

**PowerChurch Software Newsletter - Year End 2011**

We've got another special edition newsletter here at the end of 2011 to announce an important new service that has been integrated into Version 11.5 in a recent Maintenance Release. We are now able to offer Federal and State e-filing of W2s! This service is integrated with PowerChurch Plus and PowerChurch Online using a third-party provider, who also offers the printing and mailing of employee copies of the W2s. More information is detailed in the article below.

As a reminder, we published a very in-depth year end newsletter last year, which you can read again for some refreshers about the year-end processes in PowerChurch Plus: [www.powerchurch.com/support/227/5/powerchurch-software-newsletter-year-end-2010](http://www.powerchurch.com/support/227/5/powerchurch-software-newsletter-year-end-2010)

**January/February Technical Support Information**

The beginning of the year is always a busy time for everyone; sending out contribution statements/tax receipts, filing payroll taxes, and there are always many new users just getting PowerChurch set up for the first time. Historically, we have experienced around 400% increase in Technical Support traffic by phone and e-mail in January and February. With Version 11.5 only being a couple of months old, we expect this year to be no different!

Throughout the rest of the year, when you call in to speak with someone in Technical Support, you can expect to connect with someone directly, or receive a call back in just a few minutes. During January and February, the call back times are usually more like an hour or two. Support e-mails are normally answered within one business day, but in January and February, you can more realistically expect a turnaround time of two business days.

There are many support resources on our web site that may help you find an answer on your own at no charge, 24/7. We are still here to help and never discourage anyone from asking for assistance. For those who may not know these resources are available, you might be able to save yourself an hour or two of waiting. That can make the difference in whether you have a productive day or not.

Bookmark the pages below in your browser for quicker answers in a hectic time of year!

- **[Knowledge Base](#)**. There are articles, videos, and archives of these newsletters available in the Knowledge Base on our web site. Many of these articles and videos have been written because of questions that frequently come up in Technical Support.
- **[Support Forum](#)**. There is a message board/forum on our web site which is very active each day with new questions and answers being posted by PowerChurch

users, developers, and support technicians alike. Here you can search through thousands of posts over the last few years, or register an account and post your own questions or answers.

## Contribution Statements

The contribution statements in PowerChurch Plus are configurable in so many ways the options will not fit on one form. The Contribution Statements report is made up of a several step process. Before we get to that point, though, there are some options you may not be aware of.

Under File > Preferences > Contributions Setup, click on the Pledges/Statements tab. Here you can specify the title printed on contribution statements and whether you prefer to use "pledge" or "faith promise" terminology. There is also an option to print statements on church letterhead, meaning the program will not print the church name and address at the top of the form. You can specify the top and bottom margins of the letterhead.

Now that that's out of the way, we can move on to generating the actual statements. Under Contributions > Reports - Contributions, you have two choices: either All Contribution Statements or Individual Contribution Statement. If you want to generate more than one statement, choose "All". You can narrow down the list of statements to generate in later steps.

### 1. Select a contribution statement format

PowerChurch Plus includes four layouts of Contribution Statements (five, actually... more on that later). Each of these provide different amounts of detail, as described below.

- **Full Fund Details.** This gives the highest level of detail, showing each date, amount, and contribution fund the money was given to. It also includes a Fund Summary, showing the totals given to each fund. Optionally, you can include memos (notes), designations, and contribution types (check, cash, etc.).
- **Daily Amounts (default).** This gives a total amount given each date, without detailing the fund distributions. This layout also includes the Fund Summary. Optionally, you can include contribution types.
- **Summary.** This layout shows only the Fund Summary with totals given to each fund, but no other details.
- **Total Only.** This shows only the total amount given, with no Fund Summary or any other details.

### 2. Who do you want to print contribution statements for?

The selections on this step pertain to the contributors themselves, not the contributions. It allows you to specify a range of envelope numbers. You can also include only certain people using the Personal Status code selection.

In the middle of the screen, there is a check box that reads "Select people by amount given". There are two connected selections available. The first is for the total amount given and the second is the amount of individual contributions. For these selections to work properly, you will need to enter an amount in both boxes.

If you need to select on the total amount given regardless of the individual amounts, exclude the second selection by filling it with 9s. For example:

*"Print statements for people who have given more than **250** or a one time over **999999999**"*

If you need to select on individual contribution amounts regardless of the total amount given, you would do the following:

*"Print statements for people who have given more than **999999999** or a one time over **250**"*

The "Print statements for people with no contributions" check box will include those who have not given. The

"Print address for contributors not included in mailouts" check box does not change the list of people who will be included in statements. It simply removes the address block of people who have specified they do not wish to receive mail from the church. The "Include in Mailouts" field can be found on the Integrated Data Entry screen.

### **3. What contributions do you want to include?**

Now that you have narrowed down the list of contributors, this step allows you to narrow down the list of contributions to be included on the statements. You can specify a range of fund numbers and select from the list of assigned fund types.

The two different date selections at the bottom of the form have caused some confusion in the past. The first is labeled "Include totals for dates" from and to. This is the date range that will be used in the Fund Summary portion of the statement. Below that is a check box option that reads "Print details for the same dates as totals". Uncheck this option if you would like to specify a different date range for the detailed portion of the statement.

This option can be used if you are generating quarterly statements. For example, for the third quarter, you would show the details from July 1st to September 30th, while the Fund Summary shows the year to date totals of what was given.

Another interesting tidbit about the date fields is the default date range that is selected. The statements will default in the year to date range unless you are running them in January. This one month out of the year, the statements will default to last year's full date range, assuming that you are running year end statements. You can change the dates, if necessary.

### **4. Do you want to print pledge information?**

The first option on this step is "Print pledges". Uncheck this check box if you do not wish to include any pledge information on the statements. Otherwise, there are two other options available: "Print pledge balance outstanding line", which would include an extra line on the statement showing the balance outstanding on the pledge. The second option reads "Print statement only if a balance is due on a pledge". Checking this box will exclude printing statements for those who either do not have pledges, or are paid up to date on their pledges.

#### **5. Do you want to print a message on each statement?**

If you would like to print a message on the bottom of each statement, enter it into the text box on this step. Click the spell check button at the bottom left of the text box to check your spelling. The text in this box is saved and recalled the next time you run statements.

While it is an unlimited text field, the longer your message, the more likely it is that statements might wrap to a second page, so that is something to watch out for.

#### **6. Do you want to print tax receipts? (Canada only)**

To print CRA compliant tax receipts for Canada, make sure the "Print tax receipts" option is checked. Enter the Charity Registration Number and Officer Name. These values are stored in the database and will be used next time you run statements. The statement will print with a line for the officer's signature. It is not currently possible to import a signature image onto the receipts.

The starting receipt number is shown in a read-only field. Per strict interpretation of CRA regulations, the receipt number will be unique each time you run statements. Consecutive receipt numbering was added in Version 11.5, but through our contact with the CRA, the way prior versions of PowerChurch Plus numbered statements is still acceptable.

The "Print web page information" option is checked by default, as this is currently required on receipts. If the web page address to print has changed, enter the new address in the "Website URL" box. If you chose the Total Only statement layout in step 1, an additional option will show up below the web page fields. Version 11 of PowerChurch Plus added the option to print receipts using the CRA Sample #1 layout published in the CRA documentation. This is not a requirement to be in compliance, but is available for those who prefer to use it. This layout has an additional "Location" field which is not pulled from elsewhere in the PowerChurch Plus database.

#### **7. What order do you want to print the statements in?**

This step allows you to specify what order the statements are generated in and offers three options: Alphabetical, Envelope number, and Zip/Postal Code. For Canada, to print the statements in receipt number order choose Envelope/receipt number.

#### **8. Process statements as:**

The last step of the process is where you specify whether you would like to:

- **Print all statements.** Use this option to generate all statements to the screen or printer.
- **Print only statements not set to e-mail.** This allows you to generate printed statements for only those people that prefer not to receive them by e-mail.
- **E-mail statements.** This will create the contribution statement as an Acrobat PDF file and attach it to an e-mail to the contributor. Statements are generated and e-mailed separately to each contributor. There are three options to choose from when e-mailing statements:
  - **Print all statements.** This option both prints and e-mails statements.
  - **Only print statements not e-mailed.** This will send e-mails first, and then will print the rest of the statements that were not e-mailed.
  - **Only e-mail statements.** This option only sends e-mails. No statements will be printed.

There is a check box at the bottom of this form that reads "Restart printing contribution statements". If a problem happened during the printing of statements, like a paper jam or power outage, check this option and then specify the envelope number of the last statement that successfully printed.

### **Name Format Used on Contribution Statements**

The names that are listed on the contribution statements are pulled from Personal Profiles. The names can potentially show in a number of different formats, depending on the number of people sharing the same envelope number.

- **Mr. John Smith Jr.** The full name including title and suffix is used when only one person has the envelope number assigned.
- **John & Sandy Smith.** The names are displayed in this format when two people share the envelope number and are the parents/adults in the household. This is decided the same way that the Church Directory does, referring to the Directory Sequence (Dir. Seq.) field on the Personal Profile record. Directory Sequence 1 and 2 are reserved for the parents/adults in the household and children should be assigned 3 and higher.
- **John Smith & Family.** This name format is used when one or both of the parents/adults in the household, as well as one or more children share the same envelope number.

### **Announcing PowerChurch E-File!**

PowerChurch Software has integrated state and federal e-filing of W2s in Version 11.5. The printing and mailing of the employees' copies is also available. Certain states now require that you e-file, so it was imperative to roll out this functionality before the end of the year.

If this turns out to be a popular feature, it is possible that we could integrate the 1099-MISC and 941 e-filing services as well, but currently, only the W2 e-file is available for PowerChurch Software users. Since this service is processed by a third party, it will require that you create an account on their site. The W2 data is transferred

automatically from PowerChurch Plus for a seamless e-filing process.

With PowerChurch E-File, the pricing is very straight-forward and is documented on the page linked below. You only pay for the services you use.

[powerchurch.nelcoportal.com/Content/Filing\\_Information](http://powerchurch.nelcoportal.com/Content/Filing_Information)

You will find this new option under Accounting > Payroll > Tax Reporting > W2s. Process the W2s as you normally would. On the last step, you will see buttons to align and print W2s and W3s, then the new option to File Electronically.

## **Forum Q & A**

The Support Forum on our web site is a very active online community of our users and Tech Support staff members. There you can browse through thousands of questions and answers, or post your own.

*From Membership:*

**Q.** When I open the Fast Data Entry screen in Attendance, there are no activities in the list to choose from.

**A.** There is a "Record Attendance" setting on the Maintain Activity/Skill Descriptions screen. Check that option for each activity where you will be recording attendance.

*From Accounting:*

**Q.** The wrong amounts are being reported on my 941 Deposit Report. It does not include employer amounts.

**A.** It sounds like the employer liability items in Payroll are not set up as tax items. Take a look at the Maintain Item Descriptions screen and uncheck the "Non-tax item" check box.

*From Contributions:*

**Q.** Some people pledge for 2012 by submitting their checks now because they want the tax credit this year. How do I reflect this in PowerChurch?

**A.** Look up the 2012 pledge on the Enter Contributions form using the Pledge Lookup function. The system will show contribution applied to the 2012 pledge, but the year-end statement in 2011 will show the check.

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