Church Windows Tech Tips

April Tech Tip

Contributions – Did You Know?

1) There's a very specific way to handle contributions that come to the church from the estate of someone. Create a new person in the household called First Name: Estate of xxxx, Last Name: xxxx. Assign that 'Estate of' person an envelope number DIFFERENT than the one the person had been using. Click to place a check mark in the Use Individual Name box. Assign the contribution that comes from the estate to the new number. Run two giving statements: one for the deceased person for the year and one for the 'Estate of' person. Send the estate both statements. IRS regulations do not allow you to transfer the deceased person's envelope number to the Estate; the gifts are technically from two different people and should be kept separate.

2) You can change the date on a contribution batch in three different places without deleting and re-entering the batch.

   (A) On the **Show Batch** screen, you can click the **Correct Date** button and key in the correct date.

   (B) When you click **Post** to post the batch, the screen gives you the date to confirm. You can key in the correct date there.

   (C) After posting to the Contribution module, you can go to **Contribution**, **Correct Batch Date After Posting** and key in the correct date. The two dates – the incorrect one and the correct one - will be available to transfer to Financial. If you transferred the first batch to Financial, you will post both dates: the incorrect one will reverse the entries posted on that day and the correct one will send the contributions over as they should be. If you did not transfer the batch, then delete the incorrect date and transfer the correct one.

3) When transferring contributions to Financial, there's a very helpful report available on the **Post Contributions to Financial** screen. Click the down arrow to select a contribution date. Click **Print** to see the report. It prints both the giving account in Contribution that the money was posted to and the income/expense/liability account the money will be transferred into in Financial. It also gives the date of the posting, the total amount posted to the Contribution giving accounts, the total amount to be transferred to Financial and the number of items being transferred. Great report!

4) If you begin a pledge campaign in the middle of your contribution year and people will be giving money to it prior to the actual start date of the pledge, you should create two accounts: (A) the actual pledge giving account, (B) a giving account called Prepaid XXX (with XXX representing the name of the pledge account). Monies given prior to the start of the pledge will be credited to the Prepaid XXX account and entered as a Prepaid on the Enter/Edit Pledge screen. Monies given after the start of the pledge will go to the regular giving account for the pledge.

5) If a person you have terminated in the database makes a donation, the donation may be entered in one of two ways.

   (A) In **Membership**, perform a **Find** on **Reason for Termination**, go to the person's **Household and Individual Record** screen and REMOVE the **Reason for Termination** code. Now you may enter the contribution along with everyone else's for that date on the **Enter Contribution** screen. You will have to remember to go back to the **Household and Individual Record** and re-terminate the person.

   (B) Go to **Contribution**, **Browse/Edit Contributions** and click **Add**. Here a contribution for a terminated person may be entered without un-terminating him/her. To get a report of the total contributions/deposit for the day, run a **Log Report** limited to the date, as contributions posted through **Browse/Edit Contributions** will not be on the **Batch** report.

6) If your church uses numbered envelopes, but some people don't want them, assign a different series of envelope numbers to those who do not want the envelopes. When it is time to send the list of names to the envelope company to order the actual envelopes, you can call up just the series of numbers for those wanting envelopes. Only those people will be on the list.

Don't forget:

1) Watch for **Church Windows 2006** after Easter.

2) To be up-to-date in Church Windows, you should be on the following versions: **Church Windows 2005 SR-3** and **Payroll 2006 SR-1**. These updates are available for downloading from the Church Windows website. Go to www.churchwindows.com, click Downloads, and click on either Church Windows or Church Windows Payroll.

3) Information on the 2006 Training Schedule is now available on the Church Windows website. Go to www.churchwindows.com and click Training. You can click on any of the various methods of training we offer: Regional classes, Hands-On Training, Individual Customer Training, On-Site Training, Desktop Streaming, Training Workbooks and Video Training. Find the type of training that fits your training needs, your learning style and your pocketbook!

4) When you call Church Windows for support, please have your customer number handy so we can assist you more efficiently.