

January Extended Hours: (Eastern)
Monday - Thursday 9 am - 8 pm
Friday - 9 am - 5 pm
Saturday - 10 am - 1 pm

Regular Hours: (Eastern)
Monday - Thursday 9 am - 6 pm
Friday - 9 am - 5 pm

Support & Office Closed:
Thanksgiving - November 28th & 29th
Christmas - December 24th & 25th
New Years Day - January 1st

PLEASE NOTE: We close at 5 pm ET the day before a holiday.

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

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

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

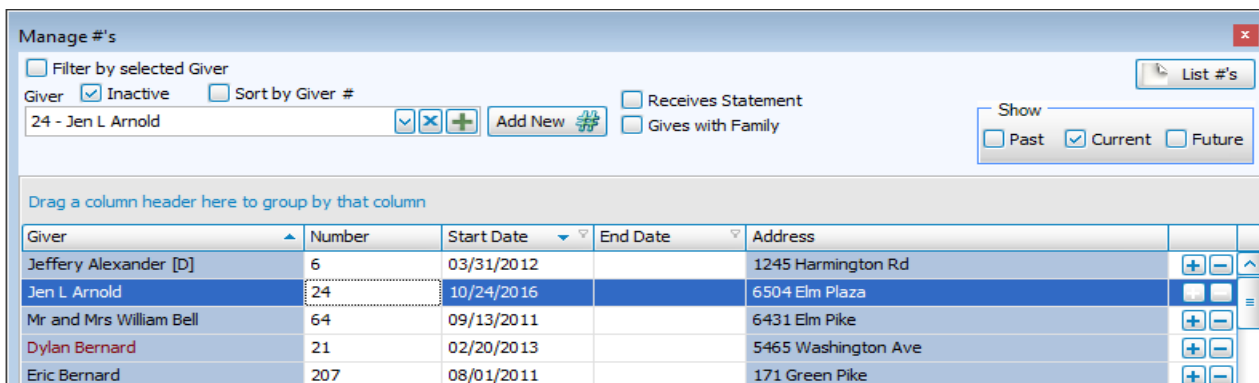
Before you make any changes to the Giver #s, make a Backup.

1. Stop the use of Giver #s

You can to stop the use of Giver #s for people not needing them (perhaps they passed away, moved away or left the church). Inactive persons appear in red and their Giver #s should be ended. Use the *Manage #s* function to accomplish this. If there are multiple people who do not need Giver #s or if your church has decided not to use Giver #s, *Auto Assign* may be the best option. (*Auto Assign* instructions are on Page 2)

- Go to *Donations>Givers>Manage #s*.
- Find the giver who does not need a Giver # and fill in their End Date.
- Do this for each person who does NOT need a Giver # after the entered date.

NOTE: Ending Giver #s for those who will not be assigned a number in the next year is VERY important when using the *Auto Assign #* function. Inactive persons' Giver #s should be given an End Date.



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

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

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

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

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

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

End Giver #s for everyone who will not have a new number assigned.

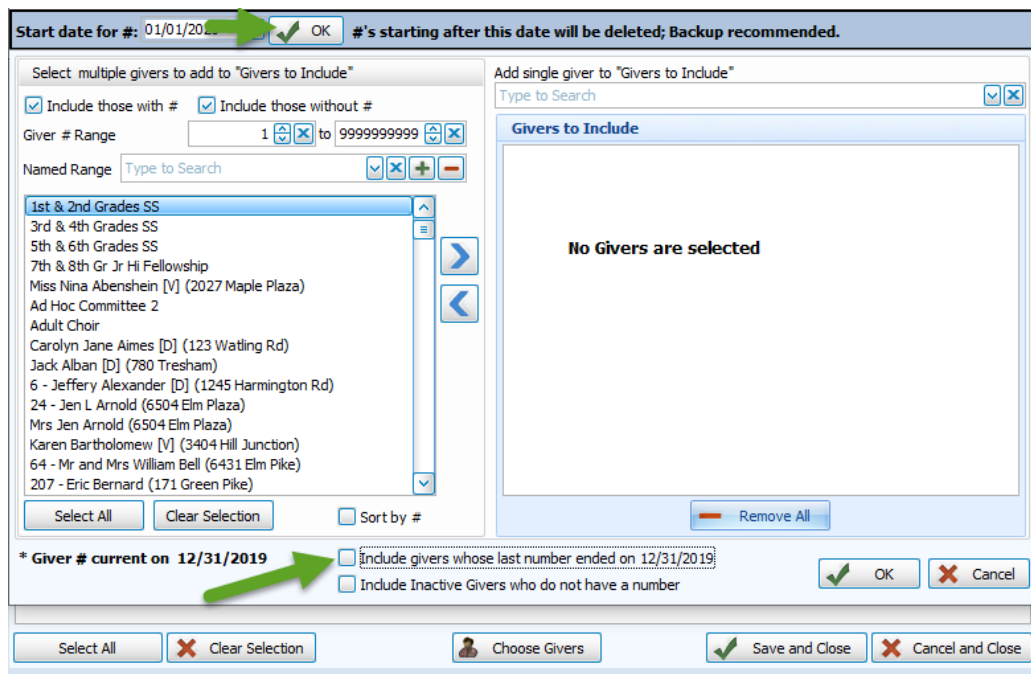
The *Auto Assign #* function is best used when you want to change the Giver #s for a lot of people as of a certain date. Rather than assigning the numbers one by one on the *Manage #s* screen, you can change the numbers for a lot of people all at once.

- Click *Givers>Auto Assign #*
- The box to the right appears. Click *OK*.
- *Start date for #* (perhaps first of the new year), click *OK*.
- Uncheck *Include givers whose last number ended on 12/31/2019*.
- Looking at the right side of the screen, you see that No Givers are selected when this screen opens.

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

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

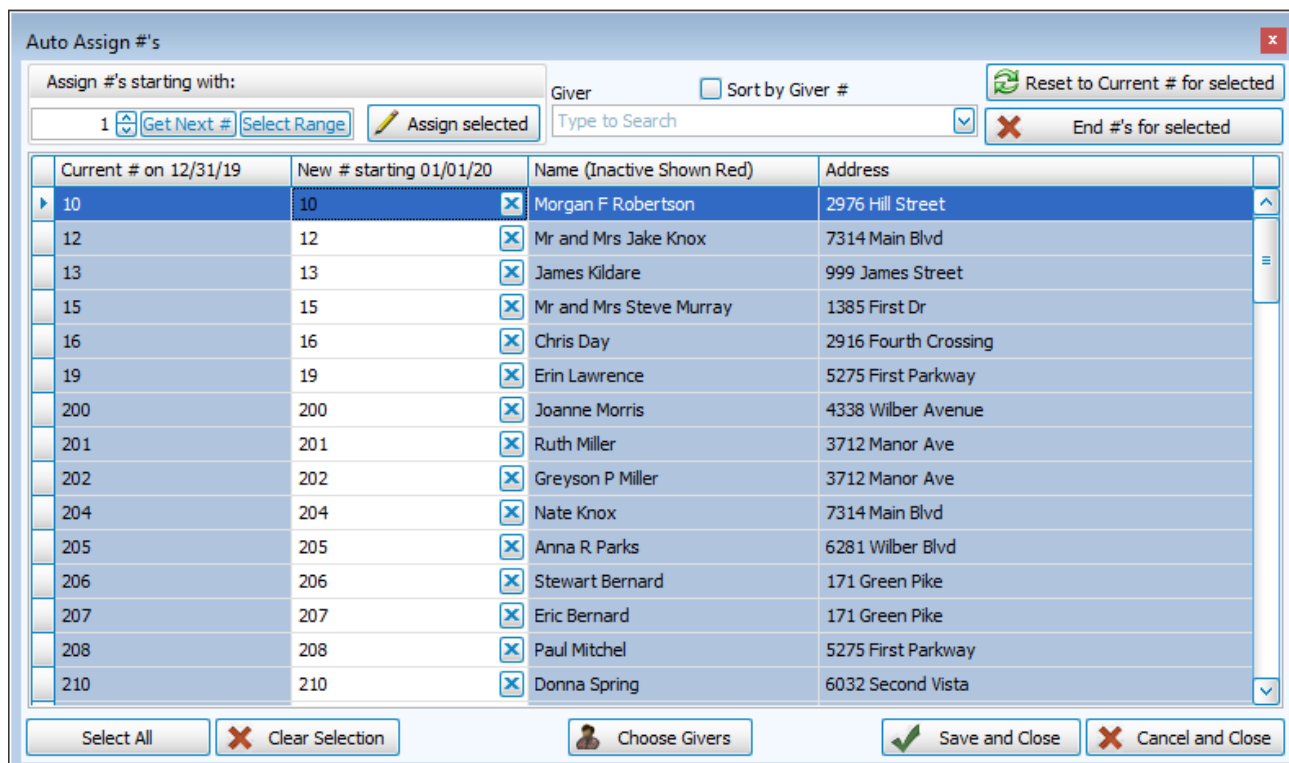
OK



The list of givers on the left, defaults to including both those with a Giver # and those without a Giver # . All givers are listed and there are multiple ways to select the givers.

- ◊ **Select Givers with #** - With only this box selected, we see in the list of givers box only those givers who currently have a Giver # assigned to them.
- ◊ **Select Givers without #** - With only this box checked, we see only those givers who do not currently have a Giver # assigned to them.

- ◇ **Giver # Range** – With this option you can limit the list of givers to just those in a certain Giver # range. This is especially effective for those churches using different series of giver #s to indicate different types of givers (Example: Members vs. Visitors).
 - ◇ **Named Range** – With this option you can select those givers that have been set up in a named range. You may limit the screen to one or more of those ranges. A church might have a named range for Visitors or for Children.
 - ◇ **Select All** – If you have limited the list to just those you want or if you want to reassign everyone’s Giver # for the current year, click *Select All*. Click the right-facing arrow to send the names over to the *Givers to Include* box.
 - ◇ **Sort by #** - If you want to view the givers in Giver # order, look at the bottom of the screen and click to place a check mark in the *Sort by #* box. Those with Giver #s are listed first in numerical order; those without Giver #s are then listed.
 - ◇ **Include givers whose last number ended on 12/31/20XX** - typically unchecked.
 - ◇ **Include Inactive Givers who do not have a number** - typically unchecked.
- Once you have made your selections, use the right-facing arrow in the center of the screen to move givers to *Givers to Include* (only those on the *Givers to Include* list will be changed). Click *OK* at the bottom screen.
 - The Auto Assign #s screen will open

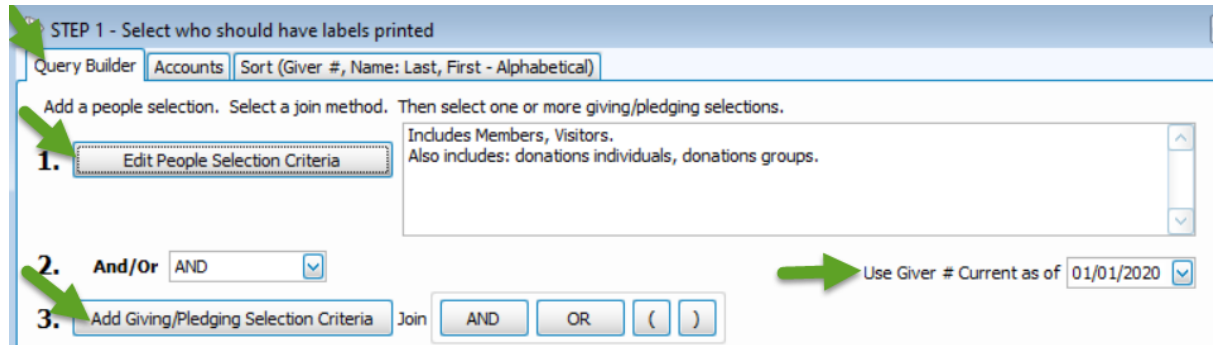


- The *Assign #s starting with* box defaults to 1 (one), but you may start with any number you wish by clicking box and changing the number.
- Set the order for your reassigned givers.
 - ◇ To list the names in Current Giver # order, click on the column heading *Current #*.
 - ◇ To list the names in alphabetical order, click on the column heading *Giver Name*.
- Once the list is in the preferred order and if everyone is to be reassigned a number, click *Select All* at the left bottom of the screen.
 - ◇ If you wish to reassign numbers to only selected givers from this list, you can click on the first name and then, hold down the *CTRL* key on the keyboard, click to *unassign* names.

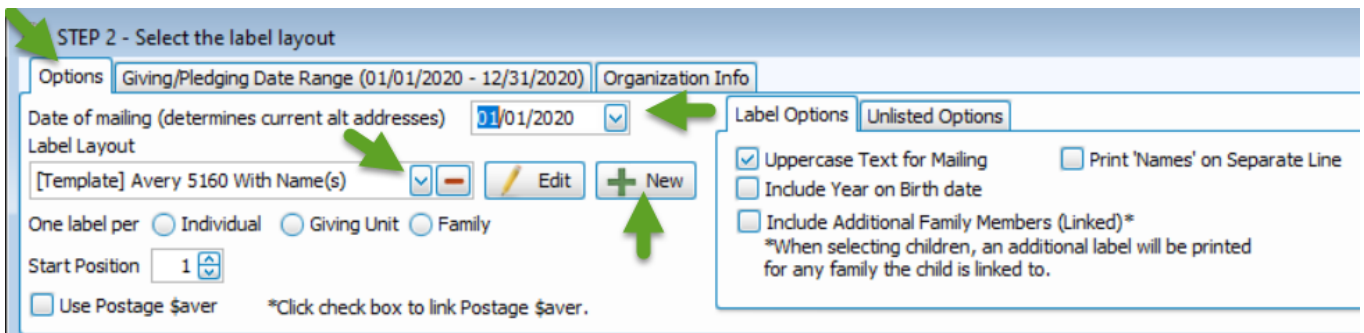
- Click *Assign Selected*. The numbers are now assigned in the sequence you selected and will appear in the second column 'New # Starting...'
- To unselect the givers, click *Clear Selection*.
- If the numbers for this group of donors are as you want, click *Save and Close* in the lower right corner of the screen. If you wish to cancel the operation and close the screen, click *Cancel and Close*.

Create Labels with Giver #s

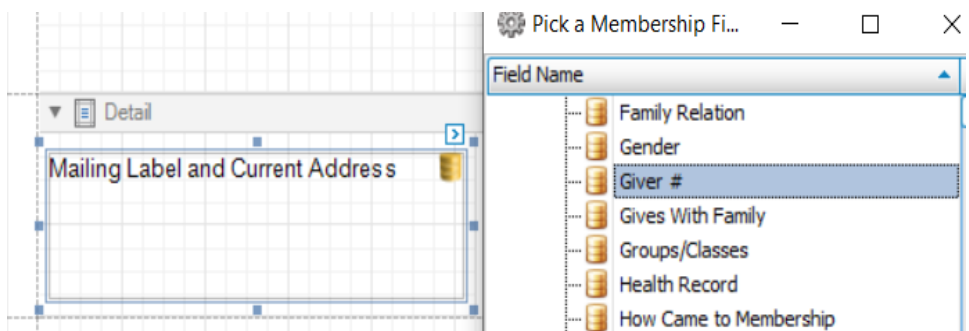
- *Donations> Report/Export> Lists & Labels> Labels>Step 1*



- On the *Query Builder* tab, if you are creating labels for the new year 'Use #s current as of' and enter the Start Date of new Giver #s. Click 1. *Edit People Selection Criteria* tab, uncheck *Include those without #* and you may fill in *Giver # Range*. Click *OK*.
- On 2. *And/Or*, choose *AND*.
- On 3. *Add Giving/Pledging Selection Criteria* tab, choose *Giving - Include All AND Pledging - Include All*. Change the *Date Range* to *01/01/2020 to 12/31/2020*. Click *Add*.
- On the *Sort* tab, sort by *Giver #* or *Name*. Click *Next*.
- On the *Options* Tab, change the *Date of Mailing* to *01/01/2020* because of the *Alt Addresses*. A *New* label may need created to include a *Giver #* or choose that existing label from the drop down list.
 - ◊ To create a *New Label*, click *New* and choose the *Label Product* and *Product Number*, click *Finish*.

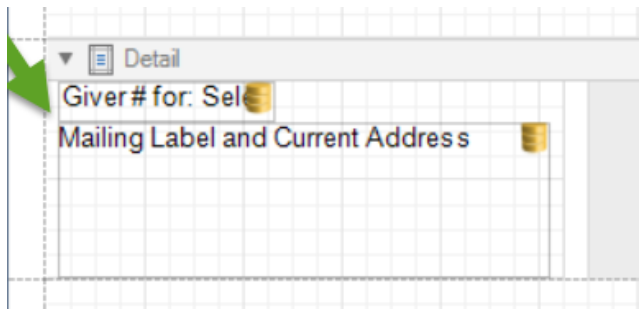


- ◊ On the *Report Designer*, format the label to include the *Giver #*, by double clicking on *Membership Field* on the right side of the screen. The *Pick a Membership Field* screen opens, scroll down to *Giver #* and double click on it. *Giver #* will be placed at the top of the *Mailing Label and Current Address* Label and



may turn it pink, adjust the label by clicking on the *Mailing Label and Current Address* box, then using the down arrow on the key board to move it down (the pink will disappear).

- ◇ Align the fields.



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

Starting a New Campaign

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

1. Copy a campaign

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

2. Start a new campaign

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

Handling PrePaid Pledges

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

In Donations

You do not need a special donations giving account for prepaid gifts. When you set up a campaign or pledge, for the new year, the system knows that money coming into that pledge prior to the start of it will be considered *Prepaid money*. That money will show on the Giving Statement as **Prior Giving**. As an example: if someone pledges \$2000 to the new year campaign and prepays \$500 in the previous calendar year, the system will know that as of the start of the campaign, the person has *pledged \$2000, prepaid \$500 and still owes \$1500*. The system also knows that money coming into that account after the start of the pledge is regular income and goes into the #4 income account you selected.

In Accounting

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

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

In Donations

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