

## **PowerChurch Software Newsletter - Year End 2013**

Welcome to 2013's belated year-end edition of the PowerChurch Software newsletter. In this issue, we dig into the archives for some of the more useful articles from year end newsletters past, review some important updates regarding tax filings for 2013, and discuss the process of reassigning envelope numbers each year.

### **From the Year End Newsletter Archives**

#### [Making a Year-End Checklist](#)

It is a good idea to document your year-end processes, planning what needs to be done, who's going to do it all, and how to do it. Before the year-end madness begins, you should make a checklist. Save a copy somewhere so that you can refer to it next year when, hopefully, your processes will be a little more organized. [Read More...](#)

#### [Year-End House Cleaning](#)

The article linked above starts out with running the Inactive Profiles report then suggests several tasks you can do to clean up your database with the aid of this report. We thought this issue of the newsletter would be an excellent opportunity to expand on this a little bit, with step by step instructions. [Read more...](#)

#### [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. [Read more...](#)

### **Reassigning Envelope Numbers**

There is a utility included in PowerChurch Plus called Reassign an Envelope Number. This is an easy way to change someone's envelope number, moving all their giving and pledging history from the old number to a new number. The envelope number you are moving them to needs to be available, meaning no one else has that number assigned. The exception being when the person who has that number assigned is in the same family/household as the person you are moving. In that scenario, PowerChurch will combine the two envelopes into one.

At this time of year, this is a very common topic of conversation in Technical Support and on the support forum on our web site. There are a number of different reasons why you would need or want to rearrange envelope numbers each year. In this article we discuss the two most common: reassigning envelope numbers to condense the number of printed envelopes you need to purchase, and reassigning everyone's numbers into alphabetical order.

## **Moving inactive contributors to free up envelope numbers**

If your church purchases numbered envelopes for your contributors, it makes sense to keep your contributor list updated with only those that are actively contributing. This makes for a smaller number of envelopes to buy and in turn saves the church money.

In PowerChurch, you can assign envelope numbers from 1 to 99,998. For this example, let's say you have envelopes 1 to 250 that are used for active contributors. In the last year, you had six contributors become inactive for one reason or another and twelve new contributors have been added and were assigned numbers outside of that range.

The first step in this process would be to use the Reassign an Envelope Number utility to move inactive contributors out of the 1 to 250 number range. Reassigning them into a higher number range will free up their old number, while maintaining their giving and pledge history.

Once you have moved the inactive people into a higher number range, the second step would be to run the Unused Envelope Numbers report found under Contributions > Reports - Contributions. Select the number range of 1 to 250. This will print a list of envelope numbers in that range that are not currently assigned to anyone.

The final step in the process is to use the Reassign an Envelope Number utility to move your new contributors into the lower number range, assigning the available numbers that were included on the Unused Envelope Numbers report.

## **Reassigning envelope numbers into alphabetical order**

There are a couple of things that we hear most often as to why you would want to reassign all of your envelope numbers into alphabetical order each year. The first is that somewhere, there is a printed list of names and envelope numbers that people refer to when entering contributions. Second, and more commonly, it is easier to hand out the new bundles of envelopes when they are in alphabetical order. Rather than using the Reassign an Envelope Number utility to address these situations, let's look at some more efficient ways of handling them.

When entering contributions, you can lookup a person by name, rather than typing in an envelope number, with just one extra keystroke or mouse click. Press the F2 key from the Envelope Number field or click the lookup button (magnifying glass icon) to the right of the field to open an alphabetical list of contributors. Begin typing the last name of the person you are looking for and the cursor will jump down through the list as you type. This is a very quick and efficient way to bring up someone's envelope number, much moreso than looking at a printed page while entering contributions.

Next, let's take a look at a better way to distribute the printed envelopes at the beginning of the year. You can print mailing labels from PowerChurch that have the name and address as well as the envelope number listed on them. When printing those labels, you can print them in either envelope number or alphabetical order. This method does require that you match up the labels and envelopes, but that will be much less work than the alternative of reassigning everyone's envelope numbers.

If you choose to reassign all of your envelope numbers, here are some things to take into consideration. Because the Reassign an Envelope Number utility requires that the number you are moving someone into is not currently assigned to anyone else, you will first need to move everyone, one by one, out of their current envelope numbers into a higher number range. Doing so will make the lower envelope number range available, so that you can then, again, one by one, move everyone from the higher numbers back down into the lower numbers in alphabetical order. As you can see, this process is very labor intensive and is not recommended.

## Tax Forms and E-Filing in the New Year

Below is a list of tax forms and services, along with what versions of PowerChurch Plus are supported:

- **1099-MISC Form** - Versions 11 and 11.5 will work with compatible forms for 2013. Version 11.5 can e-file 1099-MISC forms.
- **W2/W3 Form** - Versions 10, 11, and 11.5 will work with compatible forms for 2013. Version 11.5 can e-file W2 forms.
- **941 Form** - Versions 11 and 11.5 will be updated once new forms are published for 2014. Version 11.5 can e-file 941 forms.

Visit [powerchurch.nelcoportal.com](http://powerchurch.nelcoportal.com) to register an account for the PowerChurch E-file service. There you can choose which services you would like, including state and federal electronic filing, print and mail service, and even e-mail service. If you plan to print forms rather than electronic filing, we recommend Dynamic Systems. Their tax forms, computer check stock, and other business forms are the ones we used when developing those features in PowerChurch, so everything will line up without issue. Visit [their web site](#) to order or view sample products.

## 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 Payroll:*

**Q.** When a check is printed on November 25 for a December 1 payroll, does the check post for November or December?

**A.** Change the date of the check to December 1 and post it to the month of December.

*From General:*

**Q.** I just installed PowerChurch on a Windows XP machine and reports are rounding off dollar amounts.

**A.** Check the Regional and Language Settings in the Control Panel. Make sure that "number" and "currency" options both show two decimal places.

*From Contributions:*

**Q.** I would like to delete all church members who have not given since 1/1/2012. Is

there a way to do this all at once?

**A.** The IRS mandates that you retain four years of contributions history, so if they have given in 2010 or 2011, you need to be able to have ready access. That said, there is not a "mass delete" function in Membership.

*Created: 12/16/2013*

*Last updated: 04/24/2015*