ADVENTIST GIVING

CHURCH TREASURER TIPS

IF YOUR CHURCH HAS BEEN USING ADVENTIST GIVING FOR SOME TIME, PLEASE CONTINUE READING

We are in the process of setting up many new churches on Adventist Giving, but it occurred to me that some of you have become treasurers for churches that already had Adventist Giving set up, and your donation account list might need updating or editing. If it was set up a long time ago, there might be accounts that need to be de-activated or new accounts that need to be added. So here are instructions on how to do that.

1) Log In to your church's Treasurer Portal.

2) Click on "Manage Offering Categories"

3) Review the choices.
   a. Are they still relevant? Are they being used?
   b. Are the top 10 "featured" the most popular accounts?
   c. Are there new options that should be added?
   d. Are there old projects/categories that should be deactivated?
   e. Would you like to change the order that they appear on the envelope?
   f. Do all your options have a "Local Code" entered? (this should be the same as the Jewel local account code)

Write down any changes you would like to make. Look up the Jewel account codes if they are missing so you can add them. (Go to Maintenance/Edit Accounts in Jewel) Write down any new accounts you wish to add, along with their account codes. (These should be existing Jewel accounts)

Note the column called "Active." If the circle is black, this category shows up on your electronic tithe envelope. If the circle is white, that category is hidden and does not show up on your envelope.

Note the column called "Featured." If the circle is black, this category is one of the 10 donation options that are "featured" on the front of the electronic tithe envelope that your donors see. If you have more than 10 donation accounts entered, the rest will appear on the second page of the tithe envelope and donors can find them by clicking "*More offering categories*" under the local offering section of your tithe envelope.

Use these instructions for adding NEW DONATION ACCOUNTS.

1) Click on Add category (back in Adventist Giving)
2) Enter Category Name. Example: Church Budget or Building Fund. Whatever it is called in Jewel is usually fine.
3) Enter Local Code number. The one that you found in Jewel and wrote down before you started.
4) Add a Description if you wish so your members will better understand the category.
5) Click on Save Category. You will see the category listed at the end of your list.
6) Continue adding until you have added all of the local accounts that you have previously chosen and written down.
7) Click on Commit Changes to fully save the new accounts. If you fail to take this step, all of the new accounts will disappear, and you will have to enter them all over again.

Use these instructions for EDITING/INACTIVATING existing donation accounts.

1) Find the category you want Delete or Inactivate:

2) To delete, click on the X if it is available to delete a category. When the X is not available it is because you have already received donations under this category, and you cannot delete it. You can, however, inactivate it.

3) To Inactivate, click on the round button in the Active column so it is white. This inactivates the category and members will not be able to see it.

4) Click on Commit Changes to save.

Use these instructions for FEATURING/UN-FEATURING existing donation accounts. You can only have 10 featured accounts, so pick the most active.

1) Find the category you want to Feature or Un-Feature:

2) To Feature click on the radio button in the Featured column so that it is black

3)To Un-Feature a category, click on the radio button in the Featured column so that it is white.

4) Click on Commit Changes to save.

Once you have entered your chosen accounts and saved all the changes, you can also drag and drop to change the order in your list if you wish. Move them around and then click again on Commit Changes to save the new order.

Once you have finished, it is a good idea to go view the envelope as a donor to make sure that the envelope looks the way you want it to. One easy way is to Log Out (upper right corner) and then go to www.adventistgiving.org. Enter the name of your church and choose the correct name and address when it pops up. The envelope that you have created will be there for you to examine.

As always, if you have any problems with the setup, contact me.

The Ancient Treasurer's Blessing has a line that I think can be adapted to this situation. "May your donors give willingly and gladly through all seasons and circumstances, and may you make it as easy for them as possible."

Thank you for doing this, and stay safe out there!