



October Tech Tips 2018

CW Current Version 21.18.1/Payroll 2018SR3

New Year Prep & Help

Did you know, you do not have to wait until December 31st or January 1st to open a new year in Accounting? If you are ready to start entering your budget and working between years, you can open your next year and do just that. In Donations you can start your next pledge campaign and start entering pledges. On our [New Year Prep & Help](#) page, peruse free documents and videos covering opening your new year.

Report Tabs – Sort/Columns

Most of the reports in Membership, Donations & Accounting all have a tab for Sort and Columns. The Sort tab is where you set the order for how your information will display on the report. It does not determine what is on the report, but the arrangement such as alphabetic or zip code order. You can sort by up to three fields.

Options Columns Sort (Account) Detail Fonts

Field 1
Sort Field 1 Account [v] [x] Ascending Descending

Field 2
Sort Field 2 <none> [v] [x] Ascending Descending

Field 3
Sort Field 3 <none> [v] [x] Ascending Descending

Reset Sort

The columns tab is where you determine exactly what columns of data you would like to see on the report. On the left are Available Columns, and on the right are Visible Columns, or what will appear on the report. You can move fields back and forth with the arrows in between Available and Visible, and you can arrange the order of your Visible Columns using the up/down arrows to the far right.

Options Columns Sort (Account) Detail Fonts

Available Columns: Period Activity, Comments, Inactive, Plg. Acct., Tax Ded., Print Stmt., Account ID, Account Name

Visible Columns (will appear): Name, Account, ITD Balance

Width*: 35, 12

Accounting

On the General Ledger report, you can add a column called Primary Balance Account. In a multi-lined transaction with more than just one debit and credit, that column will display the account to which the highest dollar amount was posted.

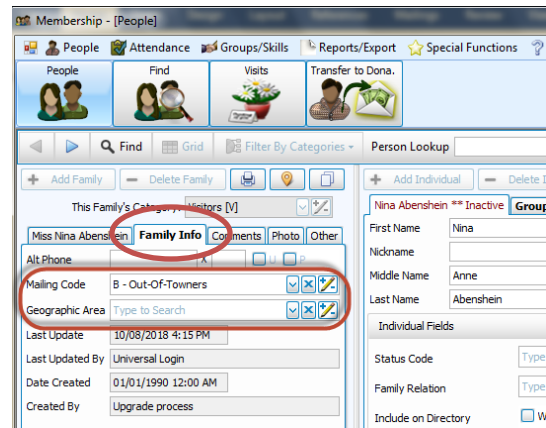


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MANAGEMENT SOFTWARE



Membership

With the recent merge of Members and Visitors into the People database, many people wonder where the Mailing Code and Geographic Area are now located? Those fields are still on the left or family side of the People records. Just click the Family Info tab along the top to find those fields.



Changes

To ensure that you receive updates, news, tech tips, and other important information from Church Windows, please take a moment to make sure we have the current email and/or contact information for your church. This can be done by emailing info@churchwindows.com with your current contact person and email address, or call 800-533-5227 and verify current contact information.

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](#)

