March 2017 Tech Tips

Membership

Church Windows is fantastic for producing labels, and if you send out lots of mail, you might qualify for bulk mail. Bulk mail requirements vary, so check your local Post Office for requirements in your location. While some Church Windows customers use Postage $aver to enable bulk mailing discounts, some find that they only need to bring a Zip Code Summary report to the post office with the mailings. Here's a way to create that using your Church Windows data.

[Membership: Zip Code Summary using a Pivot Table (v17 & Newer)](#)

Payroll

1. The **Payroll 2017 SR 3 Update** containing the **2017 941 form** will be available on the Church Windows website towards the end of March. **It is essential to install** this update before sending in the 2017 First Quarter 941.

2. Before installing **Payroll 2017 SR3**, make certain a copy of the 941 reports for all 2016 quarters has been printed. Click to open **Payroll**. Click **Sys. Admin.** and then **System Profile**. Set the **Payroll** year back to **2016**. Click **Reports**, **Tax Reports**, **Quarterly 941 Form**.

3. It's also a good idea to print off the three **History** reports for the year 2016. If you are not already in the year 2016, click to open **Payroll**. Click **Sys. Admin.** and then **System Profile**.

Donations

Donation Statements have been sent, but undoubtedly there will be a few donors calling at the last minute frantic to complete their taxes, but who cannot locate their giving statement. To print a giving statement for 2016, there is no year to turn back. Instead go to the Giving Statement and select the date range you would like to see on the statement.

Two of the most common statement issues are a statement not printing, and couples or families who would like their giving combined on one statement getting separate statements.

To make sure a statement prints for a donor, go to **Manage Givers** and on the **Name** tab make sure **Receives Statement** is checked. To make sure that the donor's giving is all on one statement, go to **Manage Givers** then the **Giver #** tab. Make sure **Gives With Family** is checked for each family member.

Accounting

If you have been working back and forth between your 2016 and 2017 accounting years, did you update beginning balances to bring your changes forward into the new year? If not, in your 2017 year, go to **Special Functions** > **Manage Years** > **Update Beginning Balance from Prior Accounting Year Ending Balances**. You can update beginning balances as often as needed.

Many churches never close past accounting years to allow for changes. However, you can close a year to prevent changes. Once a year is closed, while you can view and print from that year, you cannot make any changes to the year. If you choose to close a year, make sure you are done with the year and any audits to that year. This can be done under **Special Functions** > **Manage Years** > **Close Accounting Year**.

Backing up

Remember to regularly make backups of your data. Back up often to prevent possibly having to re-enter data! You can perform this function yourself, and it only takes seconds. Don't depend on someone else. A secondary backup never hurts even if your data is hosted on Church Windows Web.

Church Windows Desktop Backup
Church Windows Web & General Backup Information