



## Recommended Review or Changes BEFORE Converting to Donations

- The Donations module provides the option to track an entire household as one giving unit. If you would like to have envelope numbers convert as “Family giver numbers”, in each household verify the following:
  - The individual who has the “Family giver number” should NOT check “*Use Ind. Name*”.
  - For any individual who will give under the “Family giver number”, make sure they have *Gives with another* checked.
  - For individuals within the household who have their own envelope number (e.g. an adult child living at home), make sure “*Use Ind. Name*” is checked.
- Everyone in Membership that is not terminated will show in Donations. If you do not want persons to show in Donations, they will need to be given a *Reason for Termination* in Membership.
- All saved/unposted batches need to be posted in Contributions before converting to Donations.
- All contribution batches need to be removed or transferred to Accounting at the *Transfer to Accounting* screen before converting to Donations. If you choose to transfer Contribution batches to Accounting, **PLEASE** be cautious of the dating because of bank reconciliations and/or reports.

**Please Note:** We strongly recommend anyone who will be using the Donations module watch the Preview Movie BEFORE converting to Donations. Donations screens are very different from Contributions. The movie will provide an overview of the module. Go to our web Contributions>Special Functions>View Donations Preview Movie.

## Converting Contributions to Donations Module

When you are ready to convert to Donations, we recommend a time when you will be less busy and not in the month of January (which is our busy time).

- Make a Backup of Church Windows in System Administration>Backup Data
- Conversion must be done on the Server/Host Computer for Church Windows.
- Click on *Contributions>Special Functions* choose Convert to Donations.