# ADVENTISTGIVIING

for Church Treasurers

## How to Get Help

AdventistGiving has a very responsive email support desk. We do not manage a phone support desk. The quickest way to get answers to your questions is to email us. We often must send step by step instructions in response to questions that come in. Please feel free to share this email with your members as well. We provide email support to church treasurers and donors at this address:

Help@AdventistGiving.org

## Very Important Year-End Tax Information:

AdventistGiving receives donations **on behalf** of your church. The money initially comes to the North American Division of SDA bank account and we pass it on to you in our twice per month deposits.

**December 31:** Donations are received by AdventistGiving until midnight in the time zone of the church on December 31. Our *Official deposit report* will be posted to your treasurer's account on January 1 so you can begin your end of year reporting as soon as possible. The deposit to your bank that matches this report will arrive on the 4th business day of January. This report and deposit will contain donations for December 16-31***.*** ***All of these donations MUST be recorded in your account program in the year they are received and not carried to the next year so do not close your books until you have added this last report and deposit.*** For more help on this please contact Help@AdventistGiving.org.

You are to consider donations received by your church when the NAD receives the money and not when your church receives the money from us.

## Access your Treasurer's Account

Please use Mozilla Firefox or Google Chrome web browsers when accessing your treasurer's account.

**HOW TO LOG INTO YOUR ADVENTISTGIVING TREASURER'S ACCOUNT:**

1. Go to: **https://adventistgiving.org**
2. Click on *Log in* in the upper right corner of the screen and log in.
3. Click the down arrow beside your name (or Treasurer User) in the upper right corner of the screen and select the treasurer portal for your church.

**YOU WILL USE YOUR TREASURER'S ACCOUNT TO MANAGE ADVENTISTGIVING FOR YOUR CHURCH. YOU CAN:**

1. Generate Reports
2. Manage Offering Categories
3. Update bank Information

## Generate Donor Transaction Reports

For the security of your church members we do not send reports by email.  Please log into your treasurer's account to obtain donor giving information.

***Official depots reports*** are posted twice each month.

- On the *1st day of the month* we post donation information for days 16 to the last day of the month, for the prior month.  A deposit that matches that report will be sent to your church bank account on the 4th business day of the month.
- On *16th day of the month* we will post donation information for days 1-15, of the current month.  A deposit that matches that report will be sent to your church bank account 3 business days later.

**If the 1st or 16th day of the month falls on a weekend or Holiday, reports will be posted the next *business* day.

**Official deposit reports** will always match the deposit we send to your church bank account.  Please only use the Official deposit reports for posting to your accounting program.

**Pending transactions reports** provide information about donations that have been given but not yet included in the Official deposit reports.  You should not post donations seen in this report to your accounting program since they are still considered pending and may not fully process.

**View a date range reports** can be helpful for those who post giving figures in church bulletins.  However, you should not post donations to your accounting program from this report as it may not match the deposit we send to your bank

**HOW TO GET YOUR REPORTS:**

1. Go to **https://AdventistGiving.org**
2. Click on *Log in* in the upper right corner of the screen and log in.
3. Click the down arrow beside your name (or Treasurer User) in the upper right corner of the screen and select the treasurer portal for your church.
4. Click on *Generate Reports*.  Reports are available print/download in PDF and CSV formats.

## Manage Local Offering Categories

As church treasurer you will add/remove and set the order of **the local offering categories** for your church.  The Tithe category is already provided at the top of the envelope, as are the Conference/Union and World offering categories.  You will not be able to add/delete or change of the order of these categories on the envelope.

**VERY IMPORTANT RULES TO FOLLOW:**

1. **Do not add Tithe** as a local offering category.  We can only receive Tithe donations through the category already provided at the top of the electronic tithe envelope.
2. **Only add specifically named tax-deductible donation categories** to your local offering list.  Do not add "Misc" or "Other" non-specific categories.  You also **may not add** payment categories of any kind as an offering category.  This includes Pathfinder Dues, Facility rent, Tuition, Dues, Fees, book payments, etc.

**HOW TO ADD LOCAL OFFERING CATEGORIES:**

1. Go to **https://AdventistGiving.org**
2. Click on *Log in* in the upper right corner of the screen and log in.
3. Click the down arrow beside your name (or Treasurer User) in the upper right corner of the screen and select the treasurer portal for your church.

4. Click on *Manage Offering Categories*
5. Click on *Add category*
    a. Enter *Category Name*
    b. Enter *Local* Code (this is your local accounting code, which will appear on your reports if you add it)
    c. Add a *Description* if you wish so your members will better understand the category.
    d. Click on *Save Category*
    e. You will see the category listed at the end of your list. Notice there are columns called:
        i. **Active**: Click the radio button if you want this new category to show on your electronic tithe envelope
        ii. **Featured**: Click this radio button if you want this category to show on the front of the tithe envelope. <u>You can have up to 10 local offering categories appear on the front of the tithe envelope.</u> If you add more than 10 categories, they will appear on the second page of the tithe envelope and you can find them by clicking *More offering categories* under the local offering section of your tithe envelope.
    f. Click on *Commit Changes* to fully save the new category.

**HOW TO INACTIVATE/ REMOVE AND/OR FEATURE/UN-FEATURE LOCAL OFFERING CATEGORIES:**

1. Go to **https://AdventistGiving.org**
2. Click on *Log in* in the upper right corner of the screen and log in.
3. Click the down arrow beside your name (or Treasurer User) in the upper right corner of the screen and select the treasurer portal for your church.
4. Click on *Manage Offering Categories*
5. Find the category you want <u>Delete or Inactivate:</u>
    a. **To delete**, click on the X if is it available to delete a category. When the X is not available it is because you have already received donations under this category, and you cannot delete it. You can, however, inactivate it.
    b. **To Inactivate**, click on the radio button in the *Active* column so it is white. This inactivates the category and members will not be able to see it.
    c. Click on *Commit Changes* to save.
6. Find the category you want to <u>Feature or Un-Feature:</u>
    a. **To *Featur*e** click on the radio button in the Featured column so that it is black
    b. **To Un-Feature** a category, click on the radio button in the Featured column so that it is white.
    c. Click on *Commit Changes* to save.

**HOW TO SET THE ORDER OF YOUR LOCAL OFFERING CATEGORIES:**

1. Go to **https://AdventistGiving.org**
2. Click on *Log in* in the upper right corner of the screen and log in.
3. Click the down arrow beside your name (or Treasurer User) in the upper right corner of the screen and select the treasurer portal for your church.
4. Click on *Manage Offering Categories*
5. Click on the offering category and drag it up or down the
6. Click on *Commit Changes* to save the order you have set.

**HOW TO ADD LOCAL ACCOUNTING CODES TO THE TITHE, CONFERENCE, AND WORLD OFFERING CATEGORIES:**

You may add your local accounting codes to these categories of offerings so that when you see our reports your codes will appear. You cannot make any other changes to these categories.

1. Click on one of the categories (Tithe, Conference or Word).
    a. You will see the offering categories listed under each one.

i. Click on the *edit pencil* to add your own accounting code.
ii. Enter your local accounting code in the *Override Code* box
iii. Click on *Save Category*
iv. *Click on Commit Changes to save.*

## Non-Local Donations to be sent to Conference

All non-local offerings (Tithe, conference and world offerings) that come in through AdventistGiving are your responsibility to send to your conference, just like you do for money that comes in paper tithe envelopes in your offering plates on Sabbath.

## Member Tax Receipts

You are responsible for providing tax receipts for the donations made through the AdventistGiving service just like you do for the cash or checks you collect in your church each Sabbath.  You also need to pass on to your conference any non-local funds received through this service.