



Happy 2016!!!

January extended hours - EST

9am – 8pm Mon – Thurs

9am – 5pm Fri

10am – 1pm Sat

[New Year Prep & Help page](#)

[Donations – New Year Steps movie](#)

[Accounting – New Year Steps movie](#)

[Short EOY Steps for all modules document](#)

More documents and movies specific to the different modules are available on the New Year Prep & Help page. And we also have a myriad of free movies and documents available at any time. So if you have a question after support hours, make sure you look at our Version Resources page and Blog to see if you can find an answer to your question.

[New Version Resources](#)

[Blog](#)

Common New Year Support Issues

Accounting Module

If you have been working between 2015 and 2016, but have not updated beginning balances in 2016, this could affect your bank reconciliation. Prior to reconciling your first 2016 bank statement, make sure you update your beginning balances for 2016. Go to **Accounting > Special Functions > Manage Years > Update Beginning Balances from Prior Accounting Year Ending Balances**. You can update beginning balances as often as needed.



How you void a check depends on if it is current or from a prior, reconciled period, and if you are reissuing the check. This document covers the different circumstances when voiding a check. [Accounting Voiding Checks](#)

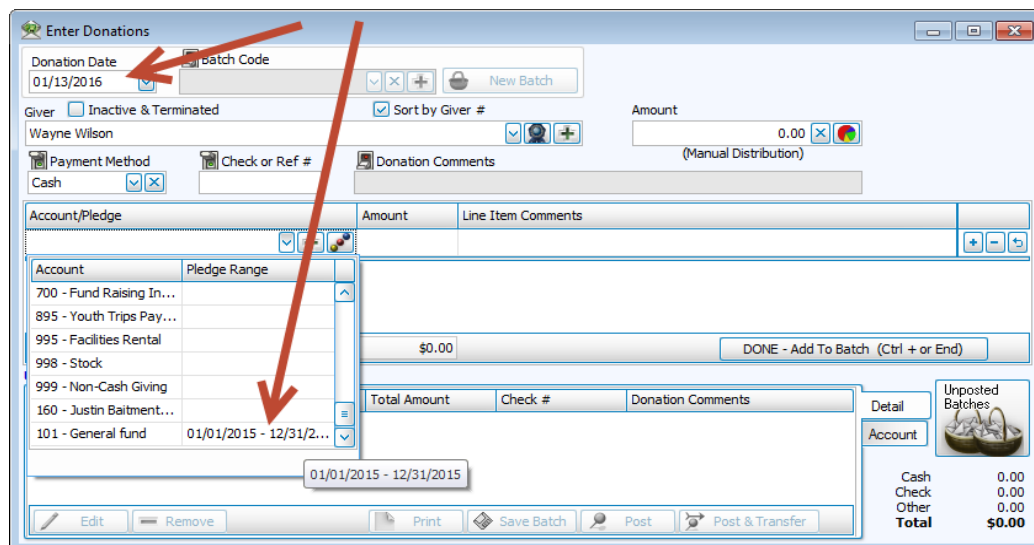
Sometimes you might discover in Pay Bills you have vendors with outstanding bills from prior years. This document details how to clean up those vendors. [Vendors with a Balance from Prior Years](#)

Donations Module

In Donations, there is no end-of-year procedure for opening a new year. Everything is date-driven, meaning the date or date range you enter is what you will see for reports. When entering Donations, you select the date occurred.

Corrections to a posted batch: If you need to correct the date or the batch code, you can do that in Posted Batches. If you need to correct something more specific to an individual giver, then you can go to Donations > Browse and find the specific line, then click Correct.

If someone is still paying off their 2015 pledge commitment, this money must be entered to the giving account used for the 2015 pledge campaign. You can still enter the donation using a 2016 date, but be sure to select the giving account showing the 2015 date range in the drop-down list. You do not need a giving account for prior year's pledge. If you do not post the giving to the account showing the 2015 dates, then the money will not count towards the 2015 pledge.





Create Report: Those Having Prepaid Pledges for Upcoming (2016) Year

Published for V. 18.15.1

If a campaign for the upcoming year has been set up, pledges have been entered to it, and pre-paid gifts have been applied to that new campaign, you can print a report to see how much money has been prepaid.

Open **Donations>Reports/Export>Compare & Analyze>Pledge/Giving Analysis.**

On the **Option** tab,

Set it for the **2015 giving year**

Under **Giving-Include**, select **Only those who gave**

Under **Pledging-Include**, select **Only those who pledged**

On the **Accounts** tab, select the **title of the campaign for the 2016 year**

On the **Columns** tab, elect to show the **Giver** and **Total Given**

On the **Sort** tab, in **Sort Field 1**, choose to set it by a field of your choice: it could be name or Giver # or Total Given (and then select ascending (low to high) or Descending (high to low) order.

Click **Print.**

41st Church of Anytown - Columbus OH Pledge/Giving Analysis: 01/01/2015 - 12/31/2015	
Thursday, December 31, 2015	
Giver Name	Total Given
Jan K Adams	100.00
Brian Hinson	1,000.00
Count: 2 Giving & Pledge selection: Only those who gave and only those who pledged. Accounts selected: All accounts Includes members, visitors. Campaign Selected: Current Fund 2016	

Notice that the giving is for the current year.

But campaign is identified in the summary on the last page of the report. We are looking at those who gave this year to the upcoming year's campaign.



Create Report: Those Who Have Not Met the Prior Year Pledge

Now that it is 2016, you might want to see who has not met their pledge in the prior year. To do this you can go to **Donations > Reports/Export > Compare & Analyze > Pledge/Giving Analysis Report.**

On the **Options** tab set the year to 1/1/15-12/31/16. Select **Giving - All** and **Pledging – Only Those Who Pledge.** Uncheck **Have Met Pledges.**

On the **Accounts** tab select the **2015 Campaign** in the Campaign field.

On the Columns tab select Giver, Total Given and Total Pledged and any other columns you need.

Click Print. The report will show givers who pledged to the 2015 campaign, but have not yet met their pledge.

The New Help Files

The Church Windows Help system has been redesigned. Use the Church Windows Help just like you would when doing a Google search. If you can't find something, Help Search it! It is now web based and will open up in the default browser of your computer. The biggest change is it is now search based. Even though you can still click on F1 in most cases, and it will bring up the topic pertinent to the screen you are currently viewing, if you don't get what you need just try the search option. It is much more comprehensive and should give you more options pertaining to your search. If you have issues bringing up the help or want to view it on a computer that does not open the help correctly for security reasons, you can view the help here, even if you do not have Church Windows installed locally on your computer:

[Church Windows Help](http://www.churchwindows.com/cwhelp) go directly to www.churchwindows.com/cwhelp

[Payroll Help](http://www.churchwindows.com/cwpayhelp) or go directly to www.churchwindows.com/cwpayhelp

Pressing the F5 key on your keyboard will refresh your browser if the information is not displaying correctly.

