



## New Year Fund Advancement

The **New Year Fund Setup** process helps you set up the details of a new fund period for existing funds. It also determines which families will be transferred to the new fund period or have the fund period automatically added to their record. Use this process to:

Transfer inactive families or skip inactive families. Transfer the fund keywords from the current fund period into the new fund period. Transfer billing addresses from the current fund period into the new fund period.

Transfer current fund terms and rates for the families or set up new terms and rates for families based on current rates or on information about family members. Transfer information about EFT accounts to the new fund period. Delete the oldest fund period. Combine the two oldest fund periods.

### To setup a New Year fund: On the main menu click **Processes**.

On the **Contribution Processes** tab click **New Year**.

Click **Yes** to create a backup. When the backup is complete, the New Year Fund Setup Process window displays a list of current funds.

To choose a fund, select the **Advance Fund** option beside the fund name. The fund number, fund name, and existing periods display for the selected fund.

Enter values and set options and rates for each fund. Set up as many funds as needed. The information you enter will be saved automatically when you select the **Advance Fund** option for the next fund. You may move back and forth between funds as needed.

To advance all funds at once, click **Process**. To begin processing, click **Yes**. To return to the New Year Fund Setup window, click **No**. Click **Yes** to the confirmation message. Click **Preview** or **Print** to retrieve

### 1. For Version 17.4 , Select Fund Process 2. Select New Year, **You must select a Fund for Processing.**

- **Fund 1** for Church Contribution, **Fund 9** for Diocesan

#### Upon selecting the Fund Review the Individual Details

- The most critical is line **9) HOW IS THE LAST PERIOD TO BE HANDLED**
- This should always be set to **Delete**
- Note if you do not have 5 Periods This line will not appear, and is not an issue. Census is designed to hold 5 years of History.

#### Upon Selecting the Fund and it's Details You will be prompted.

Enter Y (yes), at this point you can select another Fund to Mark or select P to process the marked Funds. The Program will prompt you to create a backup, after the completion of the Backup, Press Enter to continue and the system will process the Funds you have selected.