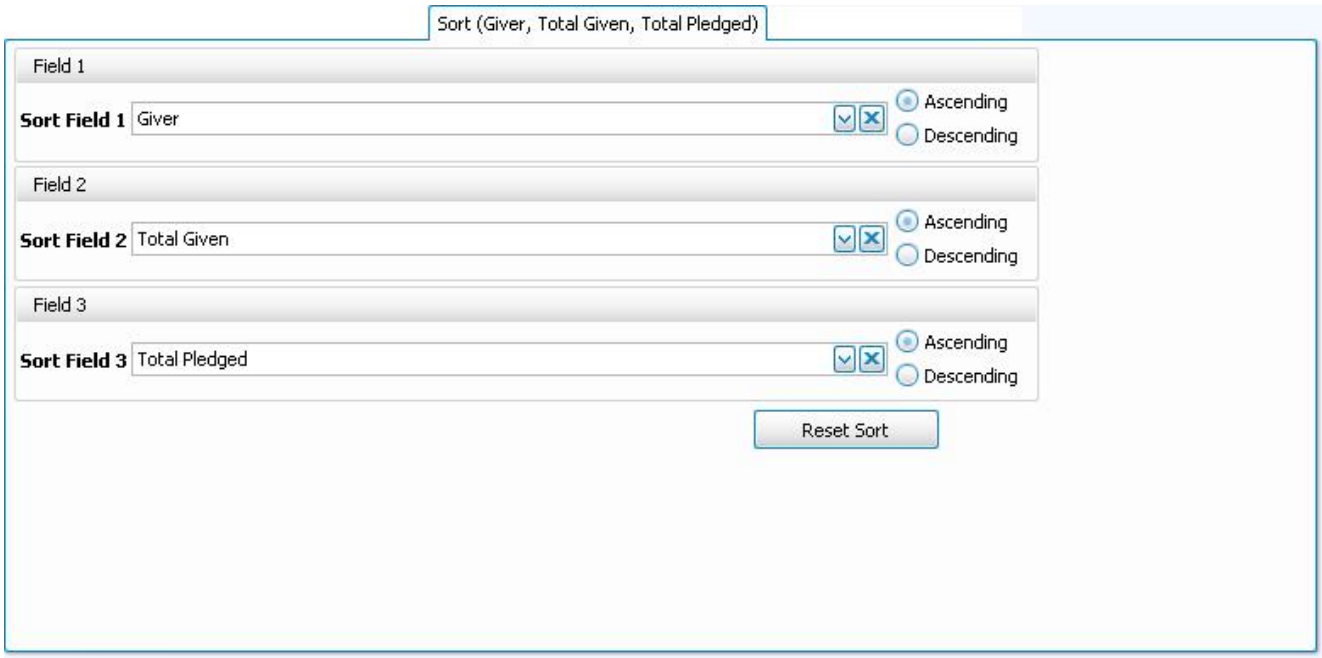
Include...

- If you wish to include **Inactive** givers in the report, click the box to place a ☑ checkmark. With a checkmark in the box, the report will show both of the following:
  - Givers that have been marked as **Inactive** on the **Manage Givers** *(pg 133)* screen of the **Donations** Module.
  - Givers that have been marked Inactive with an **Inactive Reason** (formerly Reason for Termination) on The Individual Record in the **Membership** Module.
- Place a ☑ checkmark in the boxes if you also wish to include:
  - **Membership** Groups / Classes,
  - **Donations Individual Givers** *(pg 146)**
  - **Donations Group Givers***

  (The asterisk * next to Donations Individual and Group Givers indicates that the Membership criteria selections will not be applied to them and they will be included on the report regardless.)

Sort / Group & Sort Tab

Use this tab to sort the results by up to three columns (sort fields). Whether you are viewing the **Group & Sort** tab, or the **Sort** tab, use the following options to change the order of the contents of your list:

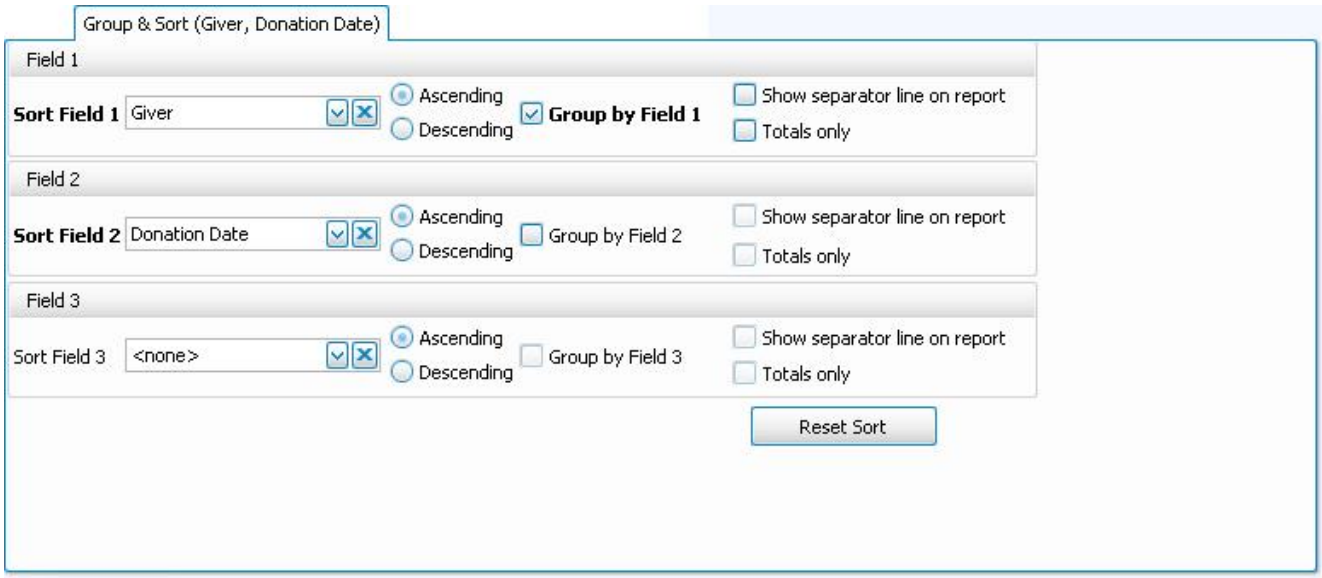


- **Sort Fields:**
  Choose the name of the field(s) by which to sort the contents of the report:
  - The field chosen in *Sort Field 1* will sort the entire list by that field first.
  - Then, choose a field from *Sort Field 2* if you want sort the list further within the order chosen in *Sort Field 1*.
  - To sort the list in an additional order within the order chosen in *Sort Field 2*, choose a field from *Sort Field 3*.

> For example, you could choose Zip Code for *Sort Field 1*, then within each Zip Code you could make *Sort Field 2*Status Code, then within each Status Code grouping you could sort by Name for *Sort Field 3*.

- **Ascending & Descending:**
  Choose the order in which you want the contents to be sorted:
  - **Ascending** — lowest to highest / alphabetical
  - **Descending** — highest to lowest / reverse alphabetical

The following choices appear only on the **Group & Sort** tab, place a ☑ checkmark in the box to select that option:



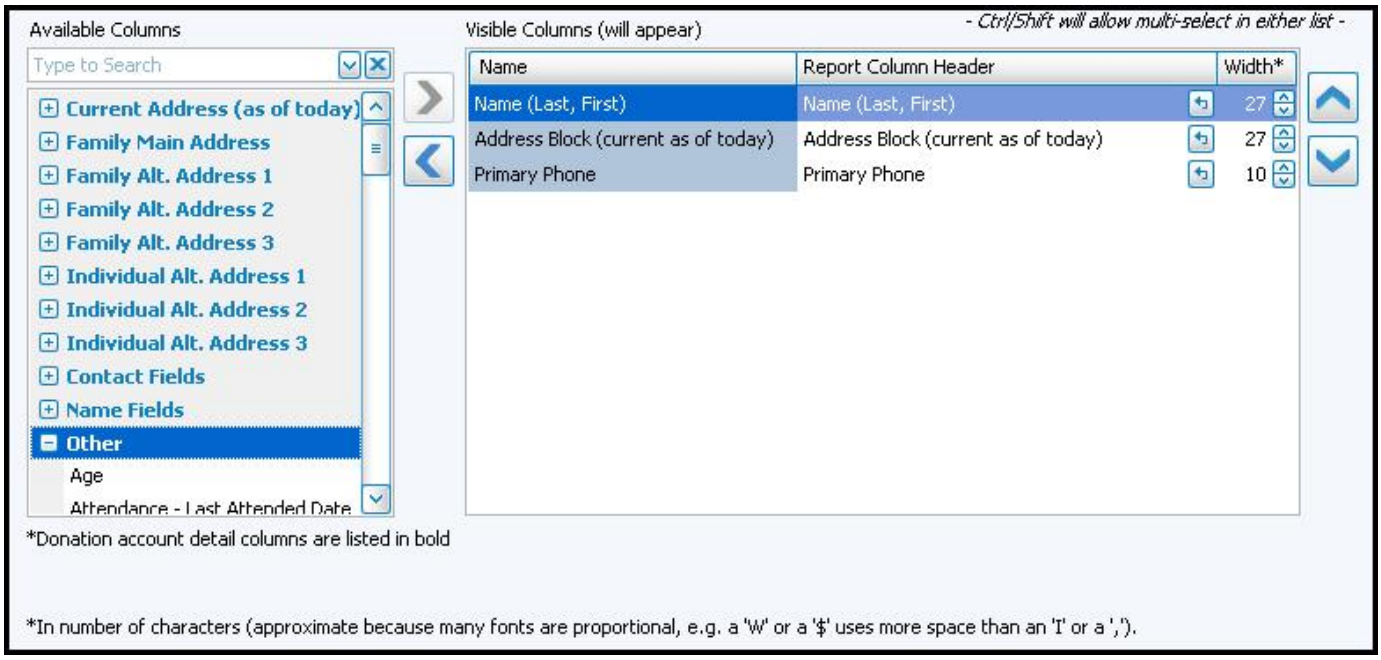
- **Group by Field** — Group the contents of the report by the item selected in that sort field.
- **Show Separator Line on Report** — Show a short horizontal line in between each grouping of information.
- **Totals Only** — Show only a total to represent the donations grouped by the selected sort field.

Click the **Reset Sort** button to change the selections back to their original state.

Columns Tab

The **Column Selector** or **Columns Tab** allows you to decide which fields from The Individual Record or The Family Record will be visible on the report and which will not be visible.

On the left hand side **Available Columns** are the columns that are not showing but are available to be shown if desired. On the right side **Visible Columns** are the columns that are currently selected to be shown:



- If needed, to browse the **Available Columns**, click the + to expand a group of fields or use the "**Type to Search**" dropdown box to choose a 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.
- 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.

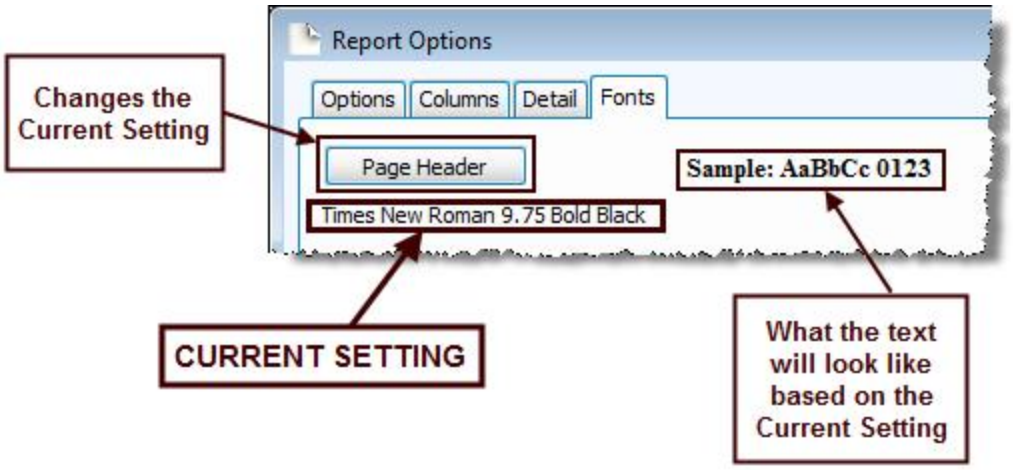
> For example, you could remove "(current as of today)" from the Address field's Report Column Header, as it would likely be unnecessary to include on the report.

- Each column is set to print at a certain column width automatically. You can also change the width of the columns that show on the report. Raise or lower the number in the **Width*** column according to your preference.
- Click **OK** when you are satisfied with your column selections.

- You can click on the '**Select Fields**' button to the right of the report name dropdown list to reopen the **Column Selector** and make additional changes later.

Fonts Tab

Change the size and style of the font that prints on the report by clicking the Fonts tab, choosing the **Page Header**, **Column Headings**, and/or **Body Text** settings, and applying your selections.

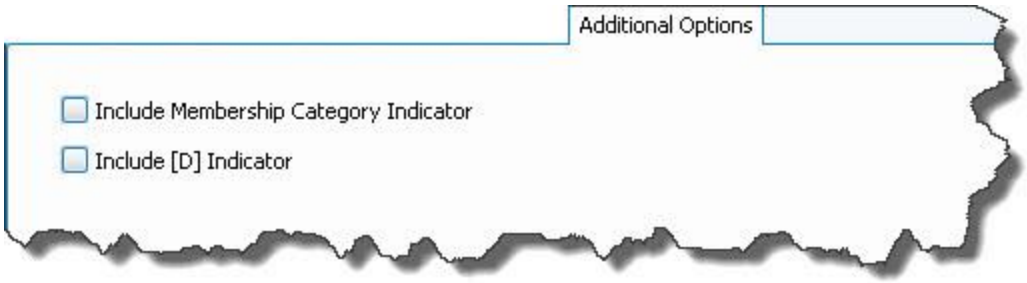


Choose the setting for the item you wish to change, and another screen will appear for you to change the font.

Change to the desired font settings and click **OK**. When you click **OK**, a sample set of text will show you how the report text will print due to the selections you made. Click **Reset to Default** to change all fonts to their original settings.

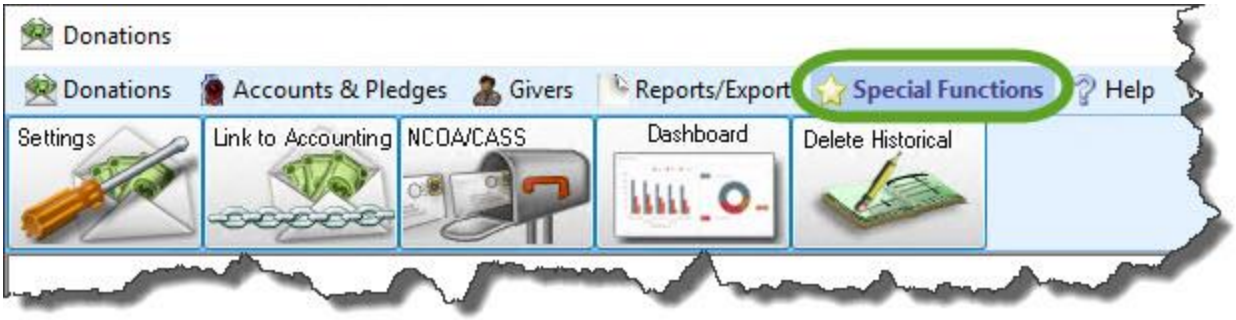
Additional/Report Options Tab

Many reports will offer the option of including a letter in brackets after the names of people on the report to indicate their assigned **Category** (e.g. [V] for Visitor, [D] for Donor, etc.):



Chapter 6 - Special Functions

Special Functions



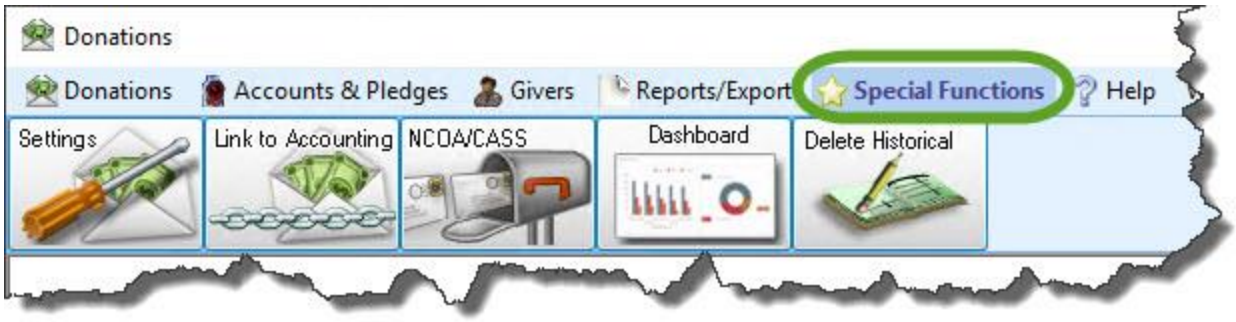
Here you can change Users' **Donations Settings** *(pg 297)* to meet each user's individual needs, **Link Donations to Accounting** *(pg 301)* to **Accounting** for transfer, and setup and utilize the CASS Certification and NCOA Processing.

Donations Settings

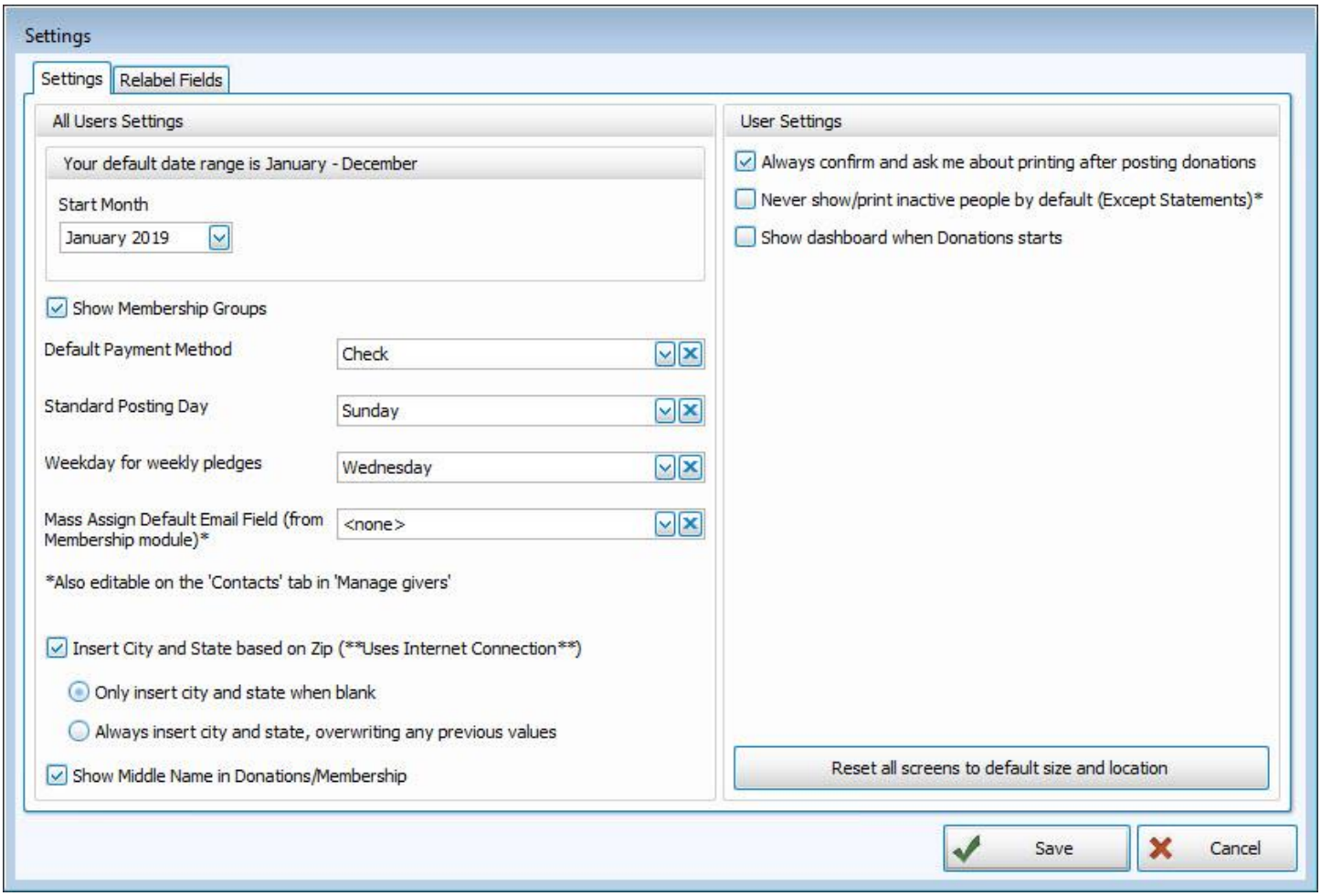
Use the Settings screen to set the starting month on which your Church begins accepting donations for the year. You can also set the day that your Church most commonly collects donations from its Givers, as well as the most common form of payment in which donations are made.

To access the Settings screen:

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



2. Click the **Settings** button from the options that appear underneath.



Make your selections from any or all options described below. When finished click the **Save** button, or click **Cancel** to discard your changes.

Settings tab

All User Settings

These setting selections on the right side of the screen affect the whole program.

- **Your default date range is...**
  The **Start Month** sets the beginning and end of the Donations Year. Click the dropdown button and select the starting month in which your Church begins its Donations year and the default date range will adjust accordingly to show you when the year ends.

- **Show Membership Groups**
  Place a ☑ checkmark in this box if you want to show the Groups from Membership in Donations to track their giving.

- **Default Payment Method**
  Click the ☑ dropdown button and choose the method of payment that you see as being most likely to be donated by a Giver to your Church. The payment method chosen here will appear automatically on the **Enter Donations** *(pg 29)* screen.

- **Standard Posting Day**
  Choose the day that your Church is most likely to accept donations from the Givers. By choosing a day here, you enable a message to warn you in the case where a donation is being posted on a day other than what is selected here on the Settings screen. You can change this date at any time. Click the ☒ clear button to empty the field, or choose the ☑ dropdown button and choose a day of the week.

- **Weekday for Weekly Pledges**
  Select the day on which the pledging begins for the week.

> **Note:**
>
> *If you find that weekly pledges are showing 53 weeks instead of 52, change this to a different day. This usually occurs the year after a leap year.*

- **Mass Assign Default Email Field (from Membership Module)***
  The options in this dropdown box are based on the names of the email fields already set up in the **Membership** Module. If you would like to use a specific email field to **Email Donations Statements** *(pg 257)*, choose that field from this box. Then choose between having this setting applied to all Givers, or just the ones that have only Givers with no email selected. In order for this to work, you must **Setup Email** *(pg 276)* first.

  *Also editable on the 'Contacts' tab in '**Manage Givers** *(pg 133)*'

- **Insert City and State based on Zip (**Uses Internet Connection**)**
  If you would like Church Windows to expedite your data entry process by automatically populating the City and State fields for an address based on its Zip Code, check this box and then use the ◉ radio button select either:

  - **Only insert City and State when blank**
  - **Always insert City and State, overwriting any previous value**

  Remember, you must be connected to the internet in order for tool this to function.

- **Show Giver Middle Name**
  Place a ☑ checkmark in this box if you want to show the middle name for the Giver on screens and reports.

User Settings

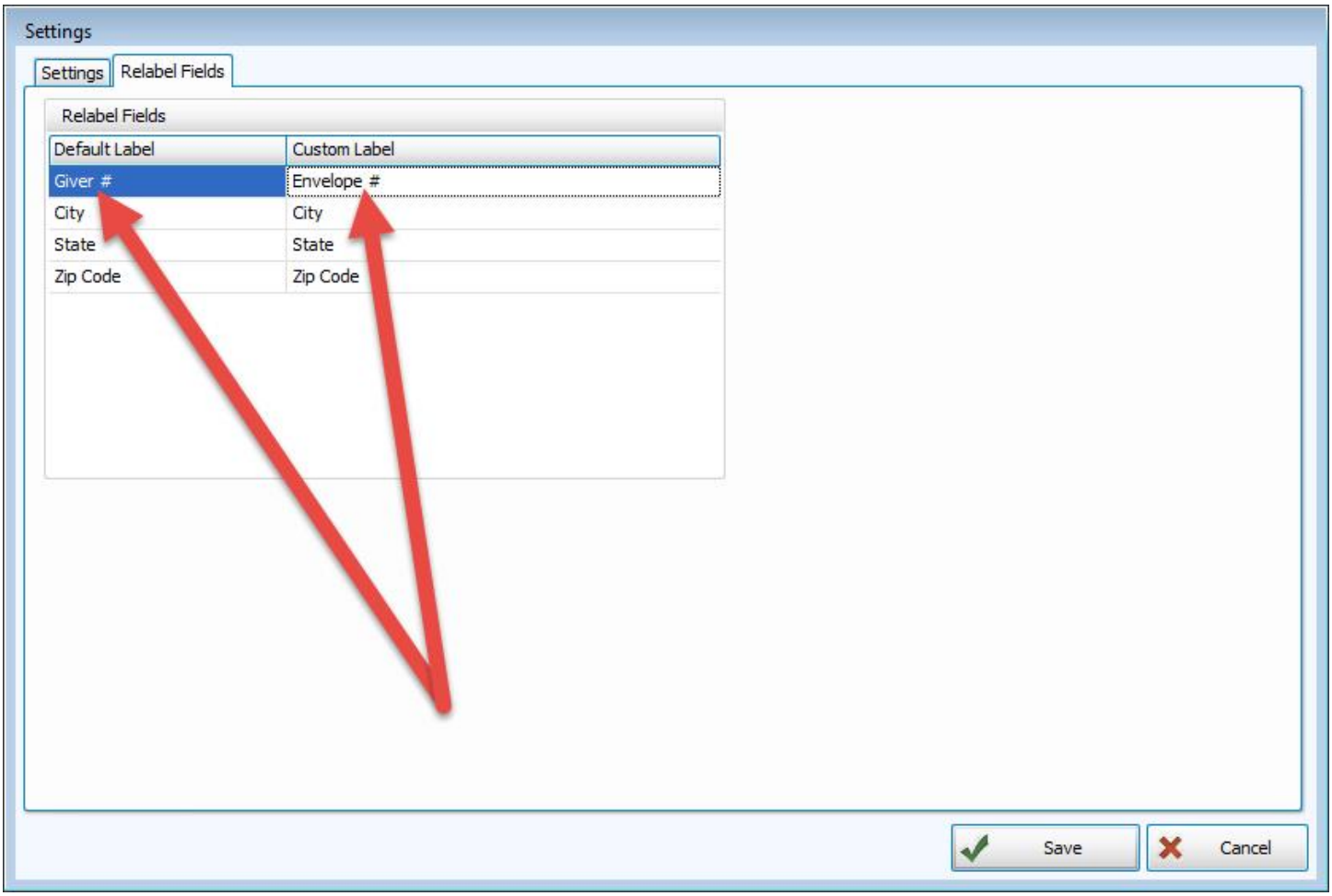
These settings on the right side of the screen are unique to each of the Users in your database

- **Always confirm and ask me about printing after posting donations**
  Check this box if you want Church Windows to automatically give you the option to print a report after your make a posting.
- **Never show/print inactive people by default (Except Statements)***
  This setting determines if **Donation Reports** *(pg 193)* will automatically include or exclude people that you have marked as deceased, left the area, etc. using Inactivate Records. However, **Donation Statements** *(pg 248)* will always include Inactive records by default.
- **Show Dashboard when Donations starts**
  Check this box if you would like the **Donations Dashboard** *(pg 306)* to open as soon as you open the Module.

If you are unable to see certain windows or need to reposition windows to view them more easily, click the button to **Reset all screens to default sizes and locations**.

Relabel Fields tab

Place a **Custom Label** next to the **Default Label** for any label in the list that you would like to change to something other than what shows as the default.



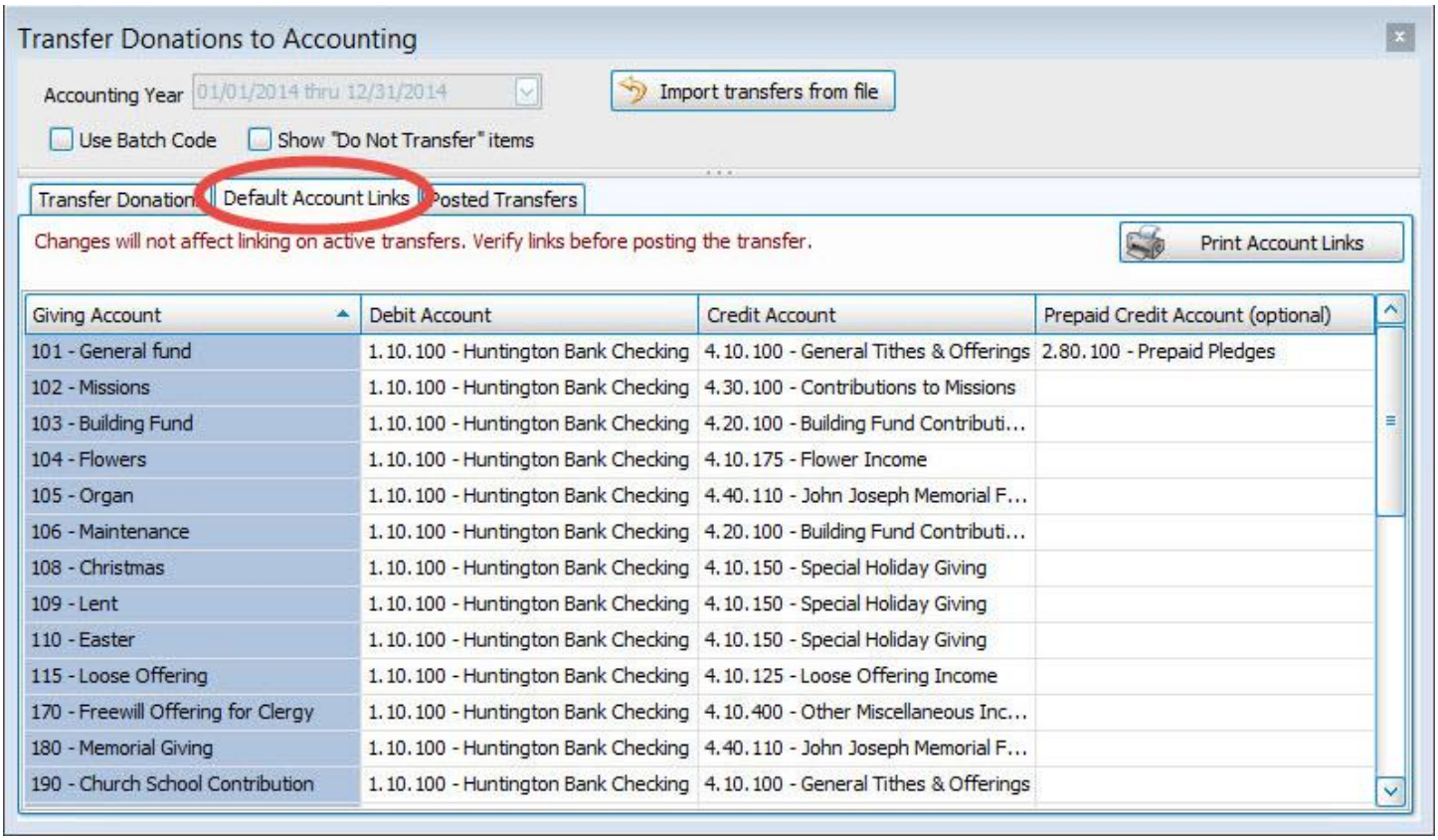
For example, you may prefer to refer to *Giver* numbers as *Envelope* numbers. This is where you would make that change so that throughout the program it says Envelope # instead of Giver #.

Link Donations to Accounting

A successful transfer from **Donations** to **Accounting** consists of two parts. First, you must post and transfer a batch using **Enter Donations** *(pg 29)*. Then, you must use the **Transfer Donations to Accounting** *(pg 66)* feature to successfully complete the transfer to Accounting.

The **Link Donations** button is found under the Special Functions menu of either **Donations** or **Accounting**. It opens to the **Transfer Donations to Accounting** *(pg 66)* screen where you can link the Giving Accounts of the **Donations**

Module to your Chart of Accounts in the Accounting Module:



Giving Account	Debit Account	Credit Account	Prepaid Credit Account (optional)
101 - General fund	1.10.100 - Huntington Bank Checking	4.10.100 - General Tithes & Offerings	2.80.100 - Prepaid Pledges
102 - Missions	1.10.100 - Huntington Bank Checking	4.30.100 - Contributions to Missions	
103 - Building Fund	1.10.100 - Huntington Bank Checking	4.20.100 - Building Fund Contributi...	
104 - Flowers	1.10.100 - Huntington Bank Checking	4.10.175 - Flower Income	
105 - Organ	1.10.100 - Huntington Bank Checking	4.40.110 - John Joseph Memorial F...	
106 - Maintenance	1.10.100 - Huntington Bank Checking	4.20.100 - Building Fund Contributi...	
108 - Christmas	1.10.100 - Huntington Bank Checking	4.10.150 - Special Holiday Giving	
109 - Lent	1.10.100 - Huntington Bank Checking	4.10.150 - Special Holiday Giving	
110 - Easter	1.10.100 - Huntington Bank Checking	4.10.150 - Special Holiday Giving	
115 - Loose Offering	1.10.100 - Huntington Bank Checking	4.10.125 - Loose Offering Income	
170 - Freewill Offering for Clergy	1.10.100 - Huntington Bank Checking	4.10.400 - Other Miscellaneous Inc...	
180 - Memorial Giving	1.10.100 - Huntington Bank Checking	4.40.110 - John Joseph Memorial F...	
190 - Church School Contribution	1.10.100 - Huntington Bank Checking	4.10.100 - General Tithes & Offerings	

When the screen appears, use the following columns on the **Default Account Links** tab to make the necessary adjustments:

- **Giving Account**
  Contains the account name and number as they are listed in **Donations**.

- **Debit Account**
  For each Giving Account, click this box to select the desired Debit Account in Accounting.

- **Credit Account**
  For each Giving Account, click this box to select the desired Credit Account in Accounting.

- **Prepaid Credit Account**
  As an additional option for any giving account you desire to link, you can also link to a Liability Account in **Accounting** that will serve as a prepaid credit account when a transfer is made from **Donations** to **Accounting**.

> **Note:**
>
> *If you would like to link accounts in a different **Accounting Year** , select the desired year from the **Accounting Year** box at the top of the screen.*

Print Account Links

To print or export a report that shows the current settings of the links, click the **Print Account Links** button. When the **Account Links Report Options** screen appears, make your selections from the following tabs:

Columns Tab

Determines the order and the appearance of the columns displayed.

Sort (or Group & Sort) Tab

Organizes the information into the desired order (and groupings).

Fonts Tab

Sets the style and size of the typeface used to display the contents of the report.

Once you have made all of your selections, click **Print** to view a Print Preview 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.

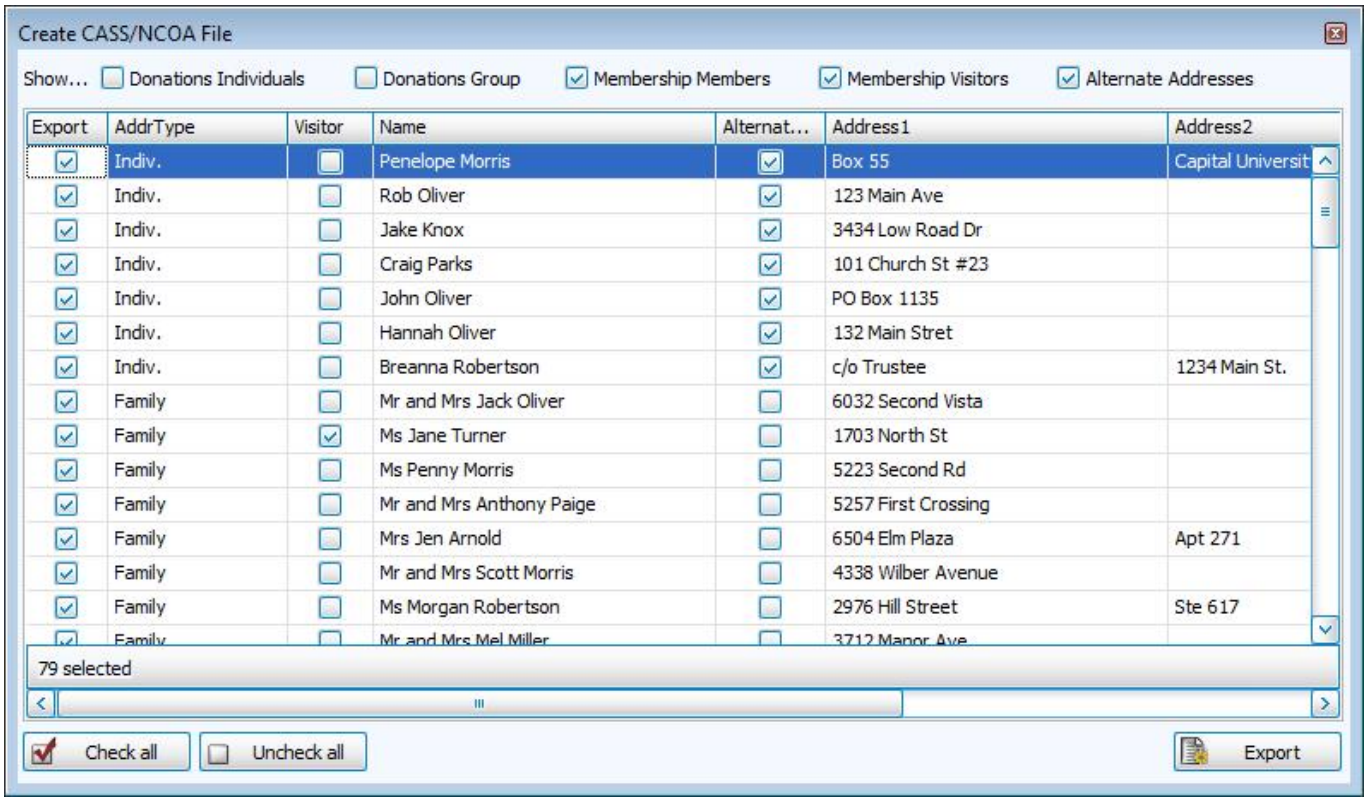
Create a CASS/NCOA file

If you are going to be Printing Labels with Barcodes, 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) 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 305)* *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, then open the program so that you are at The Initial Portal. 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.

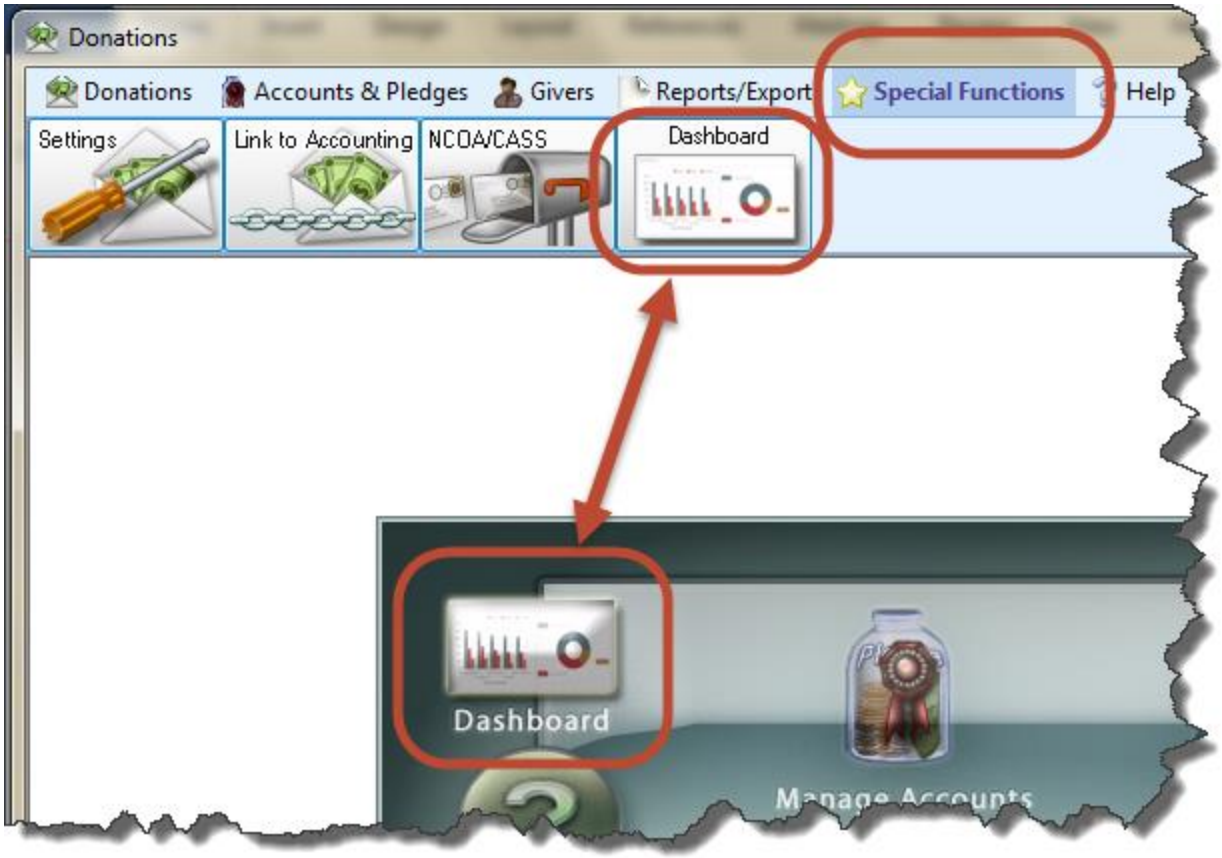
Donations Dashboard

Six types of graphs are available to view and/or print a visual comparison of various information about the **Pledges** *(pg 98)* and **Donations** recorded in your database. The available graphs are: **Campaign Thermometer, Pledge / Giving Thermometer, Giving Accounts Distribution, Steps Graph, Attendance vs Giving, and Account Weekly Balance**

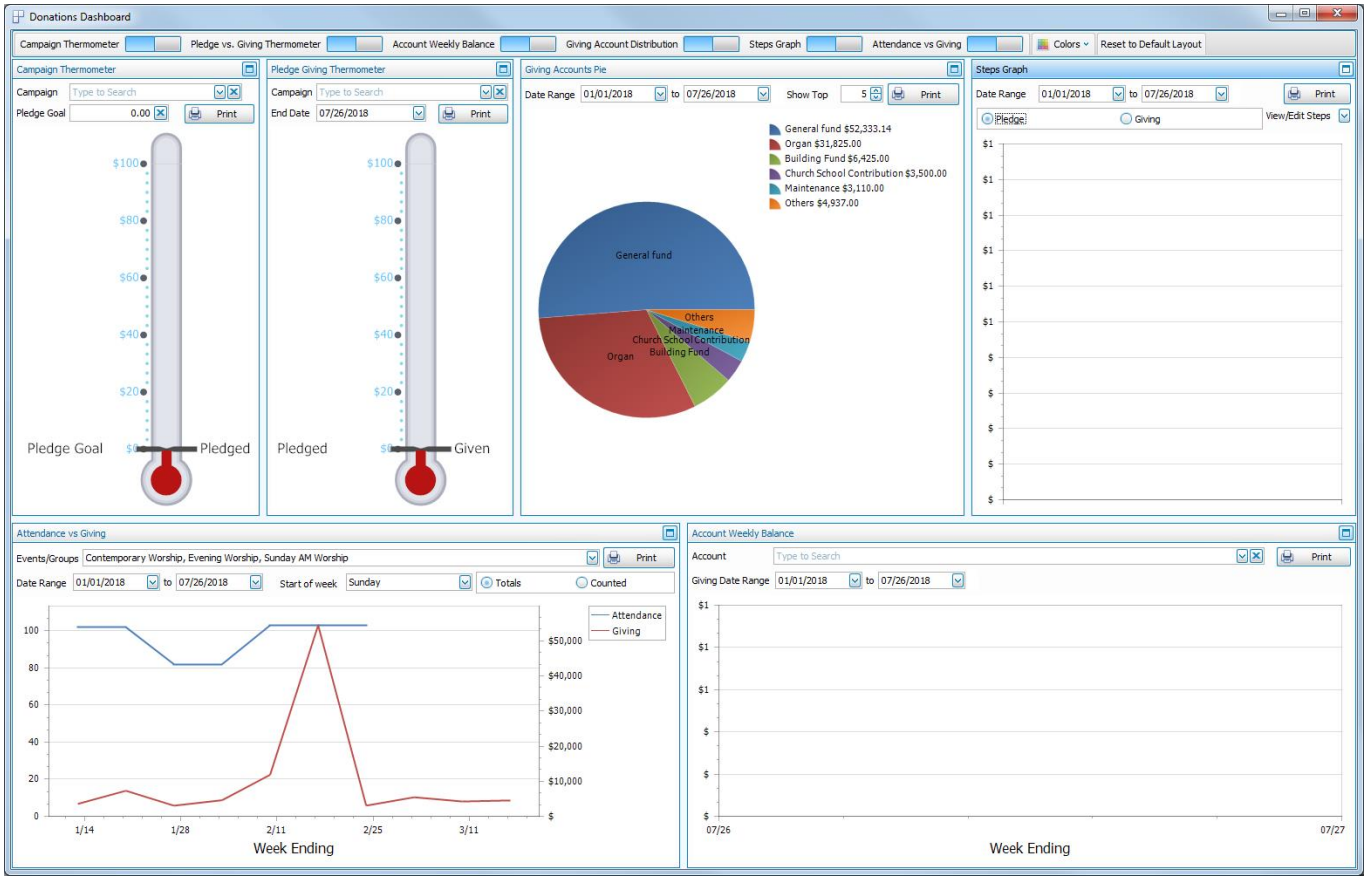
To access the Donations Dashboard screen:

1. From The Initial Portal of Church Windows choose **Donations**
2. Then, from the **Quick Access Buttons** in the center of the screen, choose **Donations Dashboard**

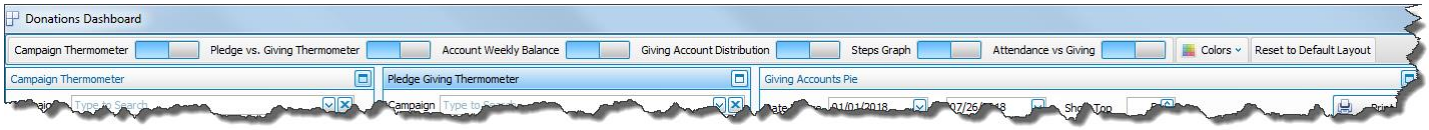
3. Or, in the **Button Bar** at the top of the screen choose **Special Functions** and then click **Donations Dashboard:**



4. The **Dashboard** will look like this:

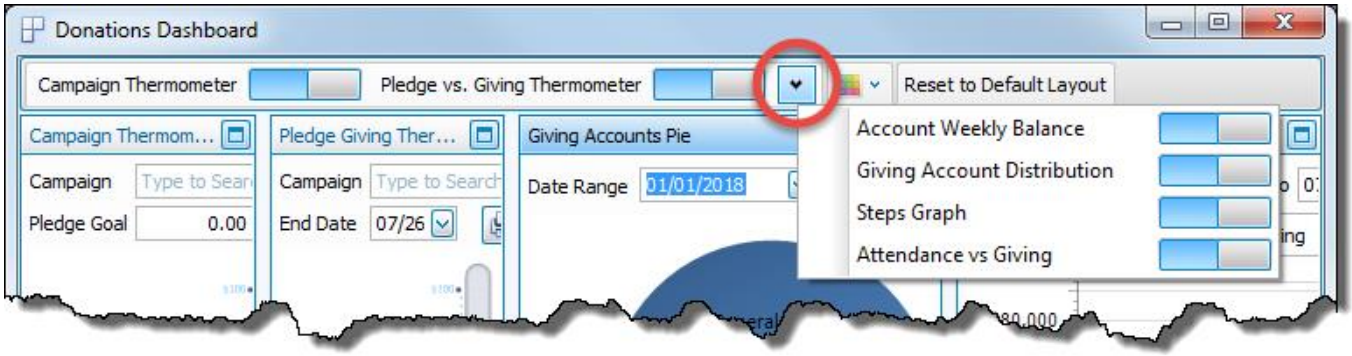


Across the top of the **Dashboard** window is a toolbar with several buttons:



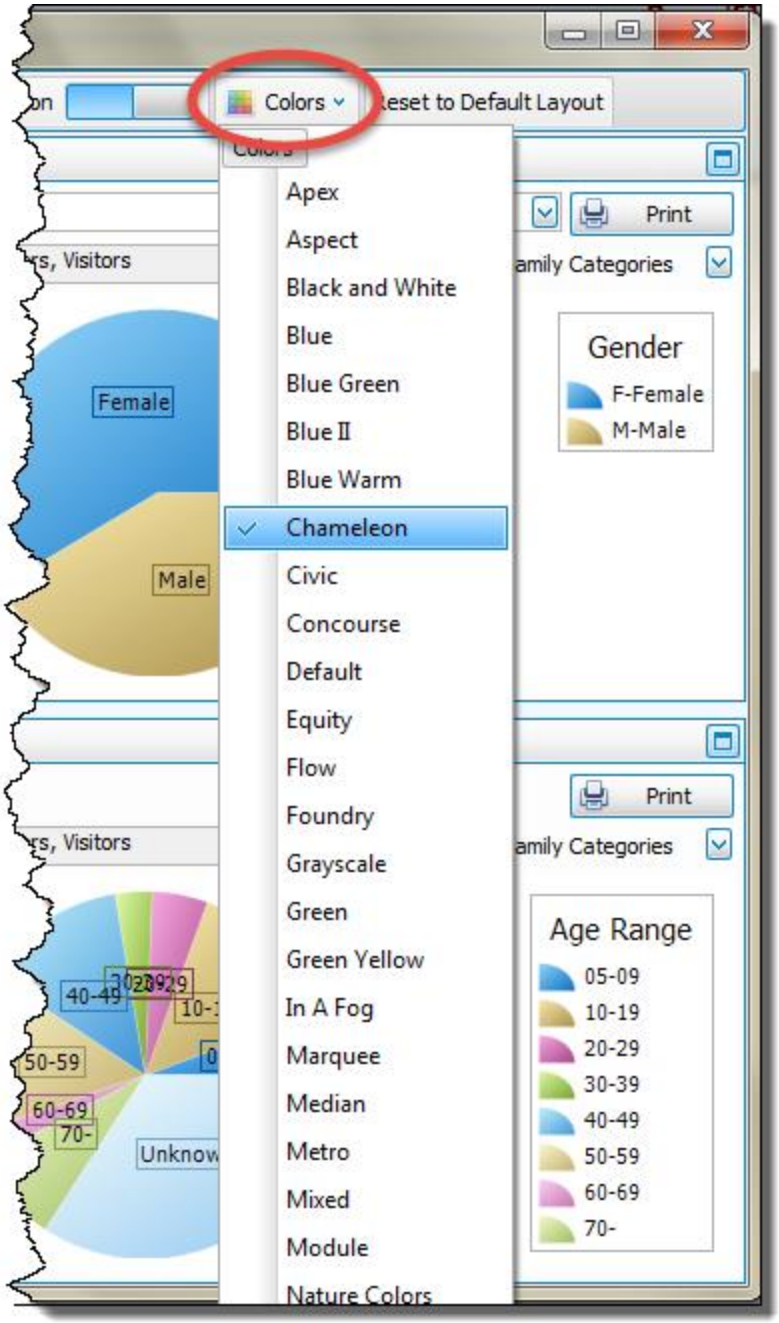
- **On / Off** switches for each of the graphs:

If you can't see all of the graph switches, there will be a small down arrow button to the right that you can click to reveal the rest of the switches:



- **Colors**

  A dropdown menu to select the color scheme applied to the graphs:



- **Reset to Default Layout**

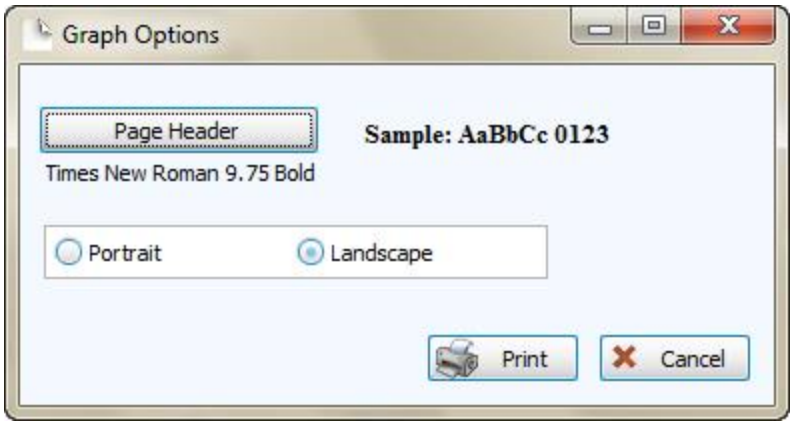
  Used to return the dashboard to its original setup after making one of the graphs full screen or turning some of the graphs off.

In the top right corner of each graph are two buttons:

- **Maximize** which will make that graph full screen.

  Or

- **Minimize** which will return the graph to its original size alongside the other graphs.
- Print click **Print** to view a Print Preview and then proceed in sending the graph to your printer. A window will open allowing you to change the font and the page orientation, if desired:



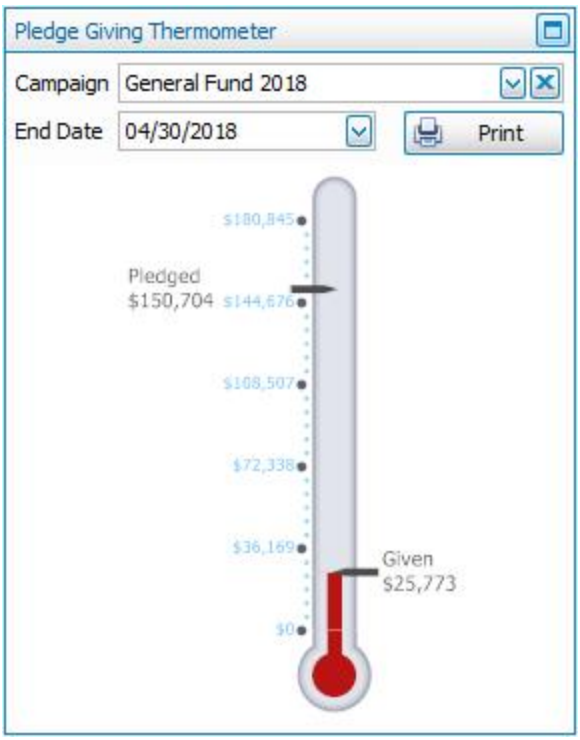
You can also Export graphs and/or Send via Email as a file to be opened outside of Church Windows.

Campaign Thermometer

This graph allows your to choose a **Campaign** and enter a **Goal** for how much you hope to raise in **Pledges** *(pg 98)* and then compare how close you are to that goal:

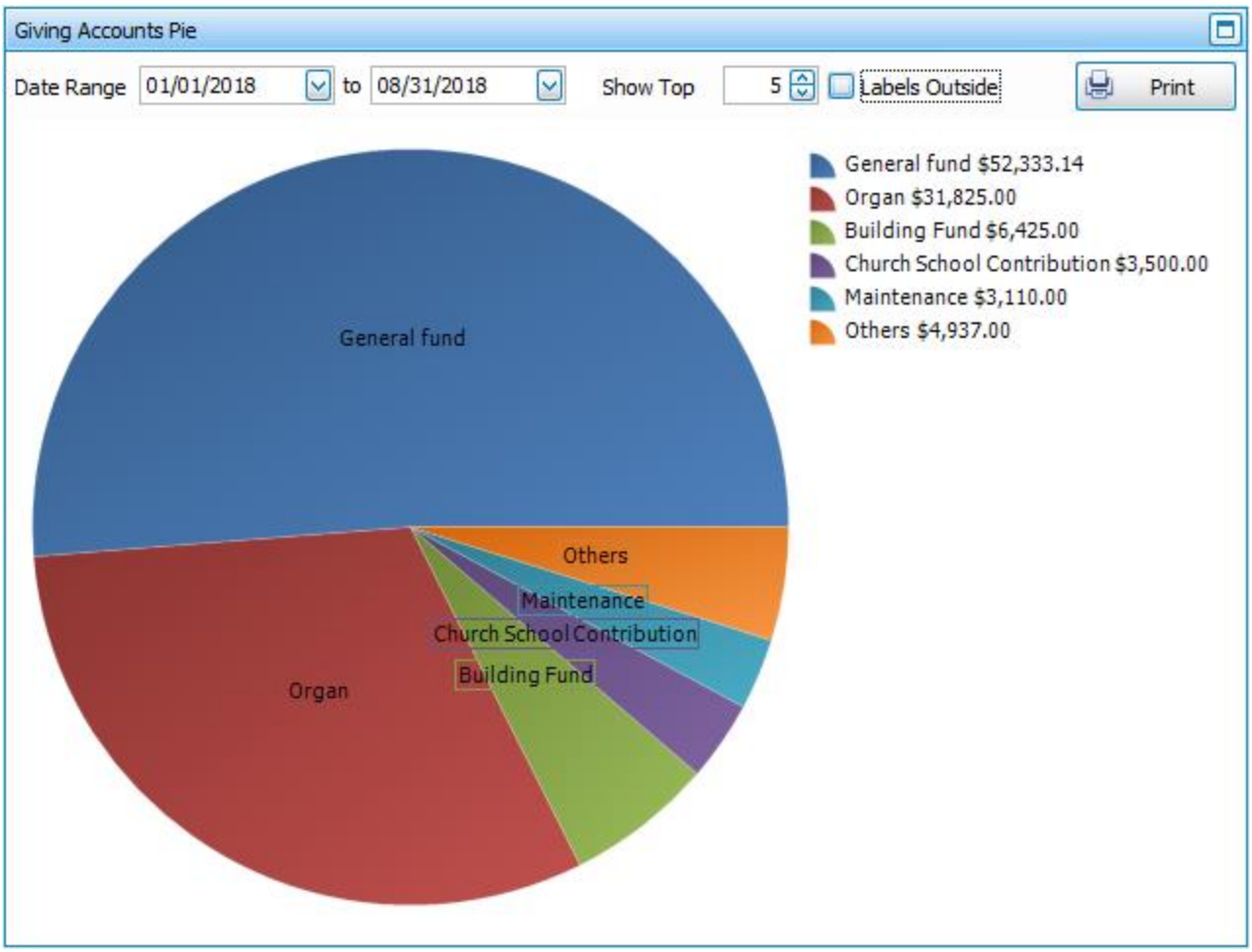
Pledge / Giving Thermometer

This graph allows you to compare how much you have received in donations towards you **Campaign Pledges** *(pg 100)*:

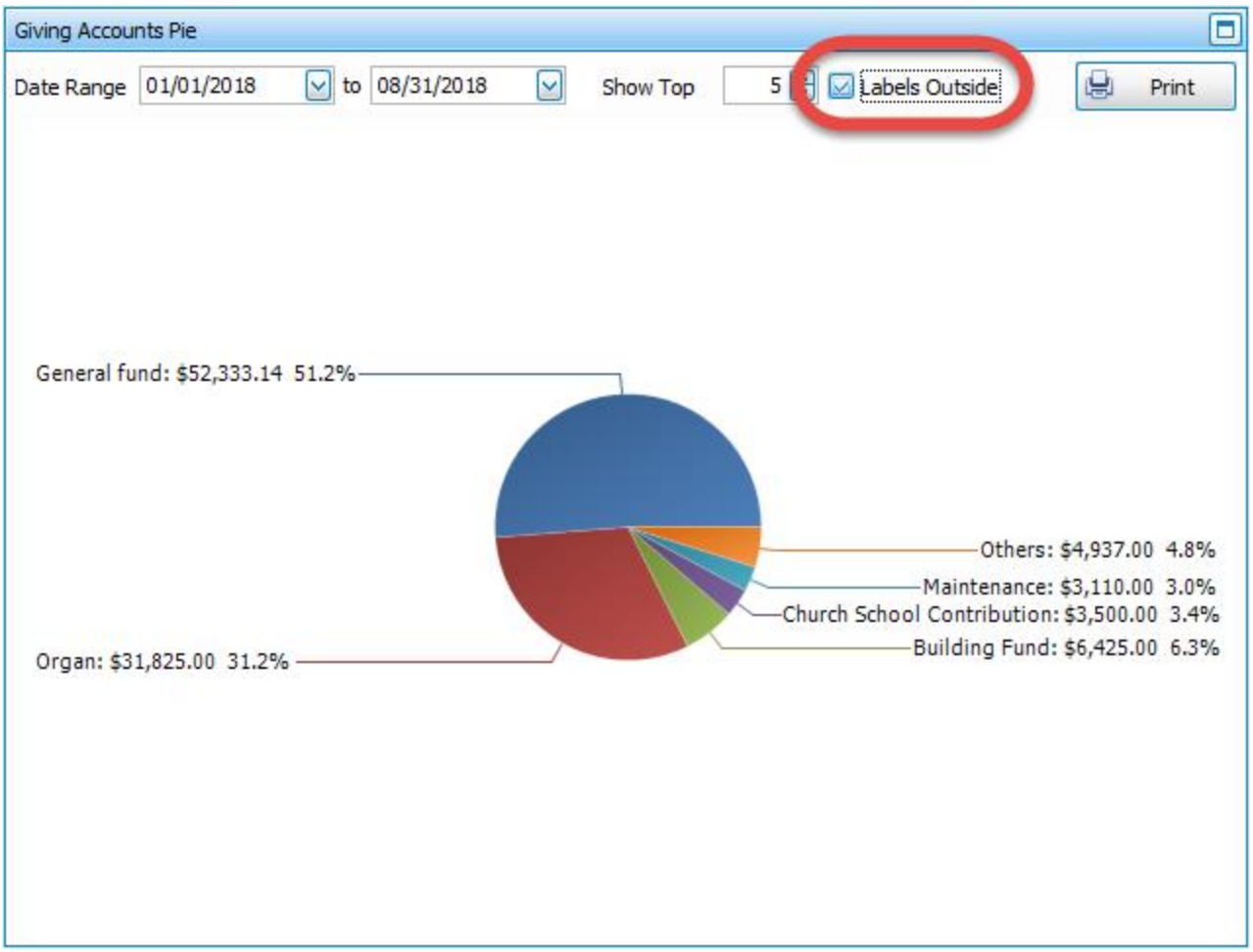


Giving Account Distribution

This pie graph shows the **Giving Distribution** *(pg 46)* of how much is donated to every account in the selected date range, or enter a number in the "**Show Top**" box to view only a certain number of accounts, such as the top 5:



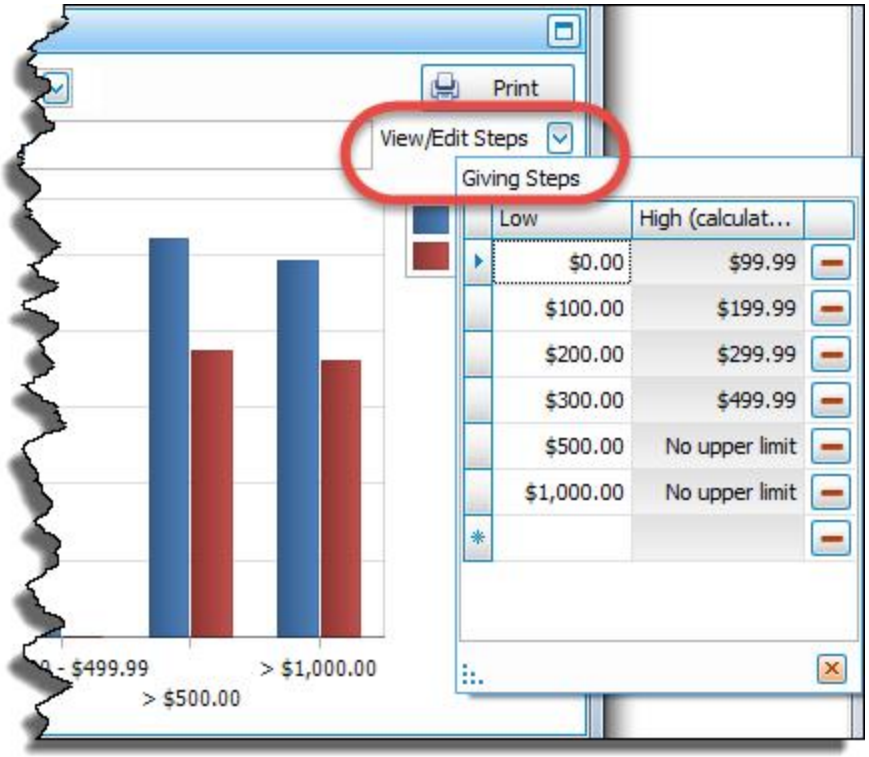
The labels for pie graphs can be displayed either on top of the graph, as pictured above; or displayed outside the graph, as pictured below, by putting a ☑ checkmark in the **Labels outside** box:



Steps Graph

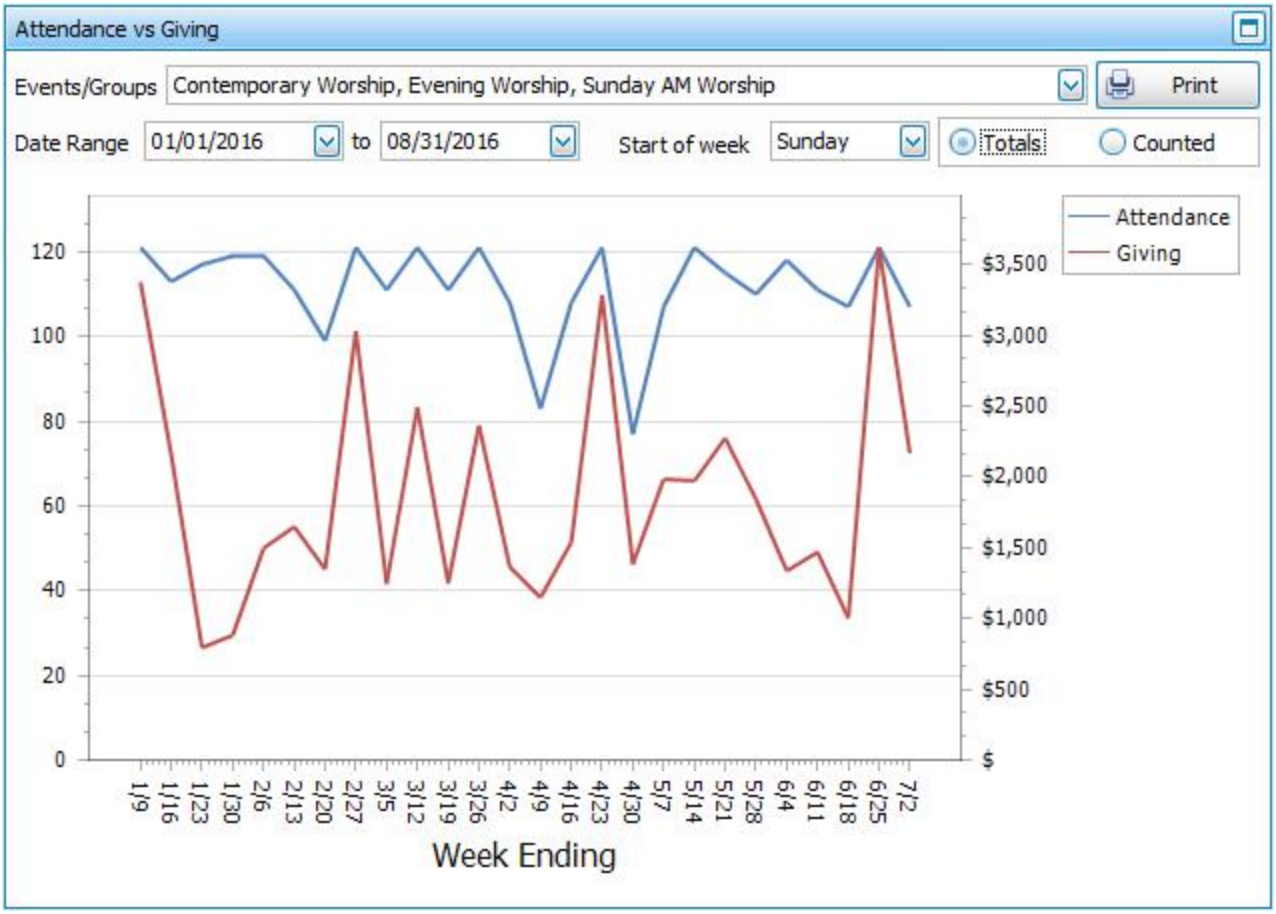
This graph is essentially a visual version of the **Step Report** *(pg 216)*. First, select a date range. Then choose between Pledges or Giving:

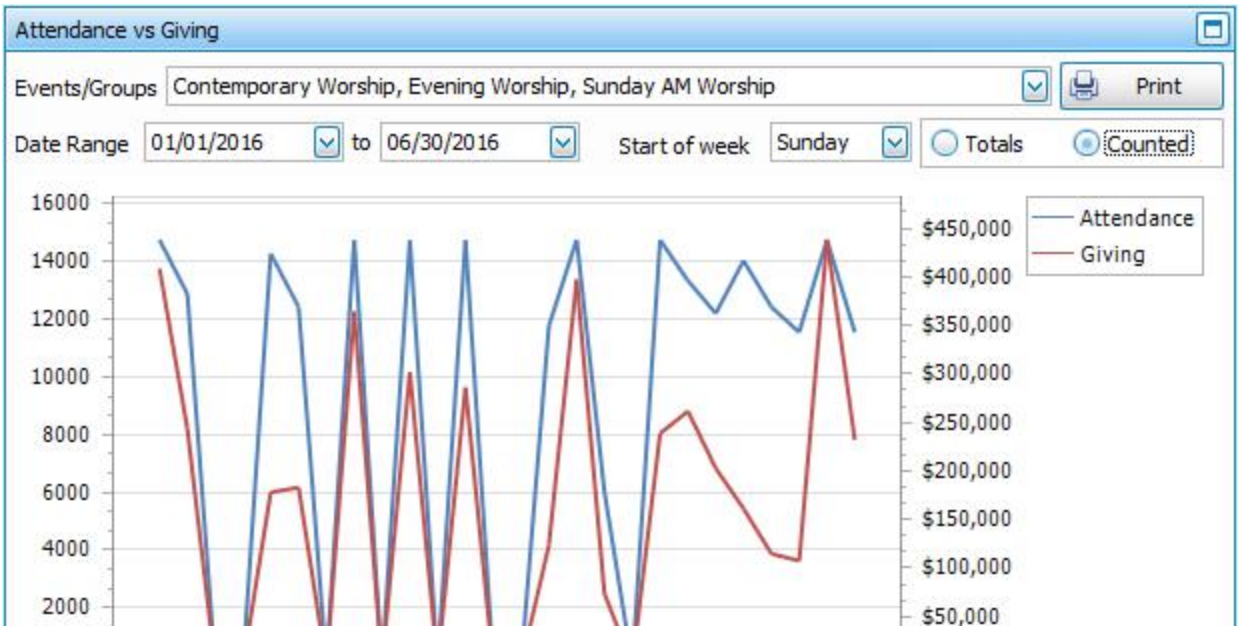
Click to **View/Edit Steps** if needed:



Attendance vs Giving

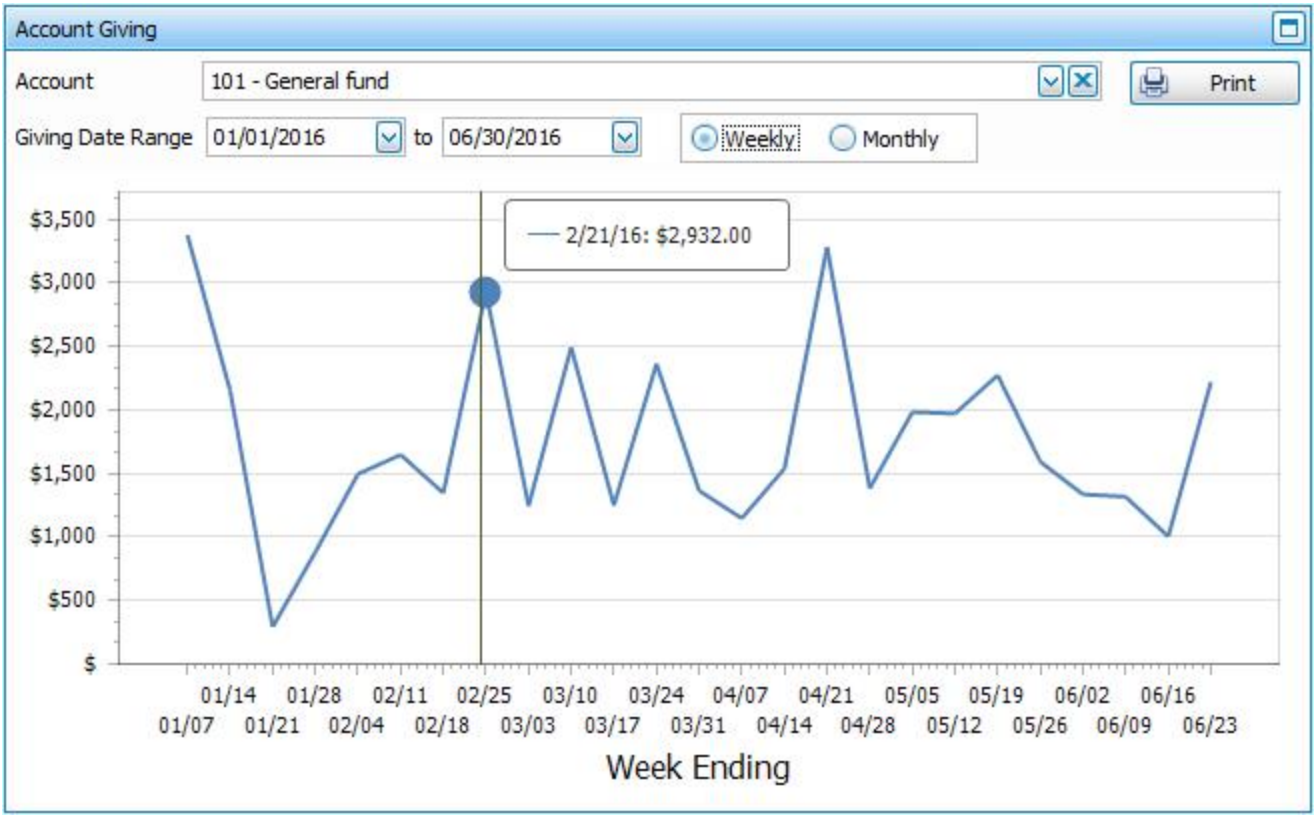
This graph allows you to compare the attendance of your various Events and/or Groups / Classes on a meeting-by-meeting basis, using either the **Total** number of people checked present or **Counted** from the number entered into the **Persons Present** box in Attendance Entry with the total number from **Enter Donations** *(pg 29)* each week in your selected date range:

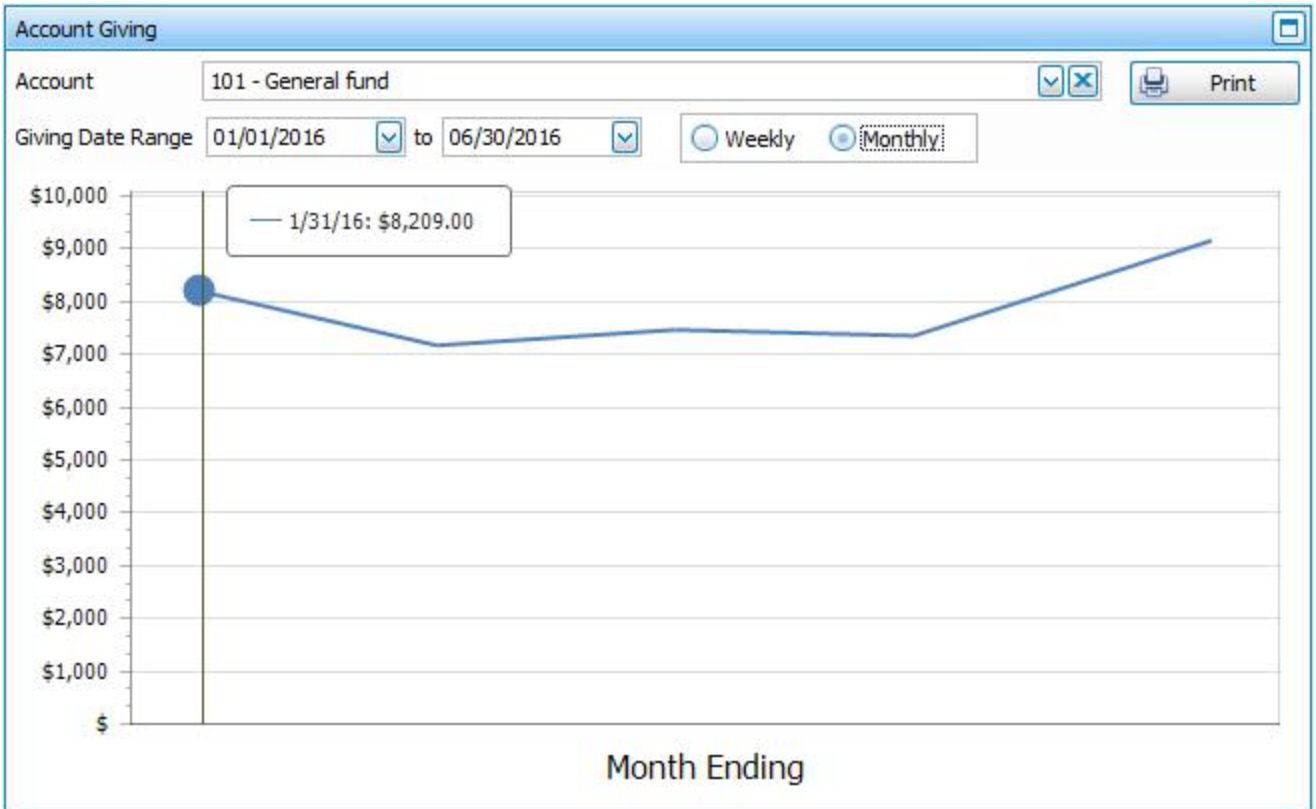




Account Giving

This line graph shows you how much is donated to the selected account on a **Weekly** basis or a **Monthly** basis for the selected date range. When you hove over a point on the line graph it will show the exact date and total:





Delete Historical

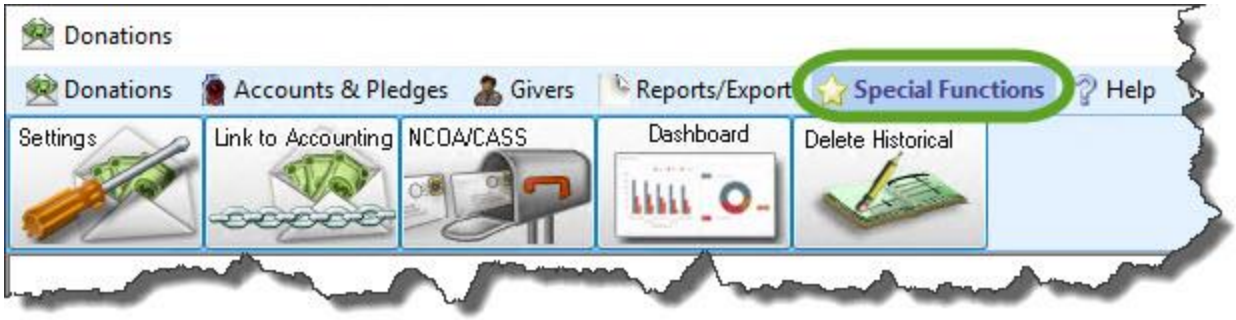
You can use the Delete Historical screen to PERMANENTLY remove out-of-date Donations data from Church Windows. For audit protection, the system will always keep the 5 most recent years of data. It is only possible to delete past data that is older than 5 years. This function only looks at calendar years (January through December), it cannot handle fiscal years.

Important!

We strongly recommend first Making a Backup of your Church Windows data before you Delete Historical data.

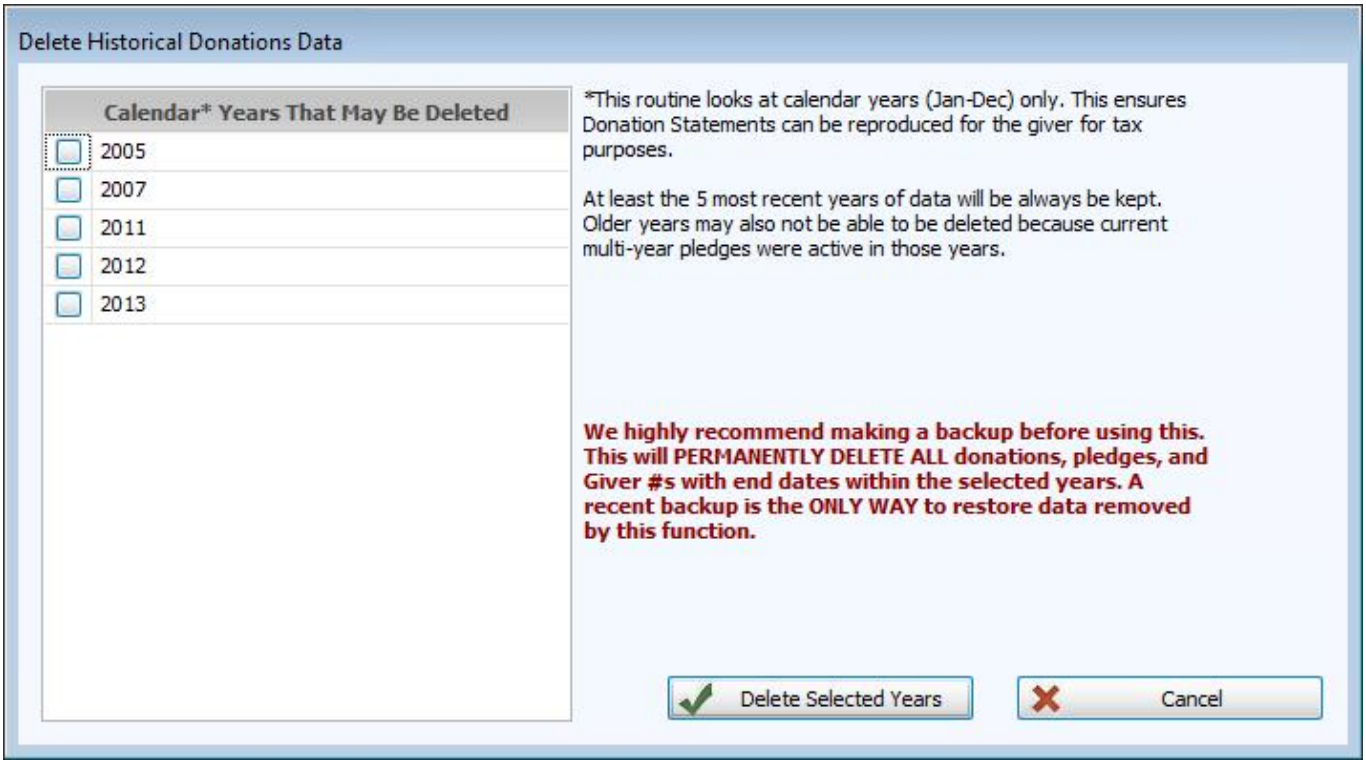
To access the Delete Historical screen:

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



2. Click the **Delete Historical** button.
3. Read all of the warnings before proceeding!

4. Place checkmarks next to the years you want to *permanently* delete from Church Windows:



Please understand that this will completely remove **all Giving and all Pledging data** for each person for the selected year(s) from Church Windows. Without first Making a Backup of your Church Windows data, there is no undoing this function if you later change your mind.

5. Then click the **Delete Selected** button in the bottom right, or click **Cancel** to discard selections without deleting anything.