



# 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:

1. Transfer the fund keywords from the current fund period into the new fund period.
2. Transfer billing addresses from the current fund period into the new fund period.
3. 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.
4. Delete the oldest fund period.

To Advance your Fund for New Year:

1. Select Contributions
2. Select Processes.
3. Select New Year Fund setup Process.
4. It is required to create and save a backup on a CD or Flash Drive for permanent record. When the backup is complete, the New Year Fund Setup Process window displays a list of current funds.
5. Select Choose the Fund to Process. When you mouse over the fund number, fund name, and existing periods will display for the selected fund.
6. click **Process**. To begin processing, click **Yes**. To return to the New Year Fund Setup window.

**This process creates a new fund period and sets up the new fund for the families currently using the existing fund.**

Choose the Fund to Process: 1 Church Contributions

Fund Number: 1 Fund Name: Church Contributions Periods: 1-10 (1/2010 thru 12/2010)  
1-09 (1/2009 thru 12/2009)  
1-08 (1/2008 thru 12/2008)  
1-07 (1/2007 thru 12/2007)  
1-06 (1/2006 thru 12/2006)

New Fund Identifier: 1 - 11 Goal: \$0.00

Date Range for the New Fund Period: 01/01/2011 Thru 12/31/2011

Which Families are to be Transferred: All Families

Transfer Inactive Families:  Yes  No

Transfer Fund Keywords:  Yes  No

Transfer Billing Addresses:  Yes  No

Transfer/Change Rates: No Terms & Rates

Transfer Current Billing Periods:  Yes  No

New Billing Period: [ ] Thru [ ]

Preserve Billing Day  
(Preserve Billing Day sets each billing start date to the day of the month it is set to now.)

Transfer EFT Information:  Yes  No

How is the Last Period to be Handled: Delete Oldest Fund Period

**Note :** If your parish is involved in an extended giving campaign and you have entered rates for individual families you may want to consider transferring rates then select;

Transfer/Change Rates:

Transfer Same Terms & Rates as Last Period