

New Year Fund Advancement

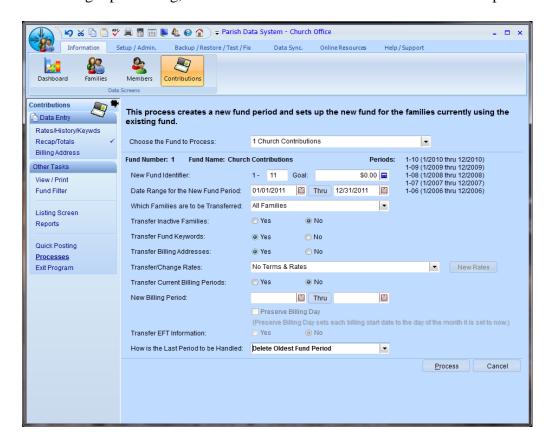


The **New Year Fund Setup** process helps you set up the details of a new fund period for existing funds. It also determines which families will be transferred to the new fund period or have the fund period automatically added to their record. Use this process to:

- 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. <u>It is required to create and save a backup on a CD or Flash Drive for permanent record.</u> 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.



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;