Revelations

Church Management Software

Edition: REVL405

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Have a question?

If you are unable to find the answer to your question using online help, you can contact a ***Revelations*** customer support engineer via:

Internet

Website: www.revelations.com

Email: support@revelations.com

Phone

(218) 236-1899

8:00 am to 5:00 pm CST

Monday thru Friday

There is also an online help for current Revelations customers at www.revelations.com. Access to the online help requires the telephone number and serial number from your registration letter. The serial number for Revelations can also be found by going to System – Owner Setup – Register Product.

This online support area has a searchable FAQ, update downloads, and sign up for access to the Customer Support Group email list.

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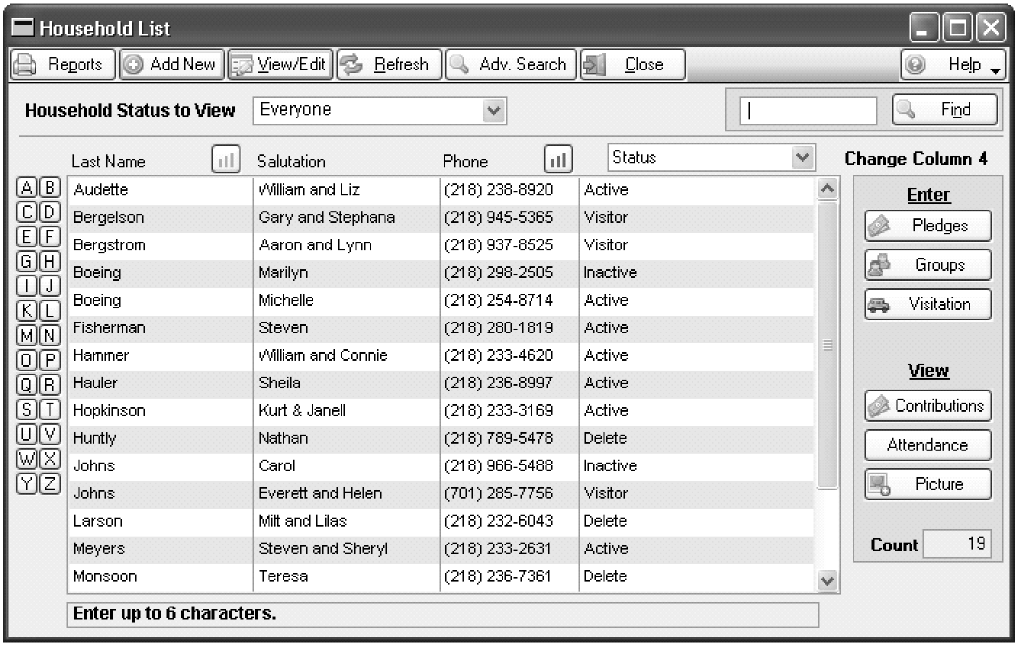


The household list contains the list of the households for the status that was selected at the top of the screen. The list can be sorted by pressing the column header. Think of this window as a file cabinet containing all the household folders in groupings by status. Change the status to ‘Everyone’ to see all the folders at once. A specific household can be found quickly by entering up to 8 characters of the last name into the **Find** box and pressing the **Find** button. When the status is set to **Delete** a button labeled **Delete a Household** will appear on the menu bar. This can be used to physically remove the selected household from the database.

Using the **Add New** and **View/Edit** buttons at the top of the **Household List** window, to add, change, or view detailed information about a household. To view information or make changes to a household, highlight the household record by pressing the left mouse button anywhere on the record and then pressing the **View/Edit** button or double click anywhere on the desired household record. Control will then pass to the Household form. The buttons on the right side of the window allow you to work with activities related to a household. To associate a picture with a selected household press the camera icon. Different print options are available from the Reports button. Additional reporting options are available under the ‘Reports’ button on the menu bar.

Deleting a household

There are two ways to remove households and their members from the database. One way is from this window by setting the ‘Household Status to View’ to **Delete**. A button called **Delete a Household** will appear on the menu bar. Select a household from the scroll window and press this button. The other option is to remove all households with the same status code. Go to **People – People Utilities** to use this method.

Sorting (Households)

Click on the column headers above the scroll window to re-sort the Household List by the selected heading.

Zone Code

The zone field may be used to separate households into local geographic areas to better track and manage the geographic areas of your church. All characters are left justified and sorted from left to right. Be careful when using numeric characters as unexpected results can occur. For ex: the value 12 will come before the value 2 since the leftmost character 1 (in 12) is less than 2.

Quick View/Edit

Double clicking a household record in the scroll window is the same as selecting a household with a single click and pressing the **View/Edit** button.

Special Window Fields – Household List

Households to View

A household may have a choice of 29 different status codes. The system installs with 4 status codes; Active, which is the normal status for a family, Visitor, Inactive or Delete. Select the appropriate status code from the drop-down list to view the associated church members. Go to the System Preferences form to add additional status codes.

Find Household

Type up to 8 characters to be used to find the last name of a household. Click the Find button to start the search. The scrolling list of names will display, starting with the last name that most closely matches your selected search name. This field is case sensitive. The A – Z buttons to the left of the Household list can also be used to scroll to the first record of that letter.

Household

Last name of the household

Salutation

Head of household name(s). For married couples this field should contain the names of both the husband and the wife (ex: John and Mary). The salutation of a mail merge would then read Dear John and Mary.

Phone

Primary phone number for the household.

Zone

Geographic zone for this household. The zone field may be used to separate households into local geographic areas to better track and manage the geographic influence of your church. Alpha characters should be used to define the zone instead of numbers since the field is sorted left justified.

Special Buttons – Household List

Reports

Use this button to access household reports.

Add New

Use this button to add new households to the church.

View/Edit

The View/Edit button displays the household information for the selected household. A household is selected by clicking on the associated row in the Household List.

Adv. Search

Use this button to perform an advance search of the households using various search criteria.

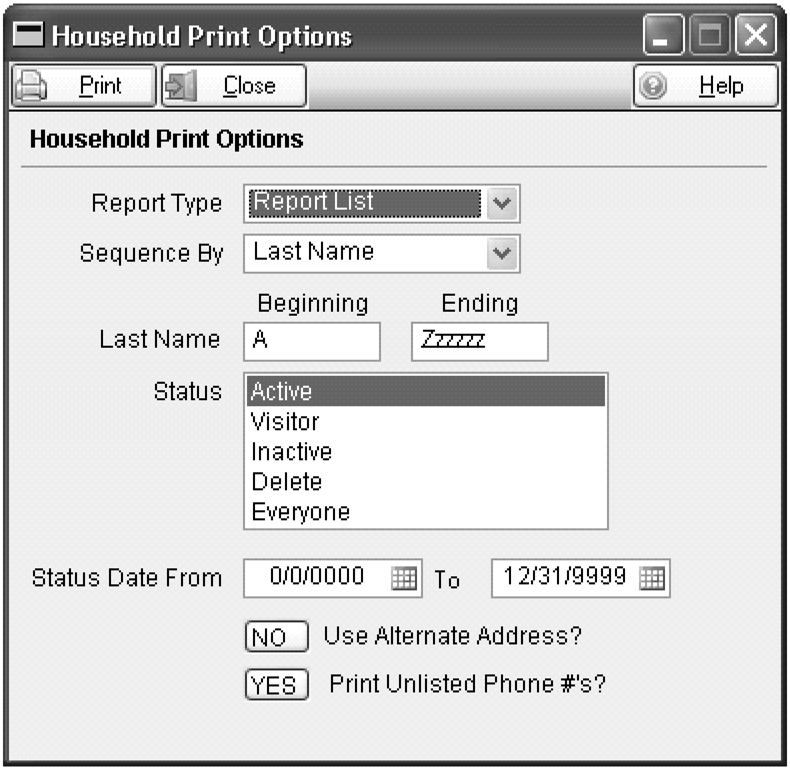
Pledges
Contributions
Groups
Visitation
Attendance
Picture

The buttons at the right of the household provide related information about a selected household. Select a household by pressing the left mouse button anywhere in the household and then press the desired button.

Delete a Household

This button only appears on the menu bar when the ‘Household Status to View’ is set to ‘Delete’. Select the record to delete from the scroll window and press this button.

Household Reports Options



Press the **Reports** button to open this window. Using the **Household Reports Options**, a number of different household lists and mailing labels can be prepared. Additional reports are available from the ‘Reports’ button on the main menu.

Mailing Label Format

The default label format is the default format selected on the System Preferences window.

Special Window Fields – Household Reports

Report Type

Select the type of output you wish to produce. You may select a report or mailing labels. To create an export file for use with a word processor or some other software package, press the **Reports** button on the top menu bar and select **Labels & Merging**.

Sequence by

Select the sort sequence for the report

Last Name, Zone, Zip Code

This field will change depending on how the question **Sequence By** was answered. To print a range of names, type in the letters of the last name or zone in the 'Beginning' field and the last name or zone you want reported in the 'Ending' field. Accept the default to print all households. The beginning default value is zero when sorting by zip code and 1 for zone code.

Beginning A

Ending Azzzzz

Status

Select the status of the households to be included in the report. To select a single status, just click on the appropriate status. To include more than one status, hold down the Ctrl key on the keyboard and click the other status codes. Using Ctrl + Mouse Click, lets you select multiple status codes.

Status Date

Only the households that had the selected status codes, and are between the status dates, will be included in the report. Generally, this is left with the defaults.

Use Alternate Address?

Click on this field to change the setting to either Yes or No. When **Use Alternate Address** is set to Yes, the report will include the alternate address for a household if the alternate address date range is currently active. Alternate addresses are typically used for households that move between two different locations over the course of the year (example: a summer vs. winter address for a household)

Print Unlisted Phone #'s?

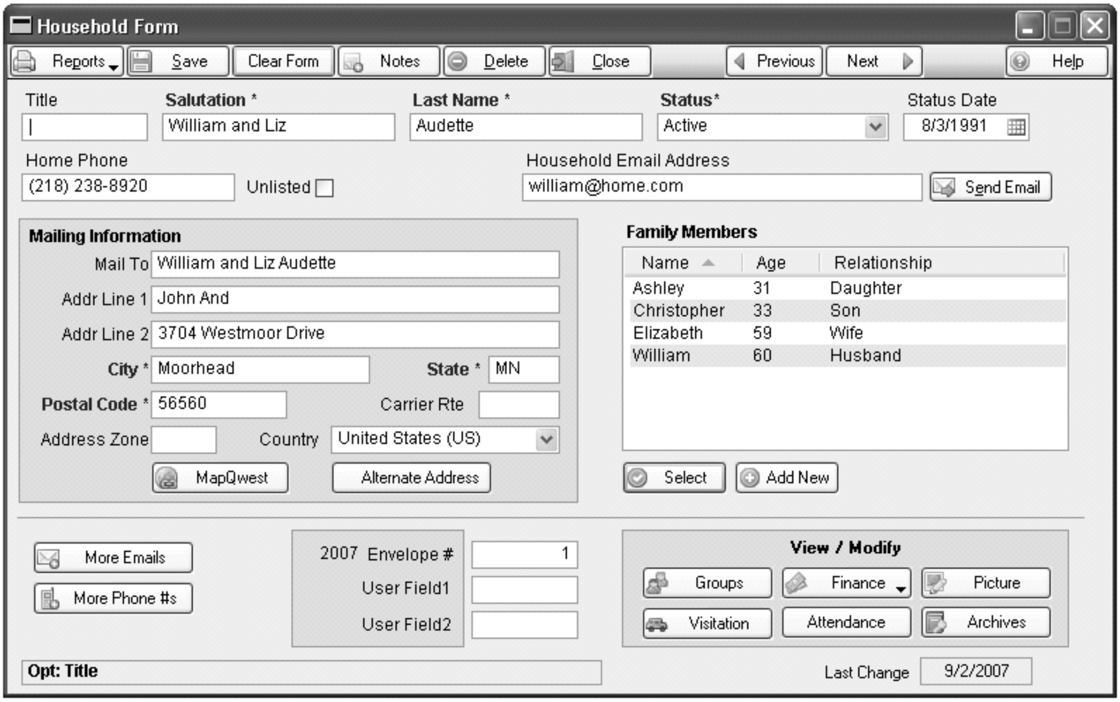
You have the choice when printing household reports whether to print unlisted phone numbers. If you chose not to print these numbers, the unlisted numbers will be replaced with asterisks.

Special Buttons – Household Reports

Print

Click the Print button to generate the report. The system will display a Report Destination window where it can be viewed, printed or saved.

Household Form



The household form is used to add a new household to the database or to modify a household's existing information. In addition to recording the demographic information of a household, this screen can be used to access household pledges and contribution information, the groups this household belongs to, visitation activity, etc. Note the buttons on the right side of the form for the various options available.

NOTE: Adding new members to the database must be done by first going to the appropriate household form and then press the **Add New** button below the **Family Members** box.

Access the **Household Form** using any one of the following methods:

1. Click the **Add New** button on the **Household List** window to add a new household.
2. Click the **View/Edit** button on the **Household List** window to view the detailed information related to a selected household
3. Click the **Household** button on the **Member Form** window to view the household details of a member.

Regardless of how you get to the **Household Form**, the window is used for the same tasks - viewing the detailed information for a selected household or adding/updating this information. Generally speaking, a household is denoted by a physical location that can be identified by an address.

You can either edit the information displayed on the window or access other household information through a series of buttons at the right of this window. Pledges, Groups, Visitation, Contributions, Attendance, Picture, Alternate Address and Archive data are all available.

Using the Family Members box

Double click on a name in the **Family Members** to work with data for a particular member in the household. To add a new member, click the **Add New** button located below the **Family Members** box.

Household Status

While the status of a household's members can be different than that of the household the default is the same. When the status of a household is changed a message will appear asking whether the status of all the members should be changed.

Deleting an Existing Household

Pressing the **Delete** button is the same as changing the status field to delete and pressing the **Save** button. In both cases the household and its members all have their status changed to 'Delete' but the records are NOT physically removed from the database. A member of a family that is marked as deleted may be re-activated from the member form. To physically delete a household refer to the section that discusses the **Household List**.

Printing Labels

When labels are printed using the **Print** button, the "Mail To field is used as the first line. If that line is blank, the household name is built by combining the title, salutation, and the last name.

Duplicate Names

Duplicate names are not allowed, however, to be a duplicate both the first and the last name must be the same. If there are two John and Mary Doe's, then include their middle initial as part of their Salutation.

Envelope Number

Envelope numbers can be assigned to both households and to members of a household. Envelope numbers can be assigned to a household or member using the 'Envelope Maintenance' form found under the 'Finance' button. A household or member must be assigned an envelope number of zero or non zero before any financial information can be recorded for them.

Special Window Fields – Household Form

Title

While it's becoming more common to omit the title when addressing letters to households, this field exists for that purpose. Ex: Letters could be addressed as Dear Mr. & Mrs. (Last Name).

Salutation

The first name(s) of the household. Enter the name as you would like it to appear in the salutation portion of a letter to the household. Ex: Dear Steve and Becky (the word Dear is not part of the salutation).

Last Name

Last Name of the household. A household name is a combination of the salutation plus last name. Together these two fields must be unique, otherwise, an error 17 will be received when you press the **Save** button. If there are two John Doe's in the church include a middle initial to create uniqueness.

Status

There can be 29 different status codes. The system installs with four. Additional codes may be entered using the System Preferences form and pressing the Modify Drop Down button. Note: When the household status is changed, you have the option to automatically change the member's status to the same value. To give a member a different status than the household, proceed to the member form.

Status Date

Enter the date this status code was effective. This is an optional field but can be used to track when a household became active, inactive, etc..

Mail To

When this field is left blank, the first line of a mailing label is built by combining the title, the salutation, and the last name. Fill in this line to change the default. Example: A Widow may want mail addressed as Mrs. John Doe but the salutation would be Jane.

Address Line 1, Address Line 2

First line of household address – 40 characters

Second line of address – 30 characters

City State

City and state for this household

Postal Code

Postal code for the household. You can format this anyway you want. For US zip codes enter a dash between the first 5 characters and the last 4 characters when entering a 9 digit code.

Address Zone

The zone field may be used to separate households into local geographic areas to better track and manage the geographic areas of your church. All characters are left justified and sorted from left to right. Be careful when using numeric characters as unexpected results can occur. For ex: the value 12 will come before the value 2 since the leftmost character 1 (in 12) is less than 2.

Carrier Rte

Specific Carrier Rte for the Postal Carrier that handles deliveries.

Country

Set the default country using the 'System Preferences' form.

Phone #'s

Phone number for the household. Additional numbers can be added by pressing the button labeled **More Phones**. The button **More Phones** opens a modal window which means that access to other windows in Revelations is disallowed until this window is closed. Go to 'System – System Preferences' and press the button **Home Phone – Emails** to define additional phone numbers. Up to 10 phone categories can be defined.

Listed/Unlisted

The home phone number will not print on the church directory or on the Household phone list when this is set to unlisted.

Email

Email address for the household. Five additional Email addresses can be assigned to a household by pressing the button **More E-mails**. The button **More E-mails** opens a modal window which means that access to other windows in Revelations is disallowed until this window is closed. Go to 'System – System Preferences' and press the button **Home Phone – Emails** to define additional. Up to 5 Email categories can be defined. To remove an email address, simply highlight the address to be removed and press the **Save** button.

User Field 1, User Field 2

These are user defined fields of 10 characters each. Give names to these fields by going to the form 'System Preferences'.

Special Buttons – Household Form

Reports

Four options appear: **Envelope #10, Envelope #10 w/Return Address**, **Profile Report** and **Single Label**. The Profile report opens a window from which categories of information can be printed regarding the selected household. To print a profile of more than one household go to **Reports – Membership Reports** and select the Household category and then the **Census Transfer** report. The **Single Label** option opens a window where the location of the household label to be printed on a sheet of labels can be indicated.

Save

Click this button to save all of the information on the window.

Clear Form

Click **Clear Form** to clear all the data fields on this window. Use the **Clear** button to refresh the window to allow for the entry of a new household. The default city, state and zip code, will be used from System Preferences.

Delete

Pressing the **Delete** button is the same as changing the status field to delete and pressing the **Save** button. In both cases the family and its members (optional) all have their status changed to deleted but the records are NOT physically removed from the database. To physically remove a household from the database, consult the **People Utilities** section of the manual. From there, all households marked with a delete status can be deleted. Another way is to set the status field on the **Household List** to 'Delete'. Any household on this window can be deleted one at a time.

Notes

Opens a special Notes window for display and entry of detailed household information. Blue lines appear on the button when information is entered.

Picture

Press to assign a picture to this family or to view a family picture. A photo icon appears on the button when a picture is assigned and a camera appears when no picture is assigned.

Select

Use the **Select** button to display information on a selected church member. To select a church member, click on the member's name in the **Member List** and then click on the **Select** button or double click directly on the member name.

Add New

Click **Add New** to access the **Family Member Form**. The **Add New** button is used to enter information for a new family member.

Finance (Pledges and Contributions)

Groups

Visitation

Attendance

Use any one of the buttons at the right of the **Household Form** to access information about the selected household.

Alternate Address

Display or enter alternate address information for the selected household. The alternate address is date sensitive. Revelations will automatically switch between a household's primary address and alternate address based on the starting/ending dates on the alternate address record. A green dot appears on the button when the address is active.

Archives

A pop-up window appears displaying family members that have been archived. A member that has been archived can be un-archived from this window.

MapQwest

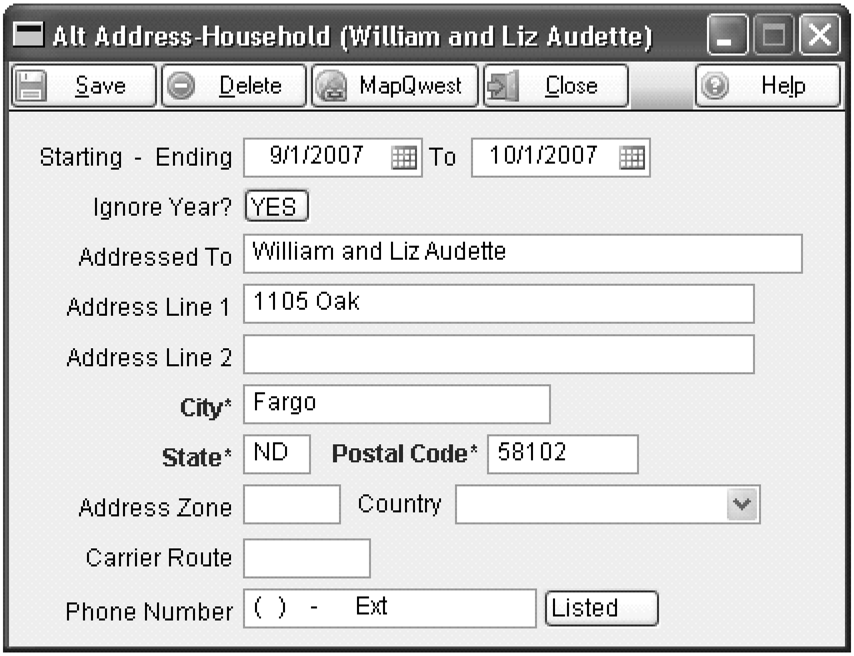
Use this button to display an online map and directions to the address listed on the household form. The online map from www.mapqwest.com will require access to the Internet.

Family Member

The **Family Member Form** is used to add or edit detailed information on members. Although this screen may be accessed from either the **Household** form or from the **Family Member List** new members cannot be added from the **Family Member List** form. To add a new member, first go to the household form for that member and press the **Add New** button located below the **Family Members** window. Once the member form is open all the family members can be added.

Details and instructions on how to complete this form are found on the **Family Member Form** in the Family Member section of this manual.

Alternate Address for Household



Alternate Household and Member Addresses

Revelations stores both household and member alternate addresses. The **Alternate Address** button on the **Household Form** allows you to record the movements of an entire household. The alternate household address could be used to track either a one-time move or annual household movements.

The **Alternate Address** button on the **Family Member Form** can be used to specify alternate addresses at the member level. Even if a member belongs to a household, the member alternate address can be used to track one-time move or annual member movements (ex: college students moving away from home on an annual basis).

Special Window Fields – Alternate Address

Starting – Ending

Enter the starting and ending dates for which the alternate address will be active. The household alternate address is defined for households that reside at more than one address over the course of a year.

Ignore Year?

If the members of a household typically repeat their move from the primary to the alternate address year after year, then set **Ignore Year** to “Yes”. If the move to an alternate address will not be repeated, then set **Ignore Year** to “No”.

Addressed To

Enter the ‘mail to’ name as you want it to appear on address labels

Address Zone

Enter up to 5 characters of an address zone. See the description under **Household** form for more information.

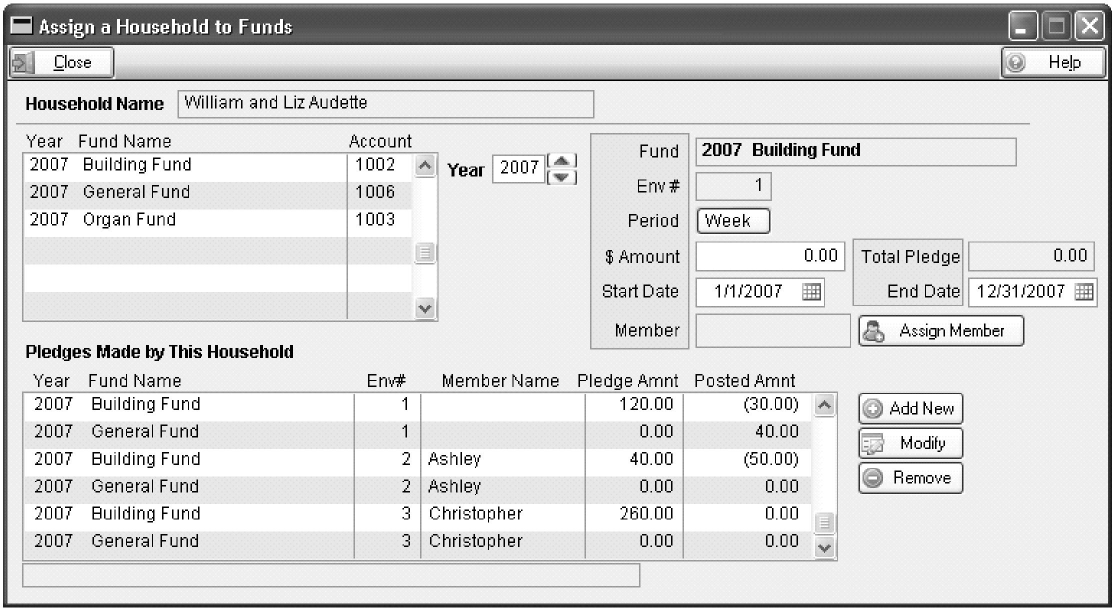
Phone Number

The household phone number for the alternate location. If the phone number is unlisted, click the **Listed / Unlisted** field following the phone number.

MapQwest

Use this button to display an online map and directions to the address listed on the Alternate Address form. The online map from www.mapqwest.com will require access to the Internet.

Pledges



The **Assign a Household to Funds** window should be used to enter pledge records for a selected household. To view funds from a different year, change the year value located in the middle of the window.

Pledges can be entered for an entire year, a partial year or for multiple years. These amounts are scaled appropriately for the period specified when preparing reports or printing statements.

To save time, when entering pledge records for several households use the **Record Pledge** button on the **Contribution Fund List** form.

To assign a fund and pledge amount to this family:

1. Select the fund from the list of funds displayed in the top scroll window. (select a fund by clicking on the fund name)
2. Enter the requested information for this pledge on the right side of the form. Press the **Assign Member** button to assign a pledge to a family member. Only members assigned an envelope number will appear in the scroll window.
3. Press the **Add New** button to complete this assignment

In addition to adding pledges, you may remove or modify an existing pledge from the list of pledges made by the family. Select a pre-existing pledge from the bottom scroll window. ***Revelations*** displays the pledge information on the right side of the form for modification. Make the changes and press the **Modify** button.

To remove a pledge, select the appropriate record from the bottom window and press the **Remove** button. A pledge entry can only be removed if no contributions have been posted to it.

Special Window Fields – Assign Household to Funds

Fund to select from

A scrolling list of all funds to select from when assigning a pledge to a family.

Pledges made by this Household

A scrolling list of all pledges that have been made by this family for the year selected.

Envelope #

A number (maximum of 6 digits) to assign to a household or member.

Period

If a household pledges $10 per week, select a period of ‘Week. The pledge amount will be multiplied by the number of Sundays in the pledge date range.

$ Amount

Amount of the pledge for each period. This field plus the "Period" field and the date range entered is used to calculate the ‘Total Pledge’ amount. The total pledge amount is the total amount of the pledge for the period specified.

Special Buttons – Assign Household to Funds

Add New

Select a fund from the top scroll window and enter the desired information on the right side of the form. Press the **Add New** button to add the new entry to the bottom scroll window

Modify

Select an existing entry from the list **Pledges made by this family** (at the bottom of the window). Modify the information. Press the **Modify** button to record your changes.

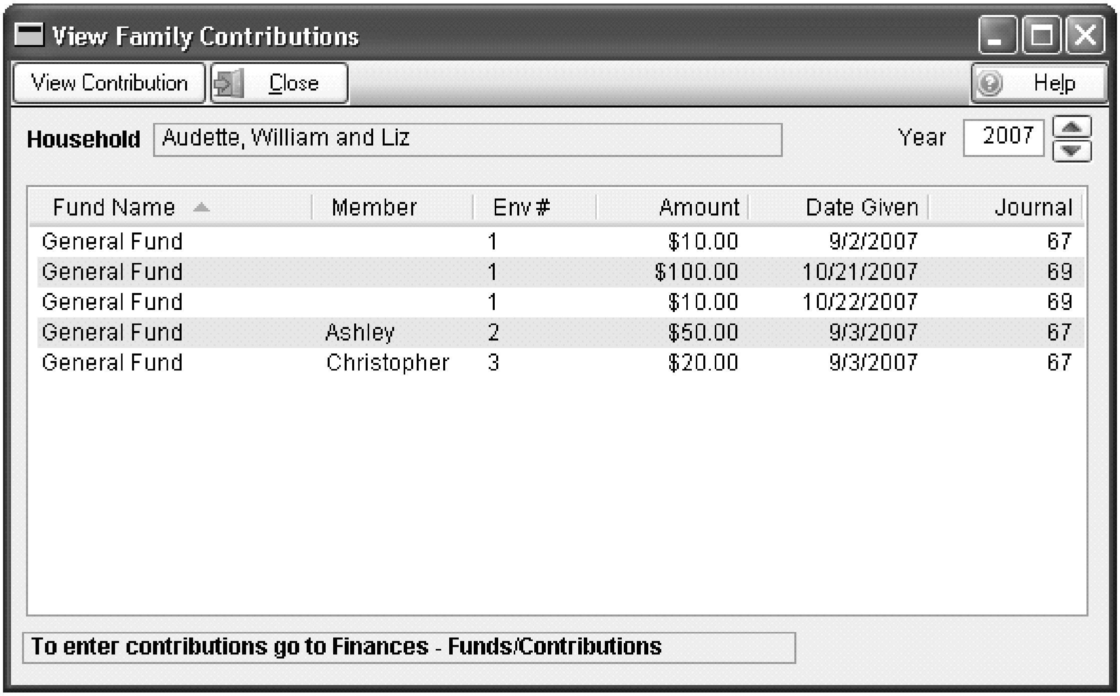
Remove

Select an existing entry from the list **Pledges made by this family** (at the bottom of the window). If there have been no contributions made to the selected fund, click the **Remove** button to delete the pledge record.

Assign Member

To assign an individual family member to a pledge (rather than the entire household), click the **Assign Member** button. The **Select Member** window is displayed with a list of family members that may be individually assigned to a pledge. The member must have an envelope number assignment before they will appear in the lookup window.

View Contributions



The **View Family Contributions** window is used to see all of the contributions for a particular family.

Special Window Fields – View Contributions

List of Family Contributions

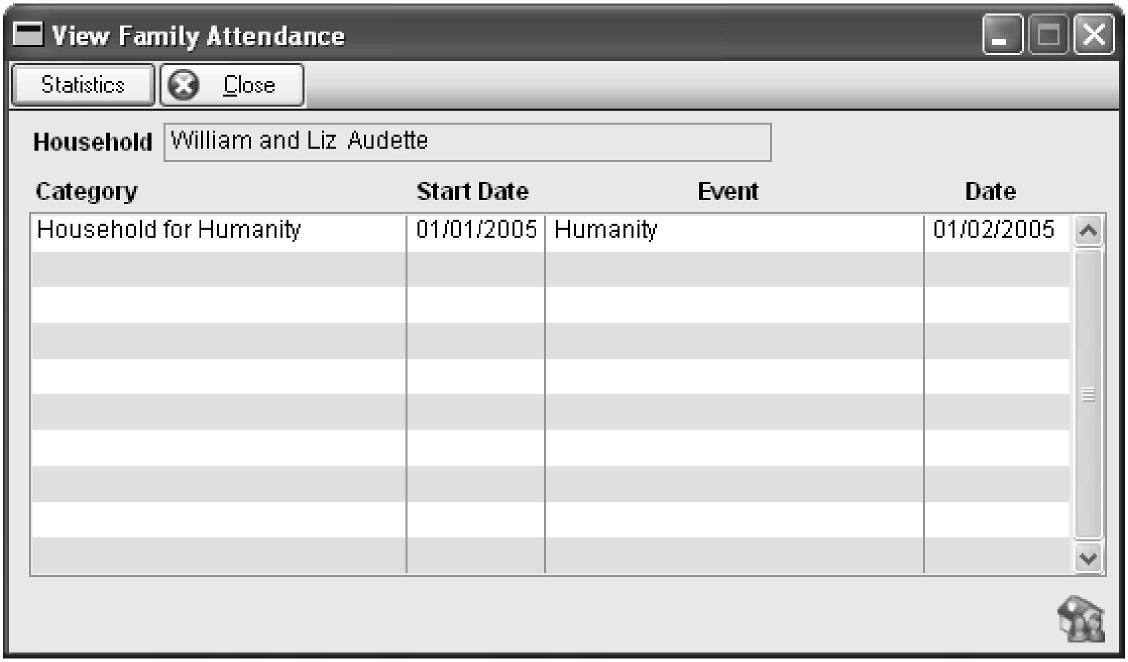
A scrolling list of all contributions made by a household. The list displays contributions in both summary and detailed formats. To see additional information about a contribution, double click a contribution or highlight a contribution then press the **View Contribution** button

Special Buttons – View Contributions

View Contribution

The **View Contribution** button may be used to display detailed view of a contribution. The detailed contribution view displays the batch posting details for each contribution.

View Attendance



This window displays the detailed attendance records for the selected household. Each of the attendance records is associated with a general attendance event and event date. To statistically view a summary of attendance for a specific attendance category, select an event and press the button **Statistics**.

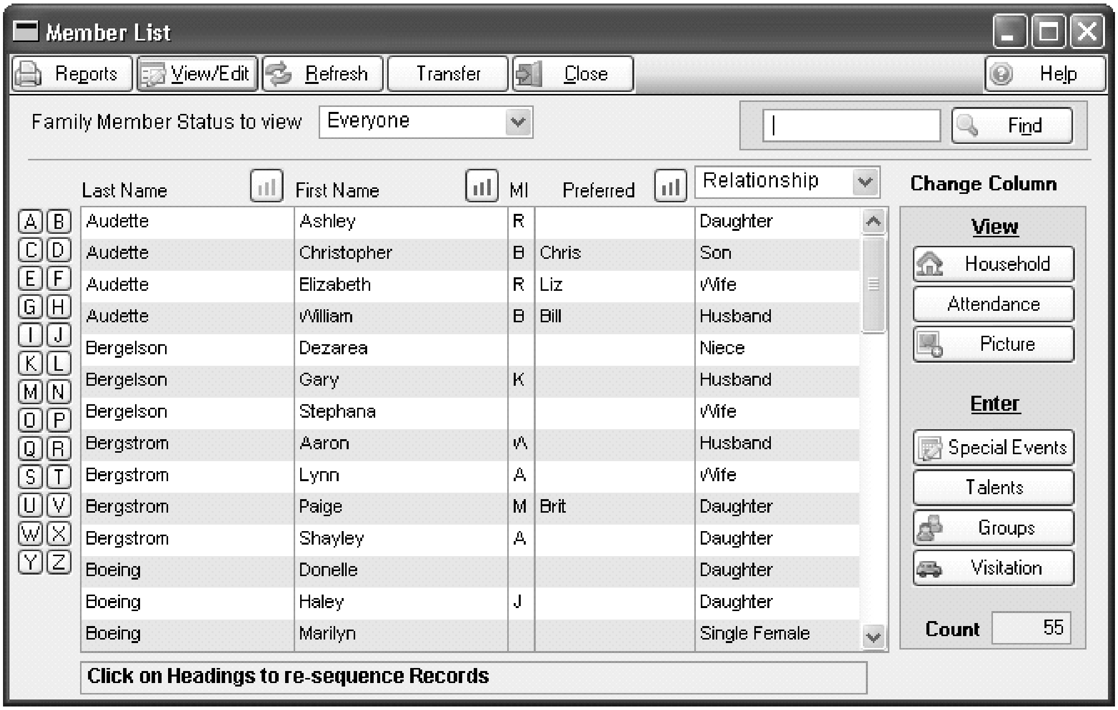
Special Buttons – View Attendance

Statistics

The **Statistics** button is used to display a statistical summary of attendance for a selected category. To view attendance statistics, select a particular event and click **Statistics**. The system displays the total number of events, the number attended by this household and the attendance percentage.

Family Members

Member List



The **Member List** window displays the list of members for the status selected at the top of the screen. The list can be sorted by last pressing the column header button on the scroll window. The default status to view in the scroll window can be changed from the **System Preferences** form.

To view detailed information about a member:

Select the member by clicking anywhere on the member record. Double clicking a record selects the record and activates the **View/Edit** button. Buttons at the right of the screen will take display information related to the selected member.

To find a member, scroll through the list of entries using the up/down scrolling arrows on the right side of the window, use the **Find** function or press the A – Z buttons to the left of the Member List.

Change Sort Order:

Clicking on the column headers on the scroll window will change the order the records are displayed in.

Select a View:

The contents of the member list can be restricted by the status codes selected. Note: New status codes can be added using the **System Preferences** form.

Special Window Fields – Member List

Last, First, Middle Initial

The name of the church member. Together, the last name, first name, and middle name must constitute a unique name in the database.

Special Buttons – Member List

Reports

The **Reports** button is used to access member-related reports. More member reports can be found by pressing the **Reports** button located on the Revelations menu bar.

View/Edit

The **View/Edit** button displays the detailed information associated with a selected member. A member is selected by clicking on the associated row in the Member List.

Transfer

The Transfer button displays the Transfer Member to New Household window.

The transfer function is typically used to move members from one household to another based on events such as marriage, adoption, etc.

Household

View the household information for the selected member.

Attendance

Group Attendance - View group attendance records for this member

General Attendance - View the general attendance at church events for this member.

Picture

Press this button to assign or view a member's picture.

Special Events

View or Edit special events in the church life of this member. Special Events include events such as baptism, marriage, etc.

Talents

Associate this member with a list of talents

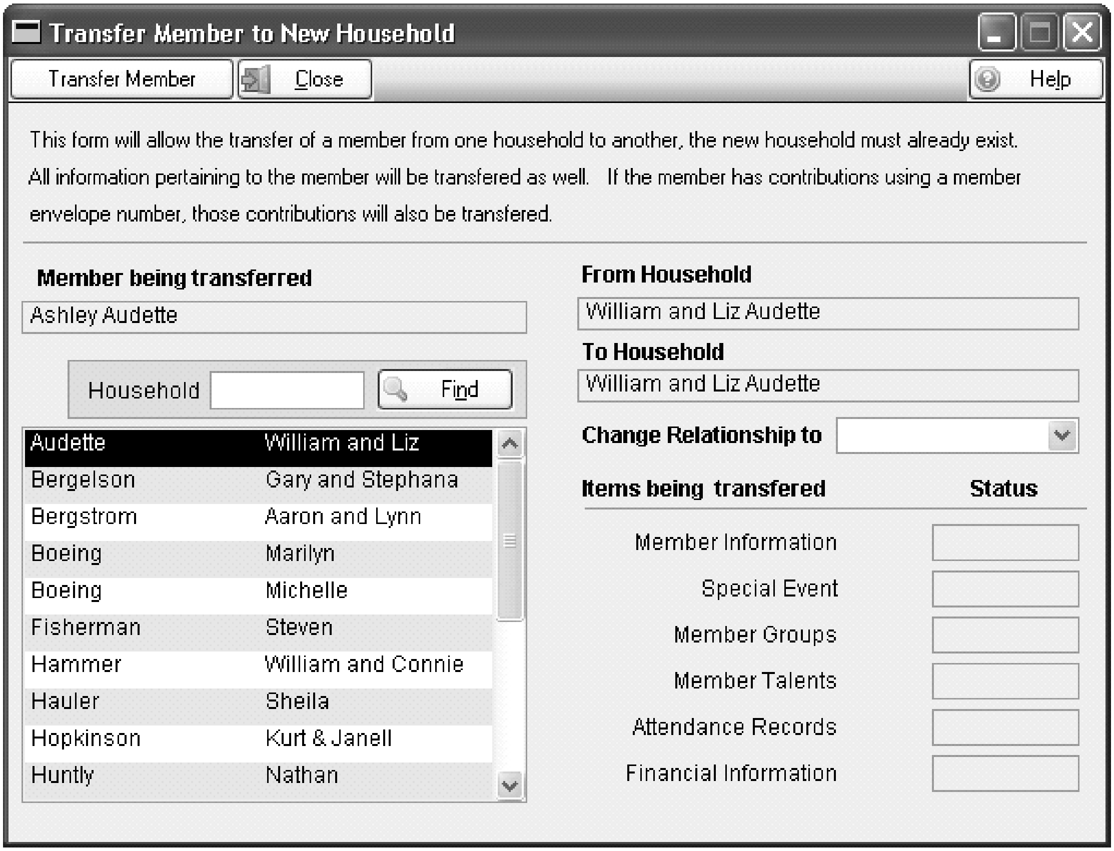
Groups

Assign this member to groups within the church.

Visitation

Used to record visitation information for the selected member.

Transfer Member to New Household



The **Transfer Member to New Household** window is used to transfer an individual and all their records to another household. This includes assigned groups, talents, events, contributions (if assigned to the member), etc. To transfer a member to another household, select the household (which must already exist) and press the **Transfer** button. The member (and all associated data) is immediately transferred to the selected household.

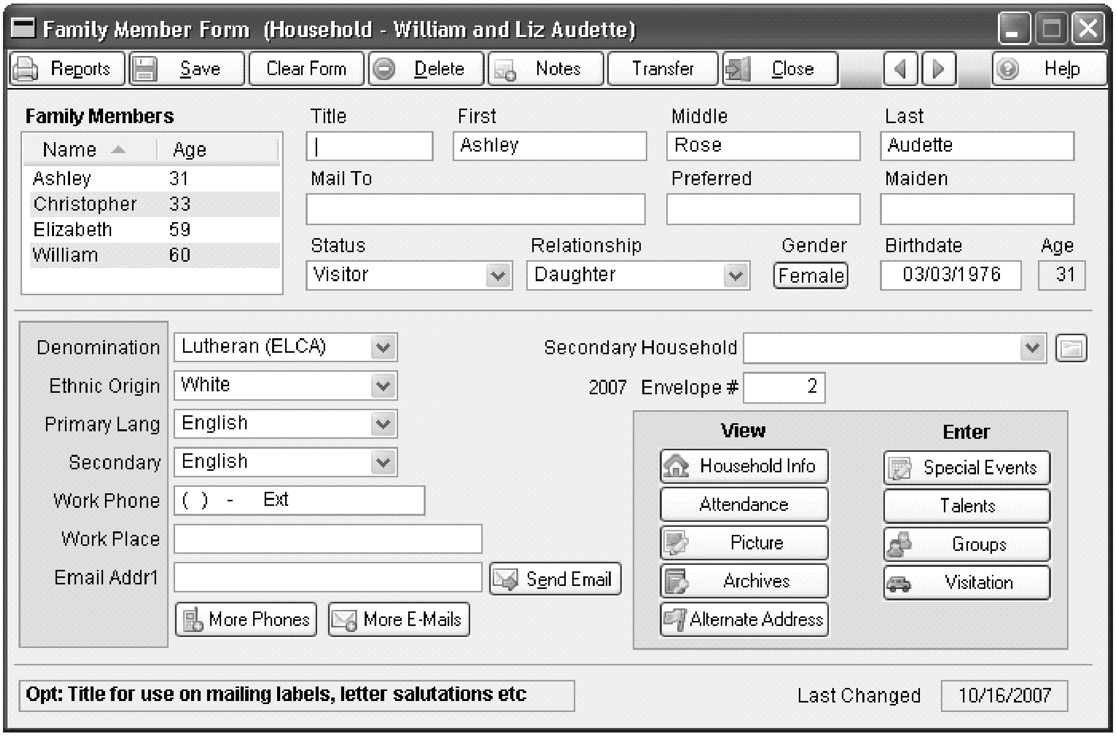
When a member is transferred to another household their contributions will not be transferred if they were contributing to a household envelope rather than to a member envelope. To transfer a household's contributions to another household or member go to **Finance – Contribution Maintenance**.

Special Buttons – Transfer Member

Transfer

Transfer the member to the selected household. All associated data for this member is also transferred.

Family Member Form



The **Family Member Form** is used to add or edit detailed information on members. Although this screen may be accessed from either the **Household** form or from the **Family Member List,** new members can only be added from an existing household form. To add a new member, select the household for that member and press the **Add New** button located below the **Member List** window. Once the member form is open, all the family members can be added.

If a member of a household moves to a new household, all the information for that family member can be transferred to the new household. Consult the 'Transfer Member to a New Household' section for detailed information.

Deleting Members

Changing a member status to **Delete** and then saving does NOT remove the record from the member file. BUT, clicking the **Delete** button does remove the record from the Member file. On this form the Delete button and Delete status are NOT the same thing.

Initializing Members

All of the data relating to a given member can be accessed using this one form. Select any one of the buttons at the right of the window to reference or to initialize member information.

System Setup

The **Family Member** form contains some drop down lists (ex; relationship) from which to make a selection. The contents of these drop down lists can be modified or added to from the **System Preferences** form. For information on how to add/modify items to these lists, see the section on **System Preferences**.

Window Fields – Member Form

Title

The person's title.

First, Middle, Last

First, middle and last name of the member. The last name can be different than that of the household. Together, these 3 fields must constitute a unique name in the database.

Mail To

When this isn't filled in, the first line of a mailing label is built by combining the title, first name, and last name. This is the line that, when present, is printed on member mailing labels.

Preferred

The preferred name or nick name for the selected member

Maiden

Maiden name for the member. Married and divorced women only.

Relationship

The relationship of this member to others in the selected household. Use the **System Preferences** form to add or modify entries.

Denomination

Religious denomination of this member. Use the **System Preferences** form to add or modify entries.

Ethnic Origin

Ethnic origin of the member. Use the **System Preferences** form to add or modify entries.

Language 1 / 2

Primary and secondary language for this member. Use the **System Preferences** form to add or modify entries.

Work Phone

Phone number to call when the member is away from home. Click on **More Phones** to enter additional phone numbers for this member.

Work Place

Place where the member can usually be found during the day.

Email

Enter a person email address for this member. Click on **More E-Mails** to enter additional Emails for this member.

Birthdate

Date of birth. A partial date can be entered. For ex: leave the last 4 digits equal to zero if the year isn't known. Obviously the age cannot be calculated in this case but it would still be possible to identify this person as having a birthday in a certain month.

Age

Calculated by Revelations based on the birth date entered. If the birth date entered does not have a year, month and day entered, this value will not get calculated.

Envelope #

Envelope number assigned to the Member. Assigning an envelope number to a member must be done from **Finance – Envelope Maintenance**.

More Phones

Up to 10 additional phone numbers can be assigned to a member. Go to 'System – System Preferences' to define the phone groups.

More Emails

Up to 5 additional Emails can be assigned to a member. Go to 'System – System Preferences' to define the Email groups.

Gender

Male/Female

Status

Status of the selected member. Use the **System Preferences** form to add or modify status entries. The first 4 status groups cannot be changed or removed.

Secondary Households

This field is used to include additional addresses of children with divorced parents. Press the lookup button located to the right of this field. A window will appear allowing you to select a secondary household. More than one household can be assigned.

Alternate Address

Display or enter alternate address information for the selected member. When an **Alternate Address** is entered, the system automatically switches between the household's primary address and the member's alternate address based on designated start/end dates. A green dot appears on the button when the address is active.

Special Buttons – Member Form

Delete

Physically removes this member from the database. The member will be removed from all groups and talents. Any visitation records to this member will be removed. Special event information will be removed. Contributions will remain on the system so fund balances will remain correct. Attendance records to events are not removed. Prior to removal a question will appear asking if you want to archive this members information. Respond yes to archive the information on the member form, the notes information and the member's special event information. Archived members can be un-archived. That is, they can be brought back into the database.

Notes

Opens a special **Notes** window for display and entry of detailed member information. Blue lines appear on the button when information is available.

Household

View the household information for the member.

View Attendance

Group Attendance - View group attendance records for this member

General Attendance - View the general attendance (at church events) for this member.

Picture

Press to assign a picture to this member or to view the member's picture. A photo icon appears on the button when a picture is assigned and a camera appears when no picture is assigned.

Archives

Displays a window showing any family members that have been archived. A member can be un-archived by selecting them from this window.

Special Events

View or Edit the special events in the church life of this member. Special events include events like baptism, marriage, etc.

Talents

Associate this member with a list of talents that he/she may use in their service to the church.

Groups

Assign this member to different groups (committees, work groups, etc) within the church.

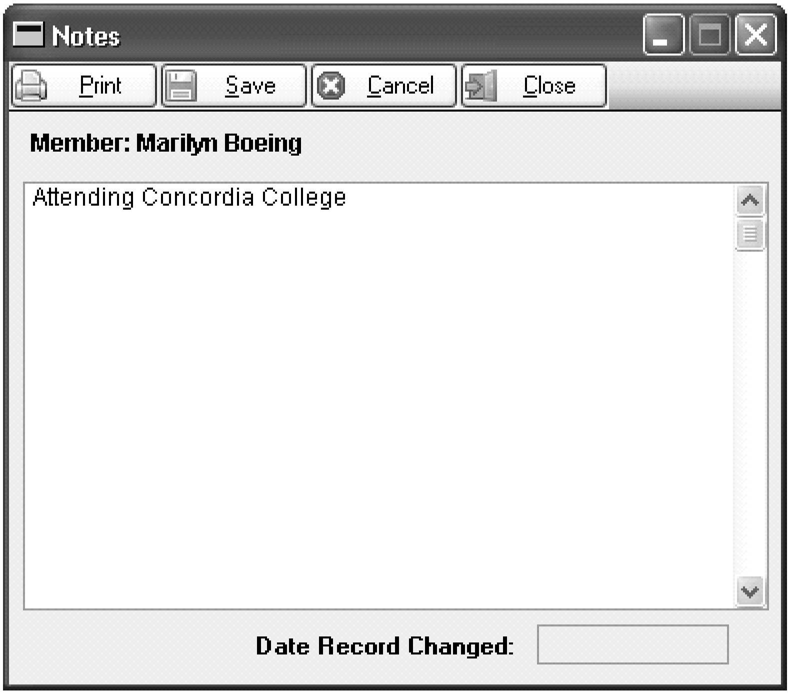
Visitation

Record or schedule visitation information for the selected member

Alternate Address

Display or enter alternate address information for the selected member. When entering an **Alternate Address,** the system automatically switches between the household's primary address and the member's alternate address based on designated start/end dates.

Notes



The **Notes** window is used to record detailed notes for households and members. Red lines will show on the Notes button.

Special Window Fields – Member Notes

Notes

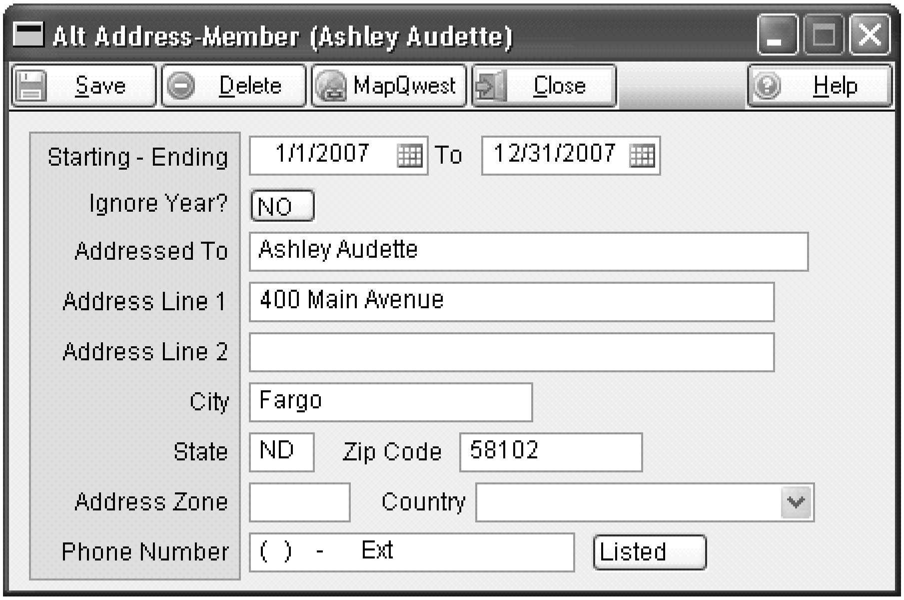
The note entry/viewing area on the window appears as a large white box. To enter or edit a note, click in the white typing area and edit/enter text as you desire. To completely remove all the information from a note, highlight the information to be removed and press the **Delete** key on the keyboard. Then press the **Save** button. Notes are limited to 5000 characters.

Special Buttons - Member Notes

Cancel

Press **Cancel**, to cancel the changes to the Notes window. Any notes that were entered and saved previously are retained, with only new text being removed from the window.

Alternate Address for Member



Alternate Household vs. Member Addresses

Revelations stores both household and member alternate addresses. The **Alternate Address** button on the **Family Member** form is used to record address changes for an individual member, such as a college student. The alternate member address is date sensitive.

The **Alternate Address** button on the Household Form is used to specify an alternate address for a household.

Special Window Fields – Alternate Address

Starting – Ending

Enter the starting and ending dates for which the alternate address will be active. The member alternate address is defined for members that reside at more than one address over the course of a year.

Ignore Year?

If a member typically repeats their move from the primary to the alternate address year after year, then set **Ignore Year** to “Yes. If the move to an alternate address will not be repeated, then set **Ignore Year** to “No.

Addressed To

Defines the mail to name on the Address Label.

Phone Number

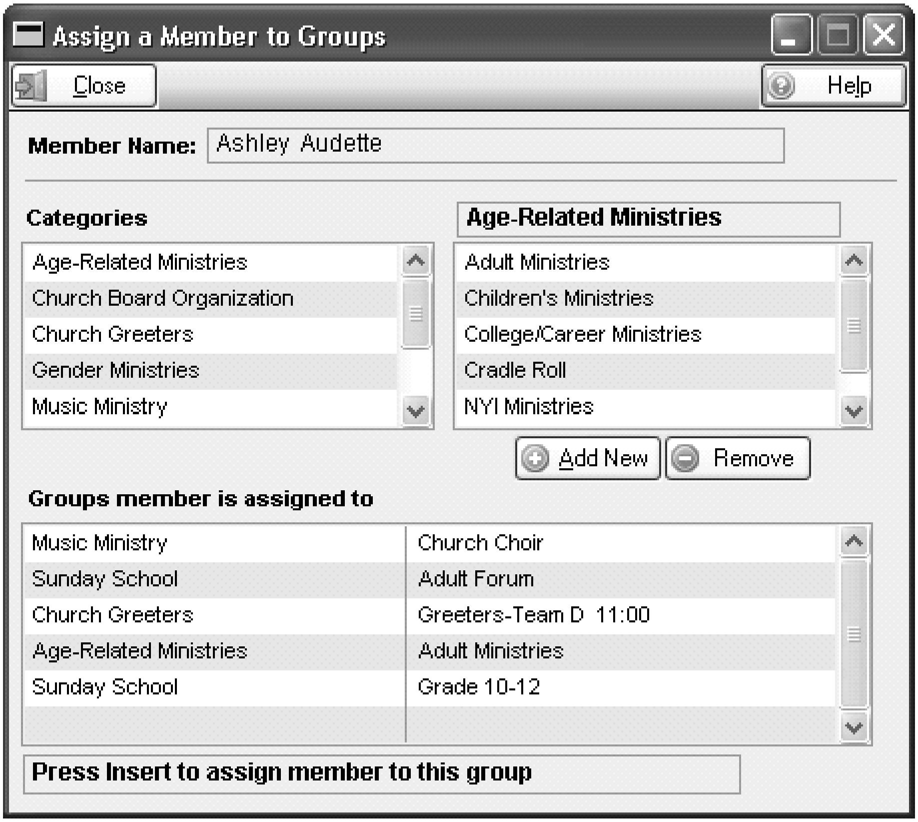
The members phone number for the alternate location. Click on the **Listed / Unlisted** field following the phone number to change the listed status.

Special Buttons – Alternate Address

Delete

Deletes the alternate address for this member.

Assign a Member to Groups



The **Assign a Member to Groups** form is used to assign a member to one or more existing groups.

Select the desired group category from the top left scroll window and then the desired group from the top right scroll window. Press the **Add New** button to complete the assignment.

To remove an assignment, select the group from the bottom scroll window and press the **Remove** button.

When making a large number of group assignments it is faster to do it from the Groups module. Select **People – Groups Members** or **Groups Households**. New groups and group categories are added using these forms.

Special Window Fields – Member to Groups

Categories

List of all group categories in the church.

Groups for Category selected

List of all groups belonging to the group category selected. For ex: a group called ‘Men’s Choir’ could belong to a group category called ‘Church Choirs’.

Groups member is assigned to

List of all groups the member participates in.

Special Buttons – Member to Groups

Add New

Select a group category and group and click the **Add New** button to assign the member to the group.

Remove

Select a group from the bottom scroll window and click the **Remove** button to remove the member from the assigned list.

Assign a Member to Talents

The **Assign a Member to Talents** form is used to assign a member to one or more talents. Talents are a subset of talent categories.

Select a 'Talent Category' and then the 'Talent' within the category. Pressing the **Add New** button will move your selection to the bottom scroll window **Talents assigned to member**.

To remove a talent assignment, select the talent from the bottom scroll window and press the **Remove** button.

Special Window Fields – Member to Talents

Categories

List of all talent categories in the church. Ex: ‘Music’ could be a Category

Talents for Category selected

List of all talents belonging to a talent category. Ex: ‘Piano players’ could be a talent belonging to the talent category ‘Music’.

Talents assigned to member

List of all talents associated with the selected member.

Special Buttons – Member to Talents

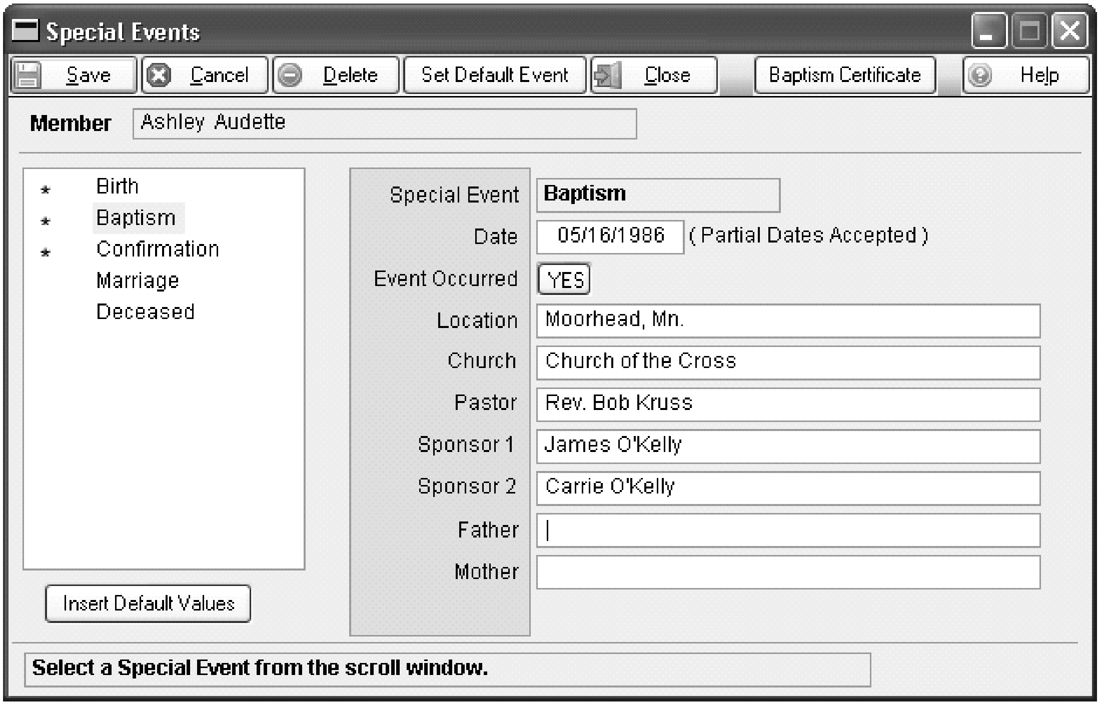
Add New

Select a talent category and talent. Then click the **Add New** button to assign the talent to the member.

Remove

Select a talent from the bottom scroll window. Then click the **Remove** button to remove the member from this talent.

Special Events



The **Special Events** window is used to record information for all of the special dates in a member's religious life. ***Revelations*** is already setup to record information for the following events: Birth, Baptism, Confirmation, Marriage, and Deceased. To enter information for any one of these events, select the name of the special event. The information displayed on the right hand side of the window can be entered or updated to accurately record the special event data. An asterisk appears to the left of the special event name when a date has been entered for the event.

Use the Special Events Setup window found on the **System Preferences** form to modify the information type for an event or to add new events. We recommend that the names of the first five events do not change as they are assumed by ***Revelations*** to be in their existing locations.

Partial Dates

The date field will allow the entry of an incomplete date. For ex: if the year isn't known leave the last 4 digits equal to '0000'.

Special Window Fields – Special Events

Names

A list of all defined special events. The list of special events can be modified using the Special Events Setup window.

Special Event

The data fields listed under **Special Event** are available to record detailed information for each special event. Some of the information that can be recorded for special events includes:

Date of the event

Location of the event (City, State)

User defined field # 1

User defined field # 2

User defined field # 3

User defined field # 4

Special Buttons – Special Events

Cancel

Click the **Cancel** button to void any changes.

Delete

Use the **Delete** button to remove the special event information for the selected event.

Set Default Event

The **Set Default Event** button sets the Special Event that appears when this window is opened. To change the default, select the desired event by clicking on its checkbox. Then click the **Set Default Event** button.

Insert Default Values

The **Insert Default Values** button inserts default values into the fields for the special event selected. The default values for each special event can be modified using the Special Events Setup window.

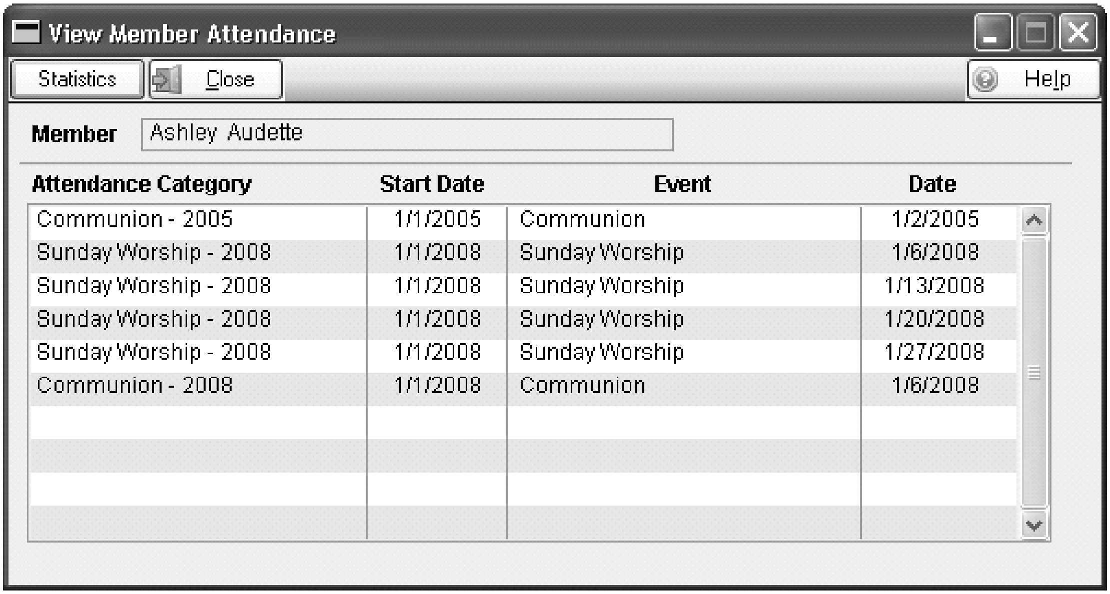
Copy to Spouse

Use the **Copy to Spouse** button to copy the marriage event information to the appropriate spouse.

Baptism Certificate

Use the **Baptism Certificate** button to print a baptism certificate for the member.

View Attendance



There are two options to this button: View attendance for group events or view attendance to church wide events (General Attendance categories). Select the desired option.

Each of the attendance records is associated with an event and event date. To statistically view a summary of attendance for a specific church or group category, select an event and press the **Statistics** button.

Special Window Fields – View Attendance

List of Events

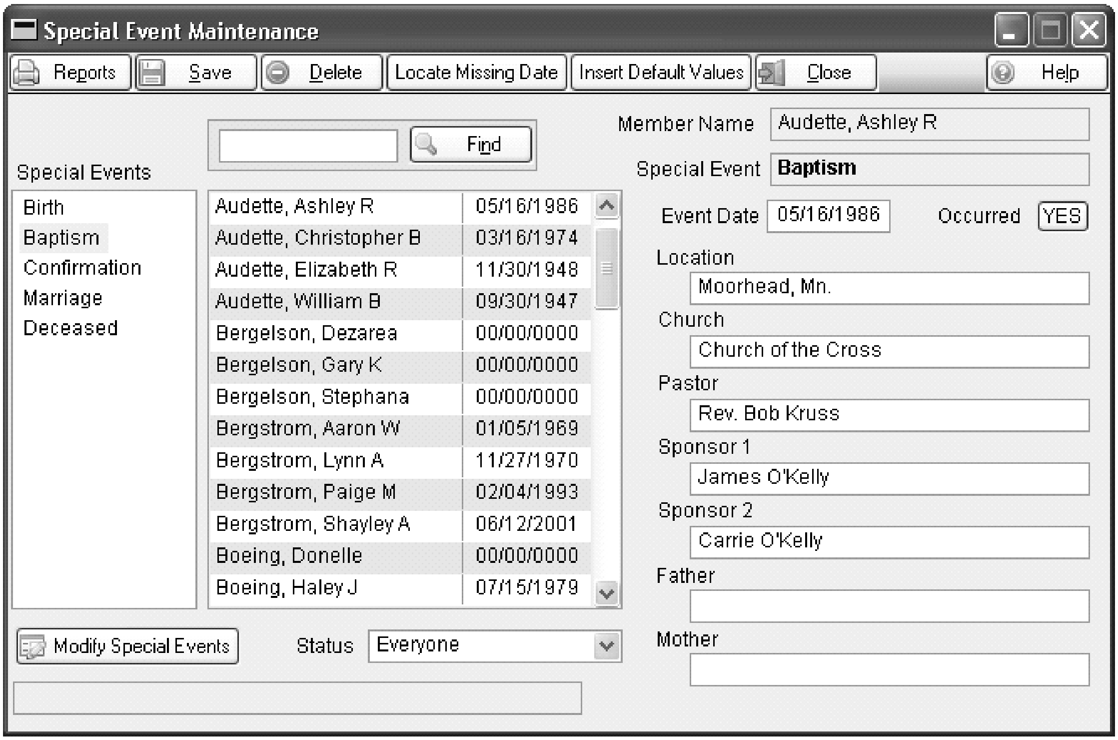
A scrolling list of all events attended by the member. To view attendance statistics, click on an event and then click the **Statistics** button at the top of the window.

Special Buttons – View Attendance

Statistics

The **Statistics** button displays a statistical summary of attendance for a selected event. To view attendance statistics, select a particular event and click **Statistics**. The system displays the total number of events, the number attended by this member and the attendance percentage.

Special Event Maintenance



Use this form to update special events for several members. To operate, select the special event in the left scroll window, select a member, enter the information on the right side of the window and press the **Save** button.

The special event fields that display are dependant on the event selected. To add or remove fields that define an event press the button **Modify Special Events**.

Special Buttons – Special Event Maintenance

Locate Missing Date

Pressing this button results in the program searching for members missing a date for the select event. When it finds one it stops and displays the member. Press the button again to continue searching for the next member missing a date.

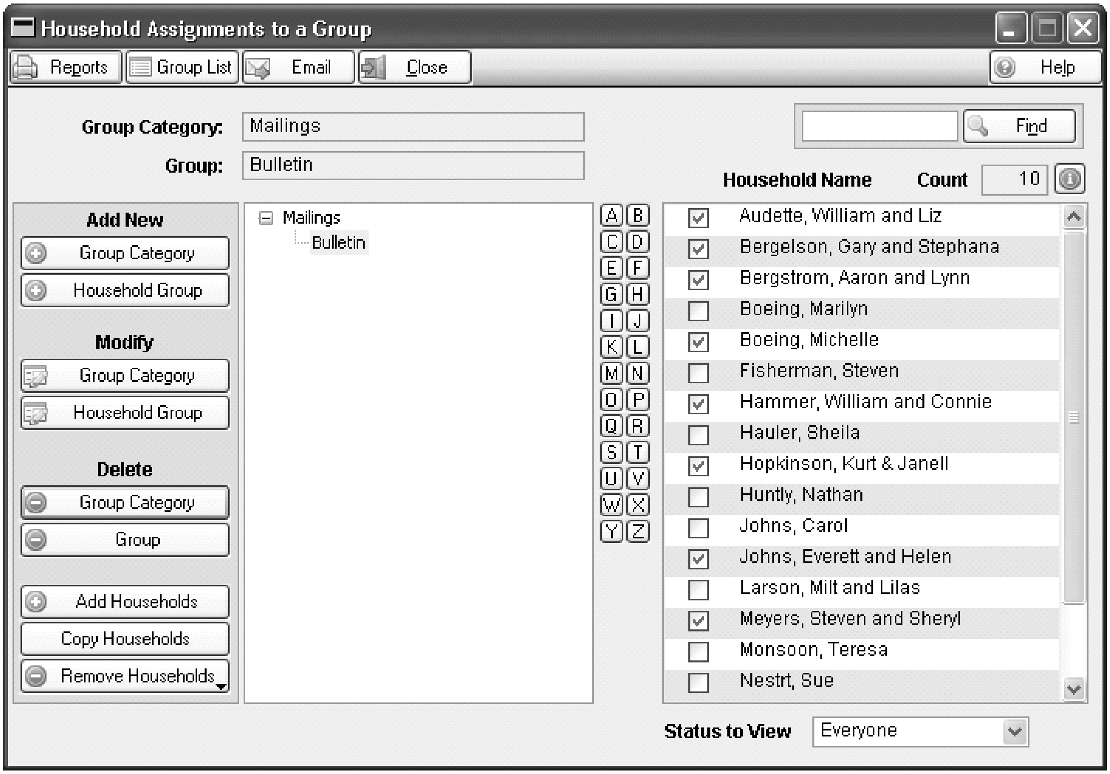
Modify Special Events

Revelations comes with five pre-defined special events however the system can accommodate 10 events. Pressing this button allows an event to be modified or added. We strongly recommend that you do not change the sequence of the pre-defined events or their intended purpose as ***Revelations*** expects those events to be in the existing sequence. The fields defined for any event can be modified according to your needs.

Insert Default Values

The **Insert Default Values** button inserts default values into the fields for the special event selected. The default values for each special event can be modified using the Special Events Setup window.

Household Groups



Household groups lets you create groups of households. One of the more popular uses of this feature is for the creation of mailing lists. For ex: Create a group category of 'Mailing Lists' and then create any number of mailing list groups.

Households can be copied into a selected group from another group or from a General Attendance event provided the General Attendance Category is tracked by household. Click the **Copy Household** button on the menu bar to select the group or General Attendance event to copy from.

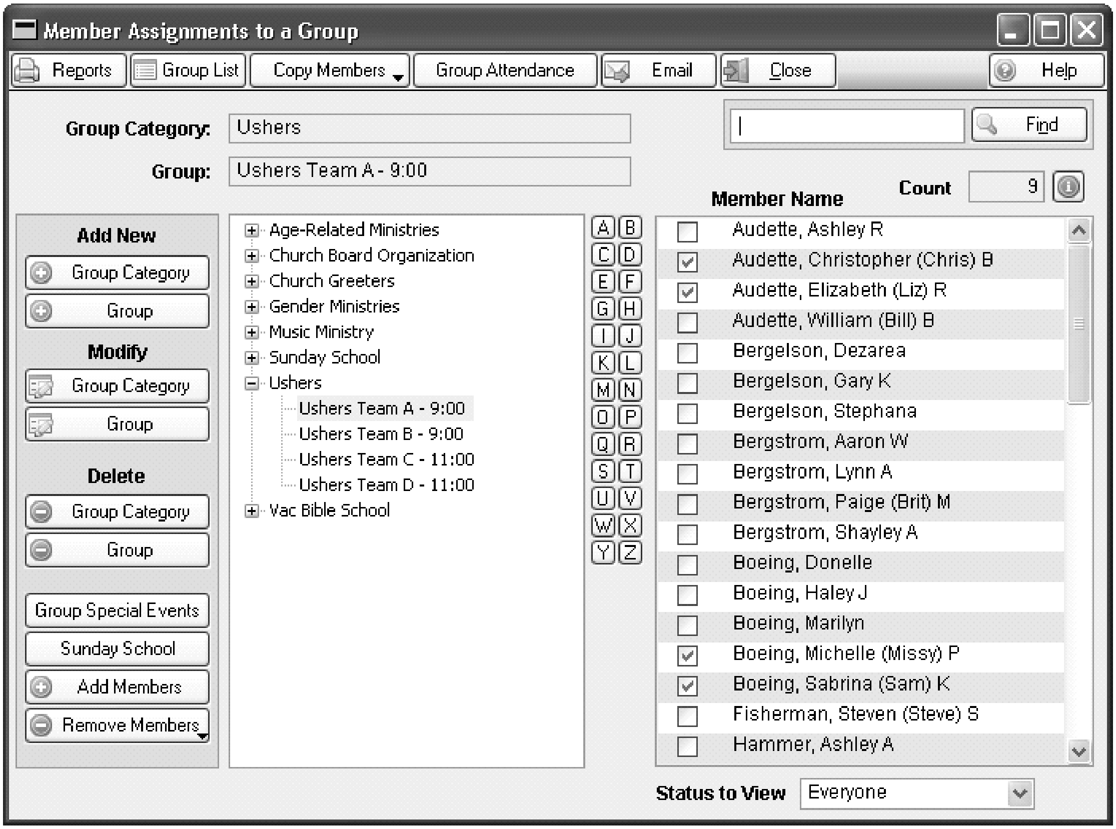
Press the **E-Mail** button to send an email to every household belonging to the selected household group.

Using the **Add Households** button, one can add all active households within a given status date.

Household groups functions exactly the same as member groups with the exception that household groups does not allow for the definition and tracking of events. Please refer to **Member Groups** for screen functionality.

Member Groups

Member Assignments to a Group



The **Member Assignments to a Group** window is used to add or edit a list of groups that have been defined. Groups are a subset of Group Categories. For ex: you could have a group category called ‘Church Choirs’ with two groups. One called ‘Men’s Choir’ and another group called ‘Women’s Choir’. There is no limit to the number of categories or groups that can be defined.

When the plus sign to the left of a group category is clicked, all its associated groups appear indented below the category. Members can be added to a particular group by selecting the group and pressing the checkbox to the left of the member in the right scroll window. To work with a particular status group, set the status box located below the right scroll window.

The name of a group category or group can be changed at any time - even after members are assigned. For ex: at the end of your school year you could move all the students in the group called ‘First Grade’ to a group called ‘Second Grade’ just by changing the description of ‘First Grade’ to ‘Second Grade’.

Group Attendance

Group events and attendance to those events can be managed by selecting a group ad the pressing the Group Attendance button. How to use this form is explained in the following pages. Note that group events and group scheduling are not the same thing. Go to People – Scheduling - Event Scheduling for an explanation of scheduling groups

Special Window Fields – Assign Members to a Group

Group Categories

When the form first opens the left scroll window will be filled with any existing group categories. Press the plus (‘+’) sign to open a category and view its assigned groups. Select a category by clicking on its name.

Group List

A group list is seen when the plus (‘+’) sign next to a category is clicked. Select a group by clicking on its name.

Special Buttons – Assign Members to a Group

Group Category

Press the **Group Category** button below the **Add New** prompt to display the **Group Category Maintenance** form. Type the name of the new category on this form and click **Save.**

To modify a group category, first select the category in the scroll window and press the **Group Category** button below the **Modify** prompt. Modifying a category has no effect on any groups.

To delete a group category, first select the category in the scroll window and press the **Group Category** button below the **Delete** prompt. Deleting a group category will remove all groups, events and members attending events to this category.

Group

Press the '+' sign to the left of the group category to display the groups belonging to it. Then select a group by clicking on the group itself.

The group buttons on the left side work the same as the Group Category buttons. See above for instructions on their use.

Group Attendance

Group events can be attached to any member group. Once an event is created, attendance can be performed. Select a group and press the Groups Events button.

Copy Members

Members assigned to another group can be copied into the selected group. Select the group you want to copy members into and press the **Copy Memers** button. A pop-up window will appear. Select the group from which the members will be copied from.

E-mail

This opens a window that is used to prepare and send an email to all members of the selected group. Using this same window, labels can be printed for members having email, not having an email address or all members. Instructions for each field on this form appear in the bottom half of the form when the field gets focus.

Remove Members

When the button is pressed three selections are presented. The first will remove all members by status from the selected group, the second option will remove all members from the selected group and the third option will remove all members from the selected group category.

Group Maintenance

This window is accessed using the **Group Modify/Delete** buttons on the **Member Assignment to Groups** window. Use this window to add new groups or to modify a group name.

The group description can be modified without affecting member assignments. For ex: Students in 'grade 5' could be advanced to 'grade 6' by changing the description of the 'grade 5' group to read 'grade 6'.

Group Name

A 30 character name describing a group belonging to a group category

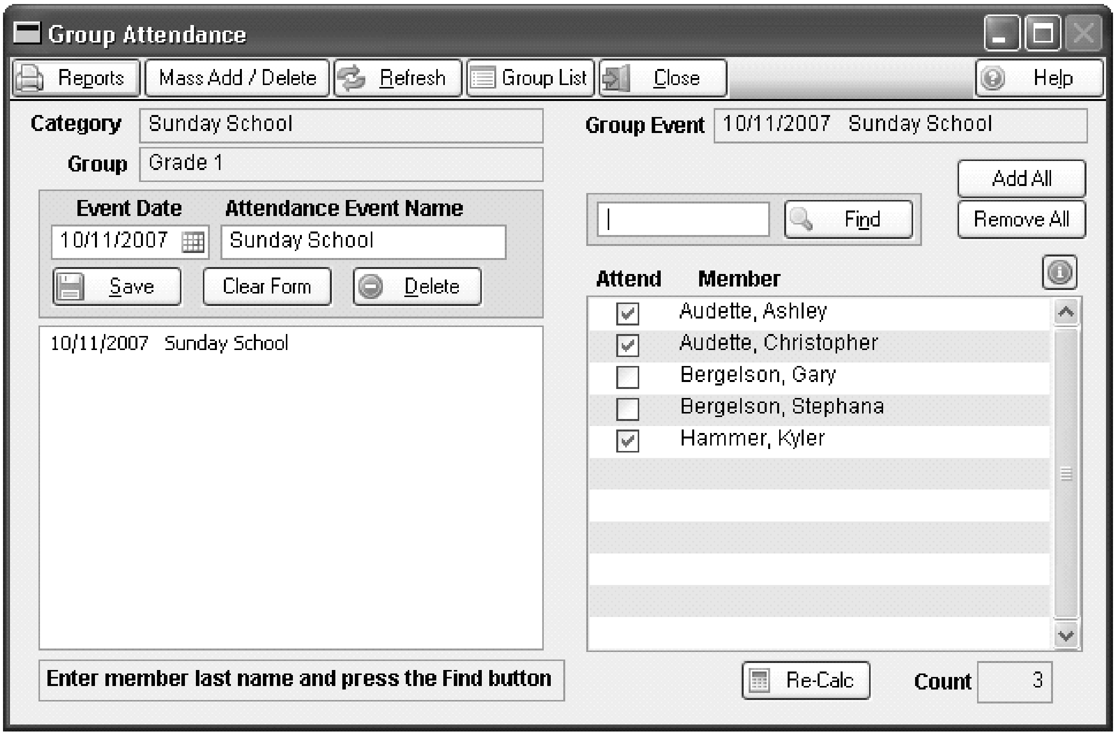
Description

Additional information about the group can be entered here.

Group Special Events

This opens a window that is used to add special event dates to a group of members. For ex: Adding a confirmation date for all confirmation students, without having to go into each individual separately.

Group Events



The **Group Events** window is used to create a new event or select an existing event for attendance tracking. After selecting an event, use the right scroll window of members to record attendance. Each event has an associated date.

A roll call report can be prepared prior to an event by printing the **Roll Call** report. Go to **Reports : Membership Reports : Groups** and select **Prepare Roll Call to an Event**. Reports of attending members or of members missed can also be prepared.

Attendance assigned to an event is not affected when the name or date of the event is modified.

Assigning all members at once

When the majority of members attend an event it is faster to do the assignments by clicking the **Add All** button and then removing the members that didn't attend.

Special Window Fields – Group Events

Date

Date on which a group event occurs.

Event

Name of the event associated with the date. Duplicate names are allowed provided the name plus the date is unique.

Special Buttons – Group Events

Mass Add / Delete

Opens a window which allows you to quickly create a series of events over a specified period of time or to delete a group of events over a specified period of time.

List

Opens a window showing only the members attending the selected event.

Add All

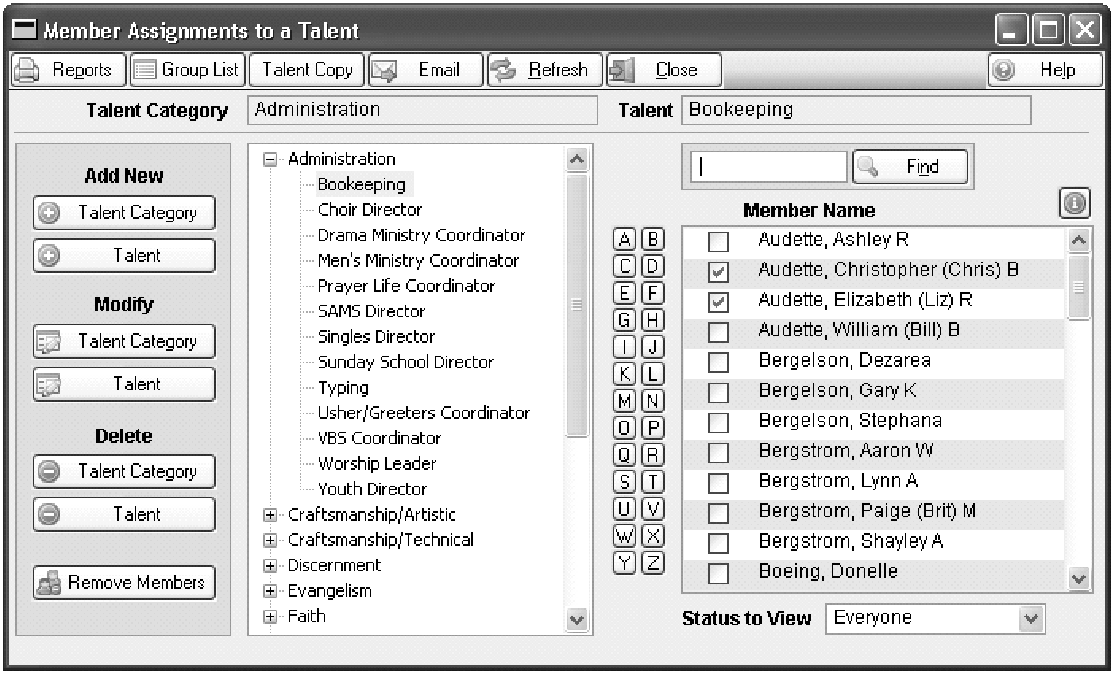
Mark all the members assigned to this group as having attended. This is useful when the majority attend. After pressing this button, you can unselect the few who missed the event.

Remove All

Unmark all the members of the group for this event.

Member Talents

Member Assignments to a Talent



The **Member Assignment to Talents** window is used to assign individual members in the church to a selected talent(s). Use the 'Status to View' dropdown at the bottom right of the window to select the status group to work with.

When the form opens the Talent Categories, if any exist, will be displayed in the left scroll window. Click on the '+' sign to the left of the category to view any defined talents to the category. After selecting a talent the scroll window on the right will be filled with all the members assigned to the selected status. Members already assigned to this talent will have their checkbox checked. To see a list of just the members assigned to this talent, press the **List** button on the menu bar.

If two members with the same name exist, select one of the member records and press the **Min-Max** button to the right of the **Find** button. A small window will appear providing additional information about the selected member.

Assign a member by checking the checkbox to the left of the name. This can be done with the mouse or by pressing the spacebar when the checkbox has focus. Move up or down through the list by using the up and down arrows on the keyboard, by using the scroll bar, or by using the **Find** box.

The **Talent Copy** button is used to transfer all the members associated with another talent to the selected talent. To perform a talent copy, first select a talent from the left scroll window and then press the **Talent Copy** button. The **Talent Category & Name Lookup** window is displayed. Select a talent category and talent. Click the **Select** button to copy all of the associated members from the lookup window to the selected talent displayed on the **Member Assignment to Talents** window.

Special Window Fields – Member Assignments to a Talent

Available Member List

A list of all church members associated with the status selection in the drop down box

Add/Remove Checkbox

Indicates whether the member is part of this talent group

Special Buttons – Member Assignments to a Talent

Talent Category

Press the **Talent Category** button below the **Add New** prompt to display the **Talent Category Maintenance** form. Type the name of the new category on this form and click **Save.**

To modify a talent category, first select the category in the scroll window and then press the **Talent Category** button below the **Modify** prompt. Modifying a category has no effect on any talent assignments.

To delete a talent category, first select the category in the scroll window and then press the **Talent Category** button below the **Delete** prompt. Deleting a talent category will remove all talents assigned to this category and all the members assigned to the talents.

Talent

Press the '+' sign to the left of the talent category to display the talents belonging to it. Then select a talent by clicking on the talent itself.

The talent buttons on the left side work the same as the Talent Category buttons. See above for instructions on their use.

List

Opens a window displaying only those names that are assigned to this talent.

Min/Max View

Click the **Min/Max View** button to display detailed information for a selected member.

Talent Maintenance

The Talent Maintenance window allows you to create or edit talents. Access this form by pressing the **Talent** buttons on the Member Assignments to a Talent window.

The description of a talent may be changed even after church members have been assigned to it.

Special Window Fields – Member Assignments to a Talent

Talent

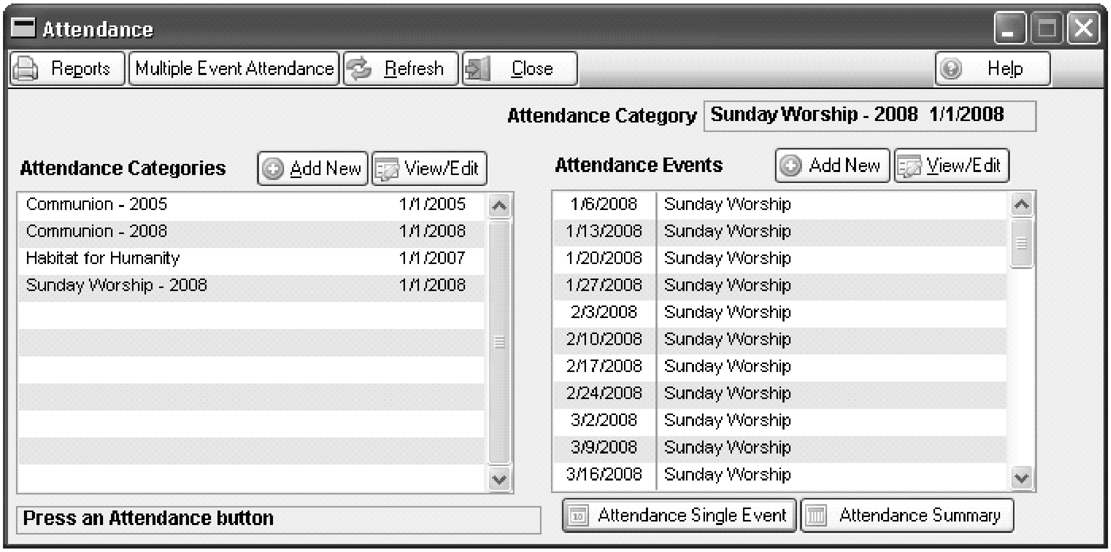
The specific talent name.

Description

Provides additional description of the talent.

General Attendance

Attendance



The **Attendance** window is used to add or edit a list of events for which the church membership participates. Attendance to a church event can be tracked by **Summary** (head count), by **Household** (number of households attending), or by **Member** (each member is identified). Use the buttons at the bottom of the window to assign attendance to one or more selected events. Select **People – General Attendance** to open this window.

To create an **Attendance Category** (ex: Sunday Worship), press the **Add New** button above the window **Attendance Categories**. After an Attendance Category is created, one or more events can be defined by pressing the **Add New** button above the window **Attendance Events**. Attendance can then be performed using one of the buttons at the bottom of the window.

When a household or a member is removed from the database they will NOT be removed from these files as that would affect the historical accuracy. Deleted members will NOT appear on any mailing label run but they will appear on attendance reports.

Archiving an Attendance Category

When an attendance category is deleted a question will be asked if you want to archive the information. Responding ‘Yes’ will save the category name, the total number of events and the number of times each person or household attended.

Multiple Event Attendance

Attendance can be assigned to as many as 3 events at the same time. A common use is communion and Sunday worship. Since everyone going to communion had to attend Sunday Worship attendance can be done at the same time. Press the button **Attendance – Multiple Events** to take advantage of this feature.

Special Window Fields - Attendance

Attendance Categories

A list of all attendance categories. Click the **Add New** button to create a new attendance category. The category description can be changed at any time without affecting the attendance events assigned by selecting the category and press the **View/Edit** button.

Attendance Events

The list of specific events within a selected category. To create a new event, select the appropriate event category and click the **Add New** button above the events list. The Attendance Events Maintenance window is used to edit and add new events. The event description can be changed at any time without affecting any households or members assigned.

Special Buttons - Attendance

Add New

The **Add New** button appears twice on this window. In each case the **Add New** button is used for the same function; to add either a new attendance category or a new event.

Clicking the attendance category **Add New** button, displays the Attendance Category Maintenance window. Add a new Attendance Category by typing the name of the new category and click **Save.**

Clicking the event list **Add New** button, displays the Attendance Events Maintenance window. Add a date and an event name and press the **Save** button.

View/Edit

A category or event can be modified or deleted by selecting the item and then pressing the **View/Edit** button above the window. When a category is deleted, all associated events as well as members assigned to the events are also deleted.

Attendance Single Event

Record attendance to the event selected in the **Attendance Events** window.

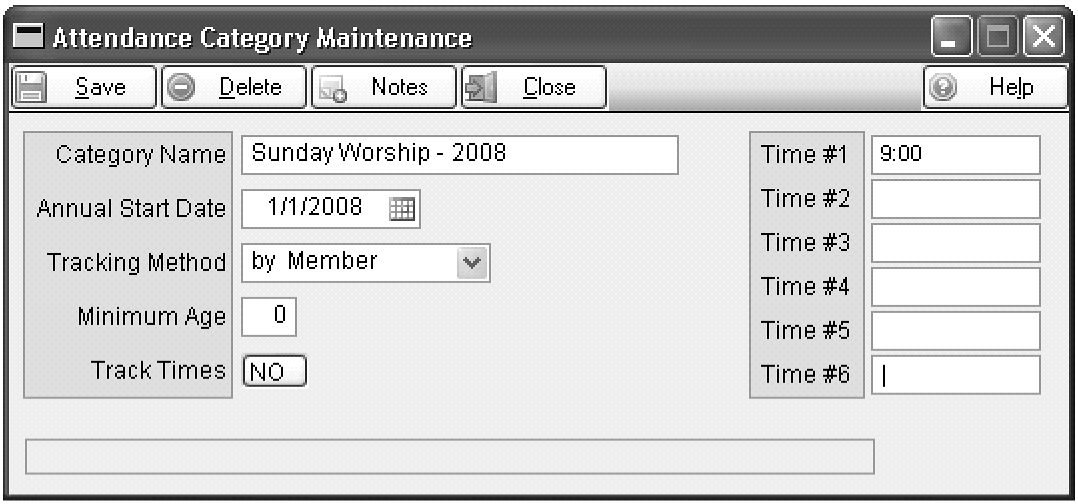
Attendance Multiple Events

Use this option to simultaneously record attendance for up to 3 different events at the same time.

Attendance Summary

Record attendance by head count rather then by individual names

Attendance Category Maintenance



This window is accessed using either the **Add New** or **View/Edit** buttons on the Attendance window above the left scroll window. A category can be added, modified or deleted from here.

Attendance Categories represent church wide events such as communion or Sunday service. Attendance for activities such as church choir would occur in the Group section of Revelations because the choir is a small subset of the church. Attendance can be tracked by households, by family members or in summary format. Once a tracking method has been selected and attendance performed, the tracking method cannot be changed. A tracking method of 'Summary' can be changed at a later date. Save your entries by clicking the **Save** button.

Special Window Fields – Attendance Category Maintenance

Category

Enter the name of an event category. A good example of event categories and event times is shown below:

Event Category Sunday Services

Event Times 9:00 am

Annual Start Date

The first date on which the event will occur. Usually this is the first day of the year.

Tracking Method

Track attendance using one of the following three methods. Once selected and attendance is recorded, this selection cannot be changed.

Summary: Use this method to track simple attendance statistics (number of people attending) where additional detail of either household or member names is not required. Tracking by summary can be changed to 'by household' or to 'by member' at any time.

By Household: Use this method to track attendance by household name.

By Member: Use this method to track attendance by member name.

Minimum Age

When the tracking method is by member the selection of names can be restricted to members exceeding the minimum age. Keep in mind, if you set a minimum age, members without birthdates will not be shown.

Track Times

When 'Track Times' is set to 'Yes', Revelations tracks attendance by the various times entered in **Time #1** through **Time #6**. This feature has no value when a single time value is entered.

Time #1 … #6

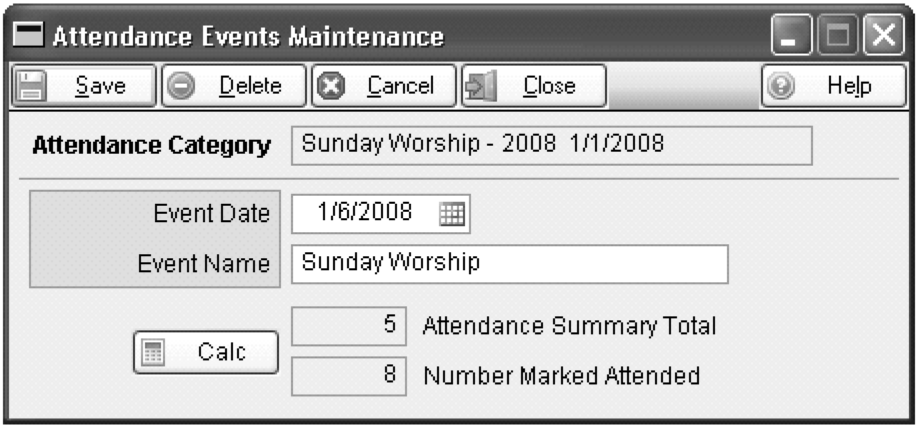
The times entered into time slots #1 through #6 define the times at which the associated event(s) occur. If there is more than one event within a given event category, the system will allow the recording of summary level information for each specified time slot. Setting **Track Times** to 'Yes' provides the ability to obtain statistics information by time of day.

Special Buttons – Attendance Category Maintenance

Delete

Click **Delete** to delete the currently selected event category. When an event category is deleted, the system will also remove all attendance records attached to the event category.

Attendance Events Maintenance



The **Attendance Events Maintenance** window allows you to create, edit or delete specific events. This window is accessed using either the **Add New** or **View/Edit** buttons on the Attendance window above the right scroll window.

An example of an event would be Sunday Worship. Only one event should be entered for each day. Use the **Time** # feature on the **Attendance Category Maintenance** form to track information for multiple times in the same day.

Special Window Fields – Attendance Events Maintenance

Date

The date on which an event occurs.

Name

Name of the event. The name can be modified at any time, even after attendance has been entered.

Attendance Summary Total

This field is for reference only and reflects information currently entered for this event when the tracking method is “by Summary”.

Number Marked Attended

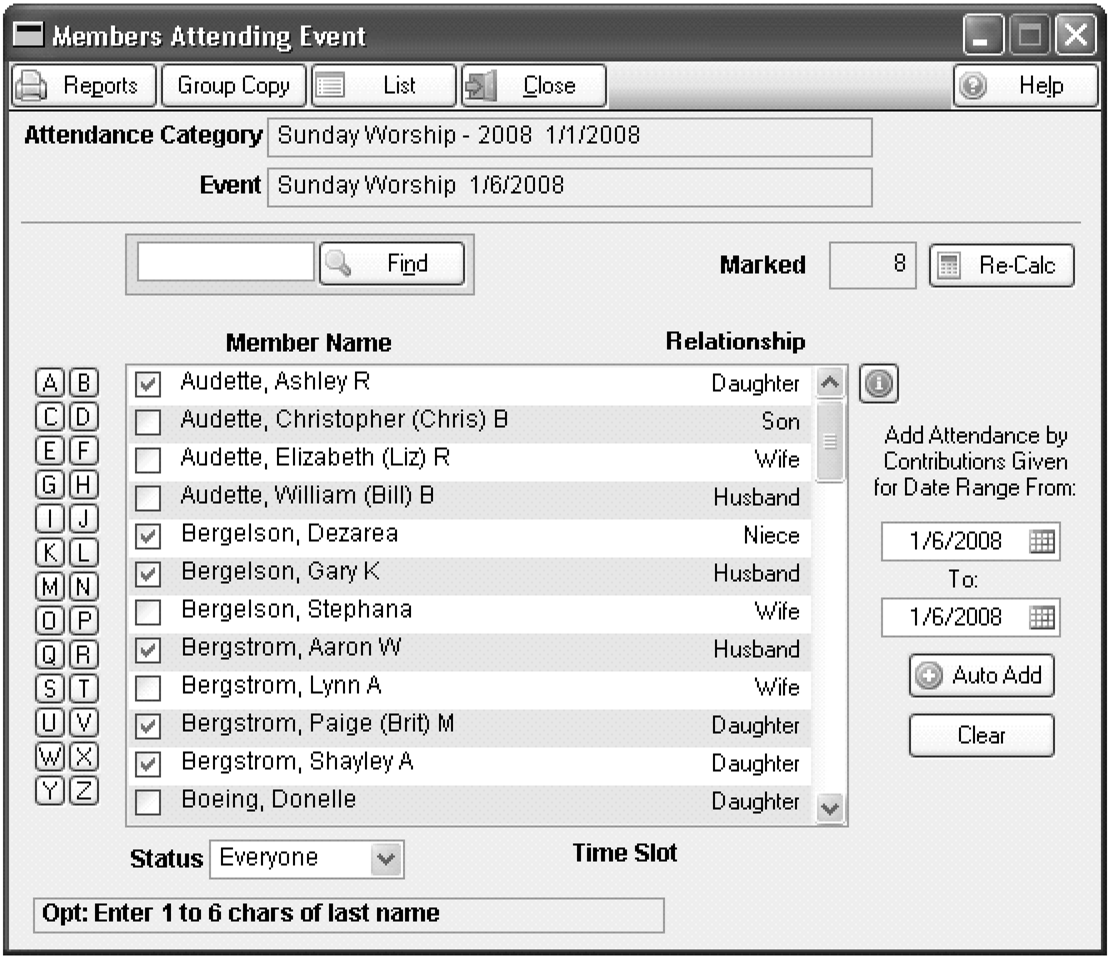
Contains the number of members or households marked as attended. Press the **Calc** button to recalculate this value.

Special Buttons – Attendance Events Maintenance

Calc

Recalculate the attendance for this event. This is for informational purposes only.

Attendance - Single Event



Clicking on the **Attendance - Single Event** button opens either the **Members Attending Event** window or the **Households Attending Event** window. The selection depends on whether the category selected was defined for member tracking or household tracking. Use this window to record the attendance of households or individual members.

The list in the scroll window can be restricted by the status box located below the scroll window. The **Find** box is available for locating a particular household or member. To populate attendance from another event press the **Group Transfer** button.

Add Attendance by Contributions Given

This feature exists to assign households (or members) as attending if a contribution was received. Obviously, it is necessary to enter and post contributions before using this feature.

To view a list of just the households or members marked, press the **List** button on the menu bar.

A checkbox can be set or unset when the checkbox has focus by using the mouse or the spacebar. Move up or down the window using the mouse, the up and down arrow on the keyboard or the **Find** box.

A drop down box at the bottom of the window called **Time Slots** is available when this attendance category was defined with the **Track Times** set to ‘Yes’. Setting it to a specific time frame will result in the time being kept with each attendance record. Reports are available providing analysis of attendance by time frame.

Special Buttons – Attendance Single Event

Group Copy

The **Group Copy** button is used to copy the attendance records from a prior event to the current event. To transfer the attendance information from a previous event, click the **Group Copy** button, select the event category and then the event for which attendance data will be copied from. Pressing the **Select** button copies the attendance to the current event.

List

Opens a window and displays a list of the records having the checkbox checked.

Auto Add

Assigns an attendance record for all households (or members) that contributed during the dates entered in the ‘From’ and ‘To’ date fields.

Clear All

Clears all the attendance records for the selected event.

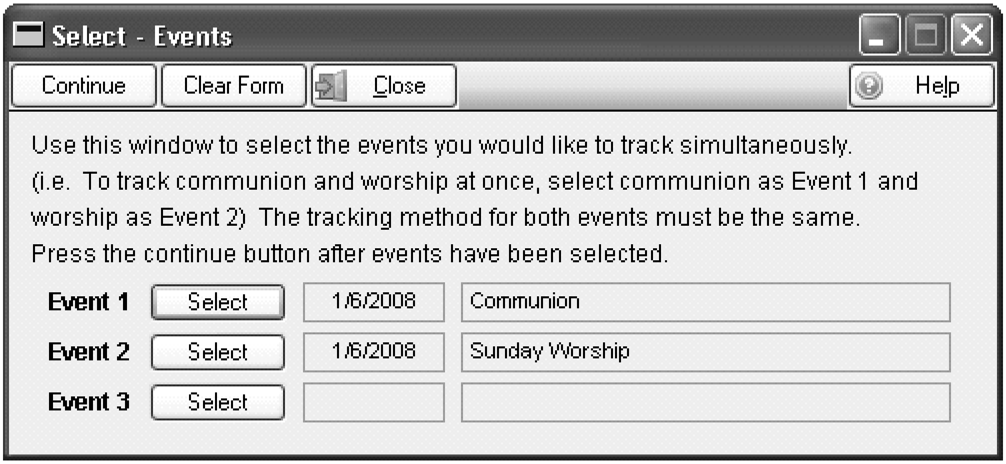
Recalc

Recalculates the count of attendees should there be a question of accuracy.

Min/Max View

The **Min / Max View** button (small blue button with an “i” in it) below the Re-Calc button is used to view detailed information for any selected household or member. First select a household or member in the scroll window and then click **the Min / Max View** button.

Attendance - Multiple Events



This window provides the capability to simultaneously track attendance for up to 3 selected events. For example: Attendance for Sunday Service and Communion can be done in one step saving you time.

Note: The 3 events selected must be setup to track the same way, either by Members or Households.

To begin the process, press the button **Attendance – Multiple Events** and select up to 3 events. Press the **Continue** button after the events are selected to record attendance.

Select Events

Event 1
Click the **Select** button to choose the category and event of the first event to mark attendance for. Since column 2 and 3 can automatically default to column 1, this column should contain those attendees that also attend column 2 and 3. For ex: Everyone who attends communion must also attend church, therefore column 1 would be communion and column 2 would be church.

Event 2
Click the **Select** button to choose the category and event of the second event to mark attendance for.

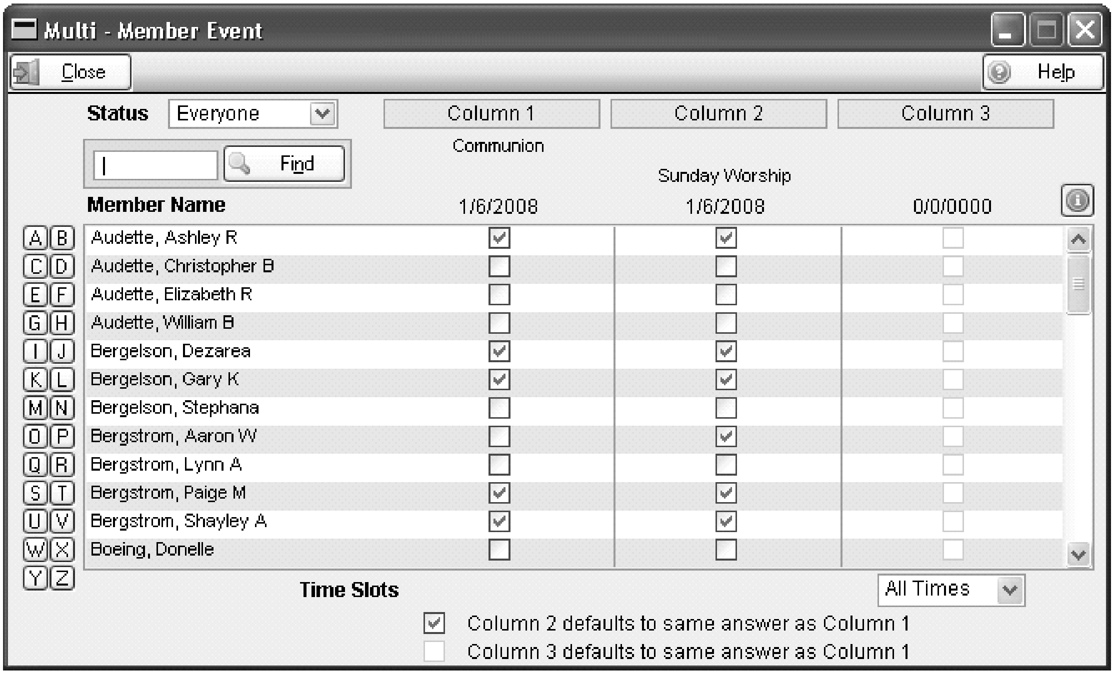
Event 3
Click the **Select** button to choose the category and event of the third event to mark attendance for.

Special Buttons – Attendance Multiple Events

Continue

This button will continue to the **Multi - Member Event** window where attendance is recorded.

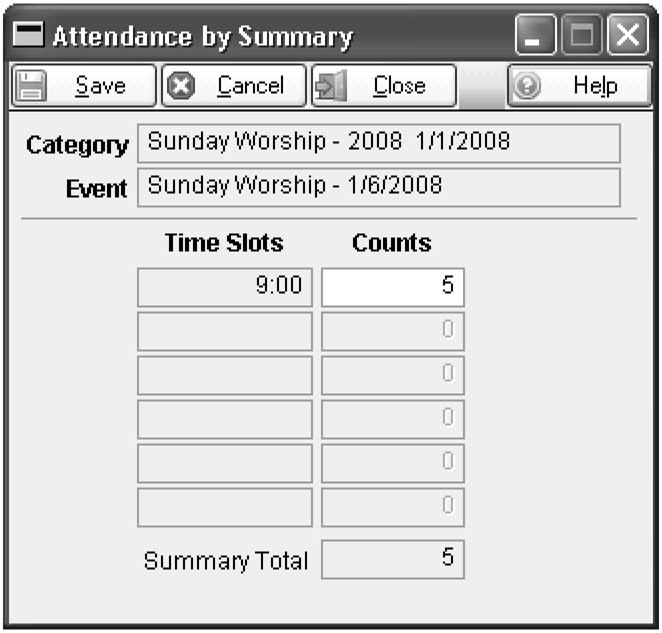
Multi - Member Event/Multi - Attend Events.



A drop down box at the bottom of the window called **Time Slots** is available when the attendance category was defined with the **Track Times** set to 'Yes'. Setting it to a specific time frame will result in this information being kept with each marked attendance record. Reports are available providing analysis of attendance by time frame.

To mark attendance to all events, simply point and click on the Column 1 checkbox next to the member name. Doing this will mark all check boxes. To unmark a single selection, click the desired checkbox. At the bottom of the window there is a checkbox stating 'Column 2 defaults to same answer as Column 1'. Unchecking this will disable the auto checking of column 2 and 3.

Attendance by Summary



Attendance by summary can occur for any category even when defined as 'track by household' or 'track by member'.

Entering attendance by summary provides head count information beyond what is obtained when tracking by members or households. For example, this method provides a way to track how many visitors and friends attend Sunday worship thus providing a more accurate attendance count.

Attendance for deleted members

When members are deleted from the system (rather than marked for deletion) they no longer appear on the attendance screen but the counts on the summary window will not be modified.

Special Window Fields – Attendance by Summary

Time Slots

A list of scheduled times that were defined for the selected category.

Counts

Total number of members in attendance at the selected event. The count for an event is usually a head count and may be different then the count calculated using the **Members Attending Event** form

Summary Total

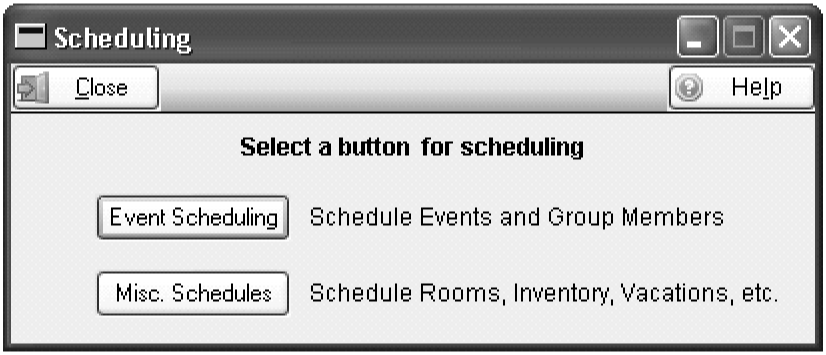
Total of all attendance counts for the event, over all time slots.

Special Buttons – Attendance by Summary

Cancel

Undo the changes made to the summary attendance data. Attendance information that was previously entered and saved will not be modified.

Scheduling

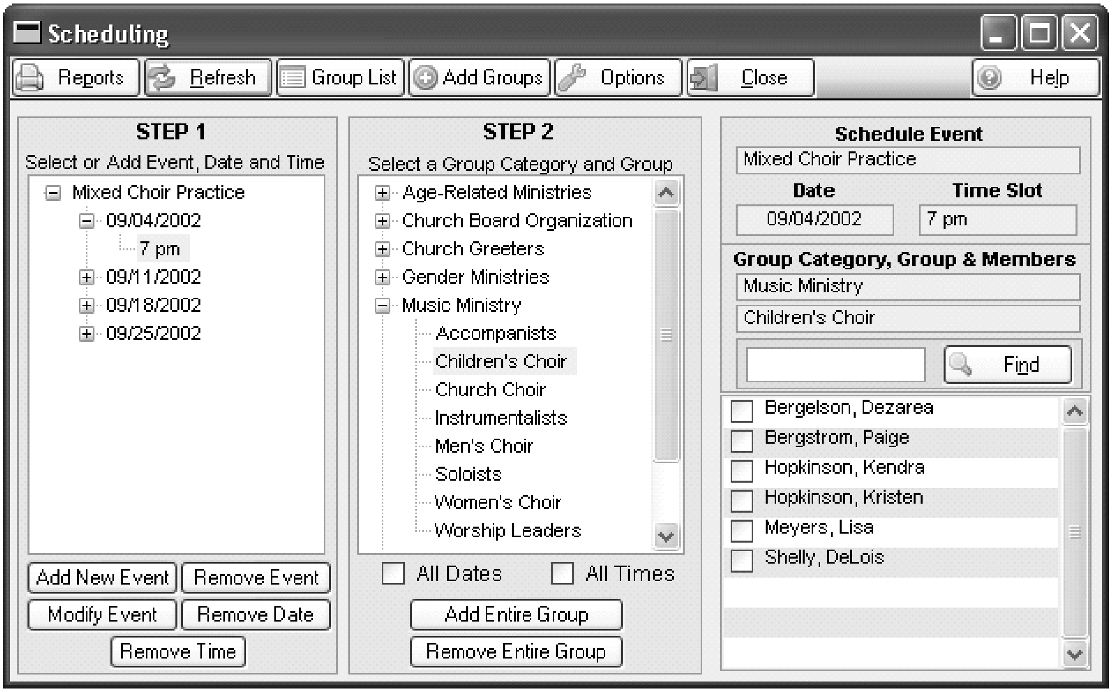


The **Scheduling** module provides the church with the ability to create events and schedule groups to those events. For example; Create an event called Sunday Service with service at 8:00 and 10: 00 am. Then schedule ushers, choirs etc. to those events. Scheduling reports are available that can be posted on bulletin boards or mailed to each member.

Press the button, **Event Scheduling**, to schedule groups to events. Once scheduled, members can be selectively removed or added. The main difference between group scheduling found here and group attendance found under the Groups module is that group scheduling lets you assign multiple groups to one or more events.

Press the button, **Misc. Scheduling**, to schedule rooms or inventory such as projector equipment. You have the freedom on this screen to design your own schedule categories and items.

Group Scheduling



Use this form to schedule groups and its members to an event. Events show up on the left scroll window. New events are added to the tree by pressing the **Add New Event** button. To modify an event, select the event from the tree and press the **Modify Event** button. Groups that show up in the right scroll window are created by going to **People – Groups Members**.

Adding New Events

When the window opens a list of defined events is displayed in the left scroll window. Events are added to the list using the **Add New Event** button and modified using the **Modify Event** button. A window titled 'Monthly Calendar' opens. Enter the event name and up to 6 time slots. Then press the **Save** button. Once saved, select the dates from the Calendar. Close the window to return to the Group Events window.

Modifying an Event

Select an event by clicking on it. Press the button **Modify Event**. Both the description of an event and the event times can be changed without having to reschedule the days.

Removing an Event
Remove an entire event by selecting the event in the left scroll window and pressing the **Remove Event** button.

Remove Date
Remove a date entry from an event by selecting the date to be removed and pressing the **Remove Date** button. This removes any group and group member assignments to this event.

Remove Time
Remove a time entry from an event date by selecting the time to be removed and pressing the **Remove Time** button.

Note: Schedules more than 60 days old do not appear.

You can control the date range of schedules to view using the **Options** button. To view past schedules use the **Reports** button and enter the date range you want information about or press the **Options** button to change the view. It is a good practice to periodically remove old schedules. To remove obsolete records, press the **Options** button, enter a date at the bottom of the screen and press the Delete button. All records prior to the date specified will be removed.

Adding a group to a scheduled event
Step1. Press the '+' sign to the left of the Event to show the Dates the event occurs. Click on the '+' sign to the left of the date to show the times scheduled for this date. Click on the time (not the '+' sign to the left of the time) to select a time slot.

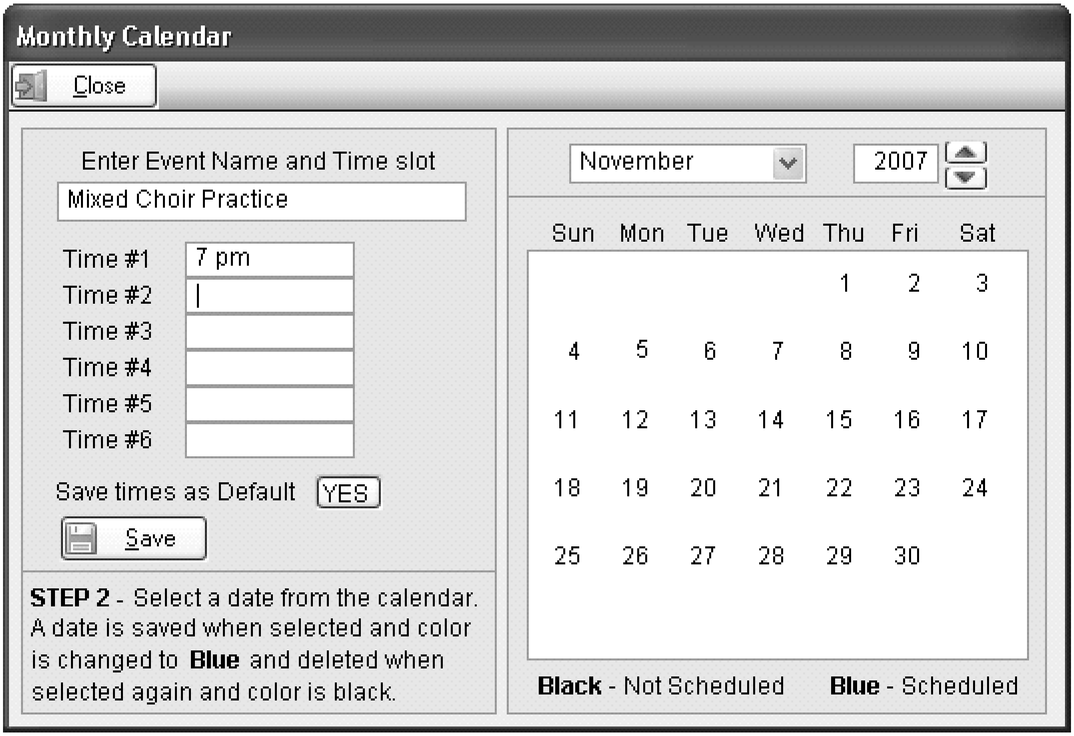
Step 2. Press the '+' sign to the left of the Group Category to show the related groups. Click on the group (not the '+' sign to the left of the group) to select a group. A list of members from the group selected will appear to the right.

Step3. Check the names of the people that will be attending the event. To mark all people press the button **Add Entire Group**.

Scheduling a group to a range of dates
Check the checkbox **All Dates**. Select the time and press the button **Add Entire Group**. This will add the selected group to all the dates for the selected event having the selected time. For ex: The Men's Choir could be scheduled for the entire winter quarter at the ten o'clock service with a single mouse click. Individuals can be removed from all dates just by un-checking their checkbox.

Scheduling a group to all times within a range of dates
Check both the **All Dates** and the **All Times** checkbox. Select either an event or an event date and press the button **Add Entire Group**. The selected group will be added to all dates and all times. Individuals can be removed from all dates and times just by un-checking their checkbox.

Monthly Calendar



This window is accessed by pressing either the **Add New Event** or **Modify Event** button. The Monthly Calendar is a modal window meaning there is no access to any other window in Revelations until this window is closed. Days displayed in blue indicates the group has been scheduled for this day. Clicking on a day will change it to blue indicating you want to schedule a group on this day. Clicking on it again will change it back to black. Days selected are automatically assigned with the time slots listed on the left. It is not necessary to press the **Save** button after selecting each date. Once all dates are selected press the **Close** button

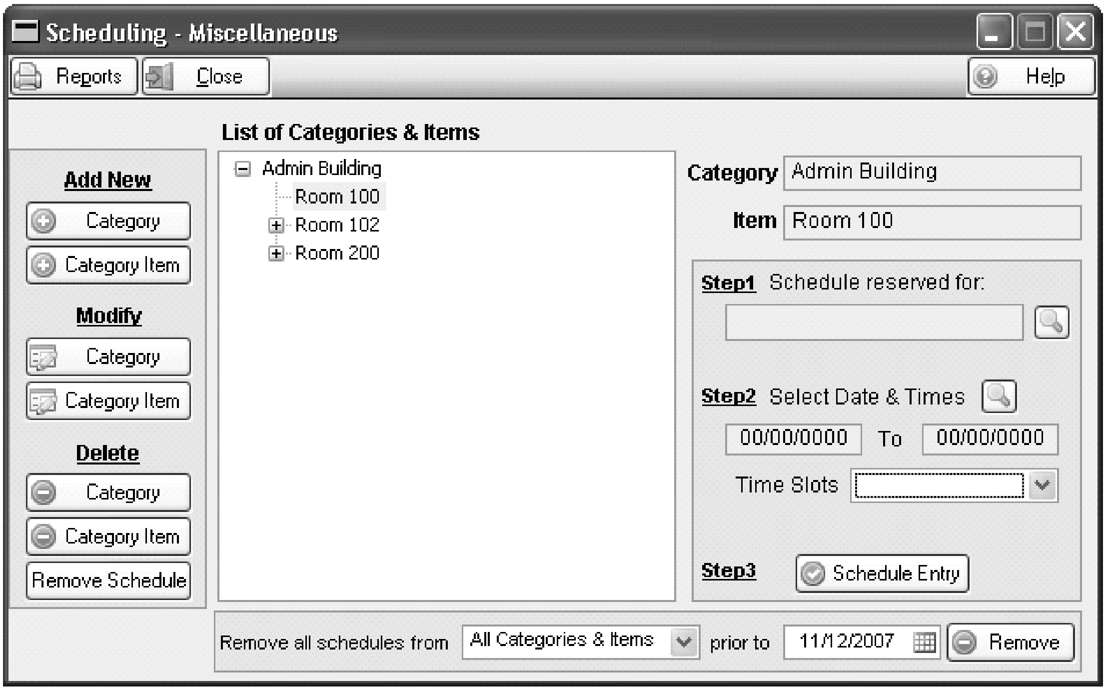
There is no key sequence to select a range of days. Each day must be selected individually.

Removing old schedules
As time passes, old schedules become obsolete and just take up space on the hard drive. To remove these obsolete records Press the **Options** button at the top and enter a date at the bottom of the options window where it says “Delete all expired schedules before”. Then press the **Delete** button. All records prior to this date will be removed.

Removing an Individual from a schedule(s)

Many times certain members of a group will be unable to attend some of the events. To keep an accurate accounting of who will be attending, you can remove and/or re-add members to scheduled events. The only thing required to do this is to select the date and time of the event and the group the person is associated. Then find the person's name in the list and remove the check mark.

Misc Scheduling



This window is used to schedule a wide variety of items you wish to keep track of. Use to schedule meeting rooms, inventory, vacations, etc.. When the **Miscellaneous Scheduling** window opens all existing categories will appear in the scroll window. Examples of a category would be a building. Room numbers would be considered category items and could be scheduled. The names of categories and category items can be modified without affecting their underlying schedules.

A schedule is assigned by time of day over the range of one or more consecutive days. A record is created for each day and the time associated must be consecutive. If there is a time gap for a schedule than two records will be created. The person responsible for the schedule is displayed whenever a schedule record is highlighted. Of course reports can be prepared for all or selected categories.

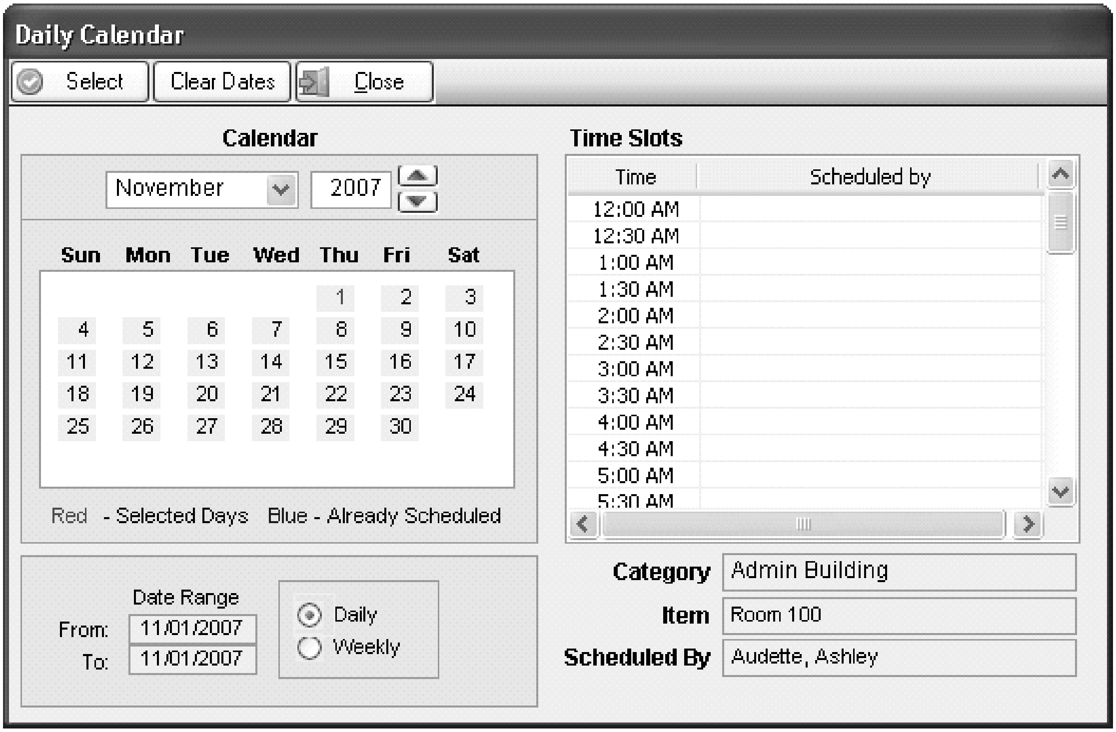
Categories and category items must exist before a schedule can be prepared. Do this using the buttons on the left side of the window. Next, follow the 3-step procedure shown on the right side of the screen.

Step1: Press the lookup button 

A lookup window appears. Select the church member who is requesting the schedule

Step2: Press the lookup button to the right of 'Select Date & Times'. A Daily Calendar appears. The Daily Calendar is a modal window. While a modal window is opened other windows within Revelations cannot be accessed.

Daily Calendar



Days this item is scheduled will show in blue. That does not mean, however, that all the time slots are used. Clicking a blue day will display the daily schedule and show the hours scheduled and for whom. Days selected will turn red.

Selecting a range of days

A range of days can be selected by clicking on the first day in the range and then clicking the last day in the range. All contiguous days will now appear in red. Days at the beginning and end of the range can be removed one at a time. Days inside the range cannot be removed.

To schedule on a weekly basis click on the **Weekly** button at the bottom of the window. Then click on the first day followed by clicking on the last day. A contiguous set of weeks will turn red as opposed to every day in the range.

A non-contiguous range of days cannot be selected. What can be selected is a single day, a range of days or a range of weeks (the same day each week).

Selecting the time(s) of day

Once the days have been selected, the time(s) during the day must be selected. Times are selected in half hour increments. To select a range of times, click on the first time in the range then while holding the shift key down click on the last time in the day. To select various times of the day, click on the first time then while holding the control key down click on other times of the day. Remember a schedule record is created for each non-contiguous set of time ranges.

Press the **Select** button to return to the scheduling window.

Step3: Press the button **Schedule Entry** – This takes the information selected from the daily calendar and builds the actual schedule. The scroll window is updated to reflect this action.

Special Buttons – Daily Schedule

Remove Schedule

Use this button to remove all scheduled dates belonging to a category item or to remove a particular scheduled date belonging to a category item.

To remove all dates belonging to an item, select the item and press the **Remove Schedule** button.

To remove a single date belonging to an item, select the date to be removed and press the **Remove Schedule** button.

Remove

Use this button to remove several scheduled items using a date parameter. Define the items to be removed by:

1) Using the drop down box to define the scope of the schedules to remove. This is a powerful feature so choose carefully.

All Categories & Items will remove all schedules prior to the date selected. Use this to clean up obsolete schedules.

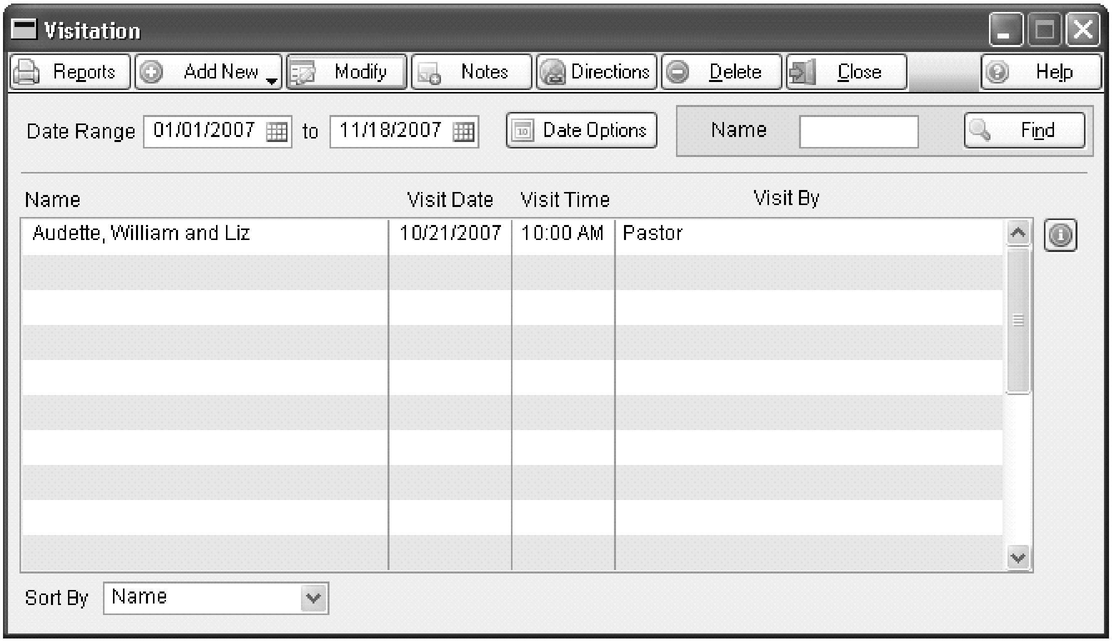
Selected Category to remove all schedules for the category selected

Selected Item to select a single category from which schedules can be removed.

2) Enter a date. Schedules on the date entered will not be removed only those prior to the date entered.

3) Press the **Remove** button

Visitation



The Visitation module allows the scheduling of visits to households or to members. Reports can be printed detailing a schedule of visits with directions to locations and a record of what transpired during the visit.

Note the sort box at the bottom of the window. The scroll window can be sorted by household visited, visited by, schedule date or visit date.

Schedules can be added or modified from the main visitation window, the household form, or from the member form.

Date Range

When the window opens the date range is pre-set to today's date. Only the items for the date range entered appear in the scroll window. Change this setting to expand the information viewed.

Reports

Press the **Reports** button to print several types of reports including the daily schedule for an individual

Special Buttons - Visitation

Add New

Add a new record to the scroll window. A small pop-up window appears allowing you to schedule a visit. Note the **Visit by** and **Visit Type** drop down boxes. If they are empty or if they do not contain what you are looking for, simply type in what you want and press the tab key. A prompt will appear asking if you want to add this entry to the list of drop down selections. Select ‘Yes’ to save the new entry. See **Visitation – Add / Modify Event** for more information on this window.

Modify

Modify a record in the scroll window. First highlight the record and then press the **Modify** button

Notes

Add notes to a record in the scroll window. First highlight the record and then press the **Notes** button

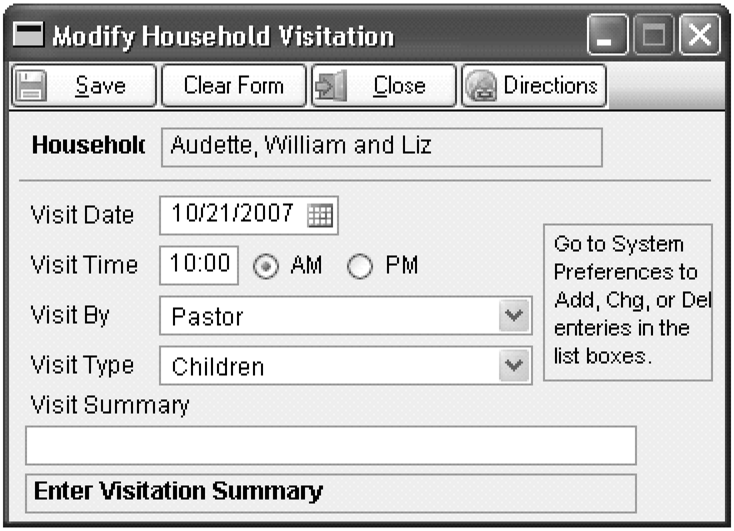
Directions

Add travel directions to a record in the scroll window

Date Options

Set the number of days to view. When this form is opened the beginning date is set to the current date and the prior setting of the date option determines the number of days displayed in the window.

Visitation – Add / Modify Event



Access this window by pressing the **Add New** or **Modify** button on the Visitation window. When entering the Visit Time both the hour and the minutes require the entry of 2 digits. For ex: to enter the time of 9:00 am the entry would be 09:00.

Special Window Fields – Visitation Add/Modify Event

Visit Time

When entering the Visit Time both the hour and the minutes require the entry of 2 digits. For ex: to enter the time of 9:00 am the entry would be 09:00.

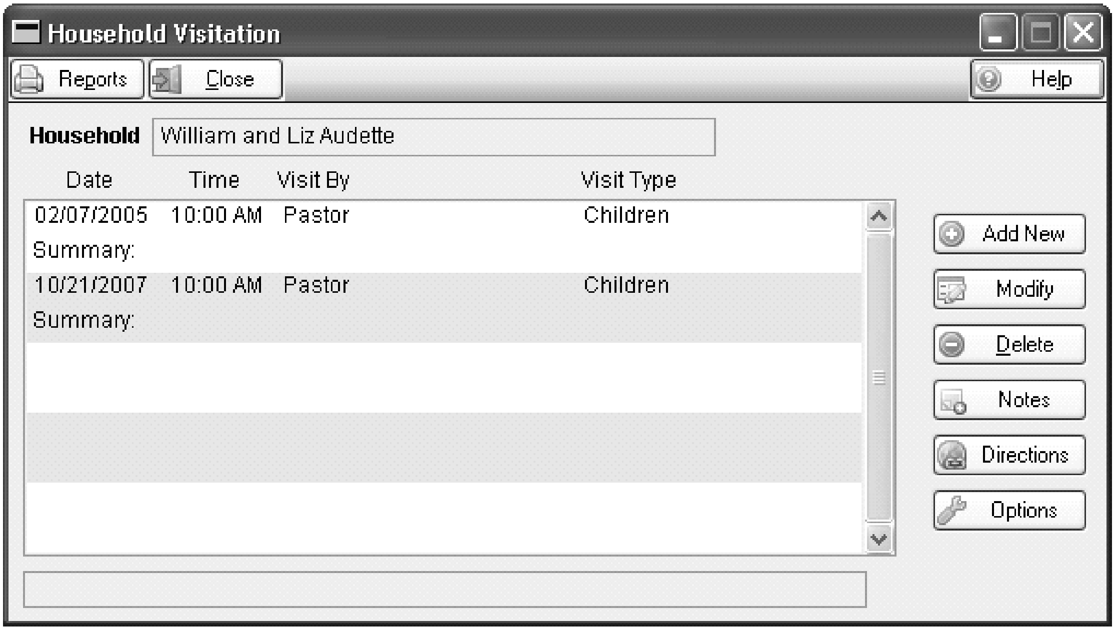
Visit By

Select an entry from the drop down box. If the desired entry does not exist, type in an entry and press the Tab key when complete. A question will appear asking if this new entry is what you want. Another way to add entries to the drop down is by going to 'System – System Preferences' and pressing the **Drop Down Lists** button.

Visit Type

Select an entry from the drop down box. If the desired entry does not exist, type in what an entry and press the Tab key when complete. A question will appear asking if this new entry is what you want. Another way to add entries to the drop down is by going to 'System – System Preferences' and pressing the **Drop Down Lists** button.

Visitation for Household or Member



This window is the same for both the household and the member. It shows the history of the visits and you can update the visit information or to schedule new visits.

Note the **Options** button on the right side of the window. Pressing this button opens a window where the drop down boxes containing the 'Visit by' and 'Visit Type' selections can be removed as choices. Prior uses of the selection to be removed are not affected.

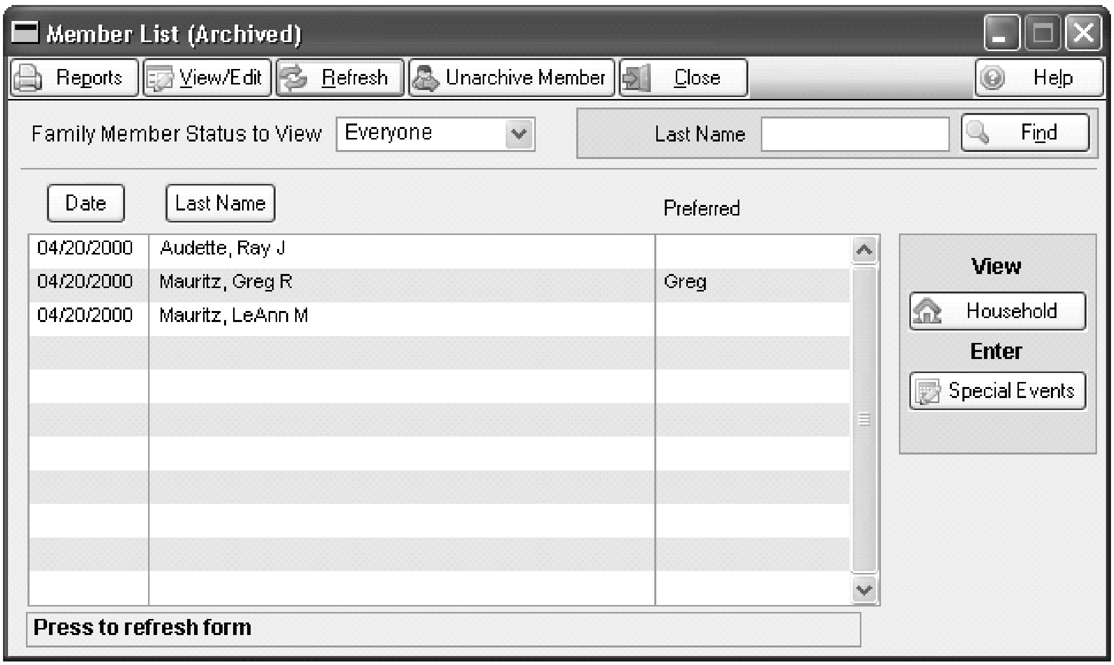
For detail information on how the buttons function go to the Visitation form.

Archives

Archiving is a process of retaining information about people, attendance and funds after the records are removed from the active database. This is valuable to churches that want to retain basic information about these items for possible future reference.

When a delete operation is executed for a household, family member, general attendance category or a fund a window will pop up asking if this information should be archived.

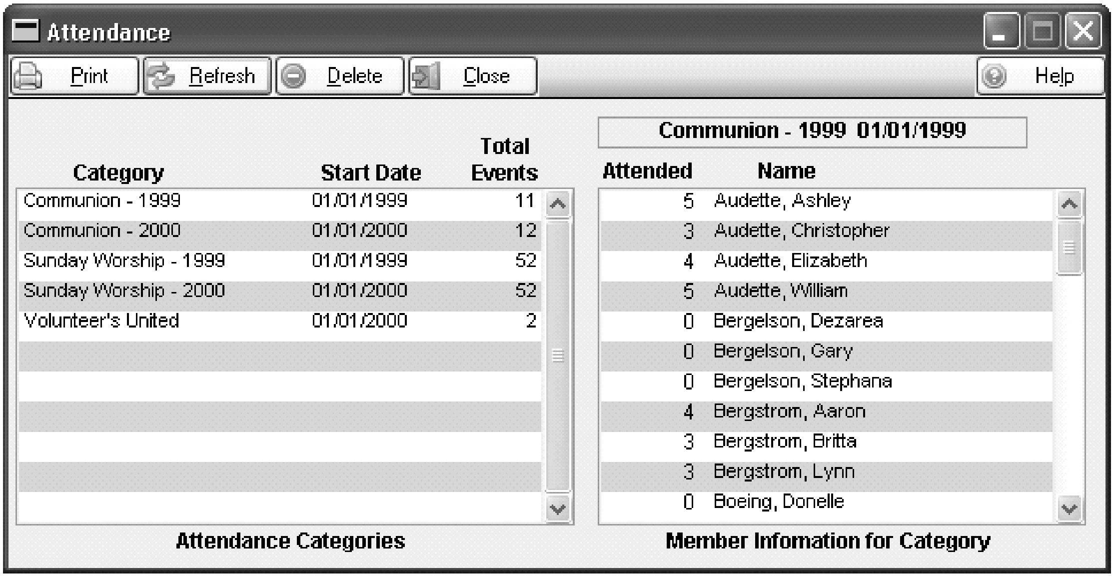
Members



Displays all people that have been removed from the database and were marked for archiving. When a household or member is deleted from the database a pop-up window appears asking if the deleted records should be archived. If the response is yes, the records are added to the archive file.

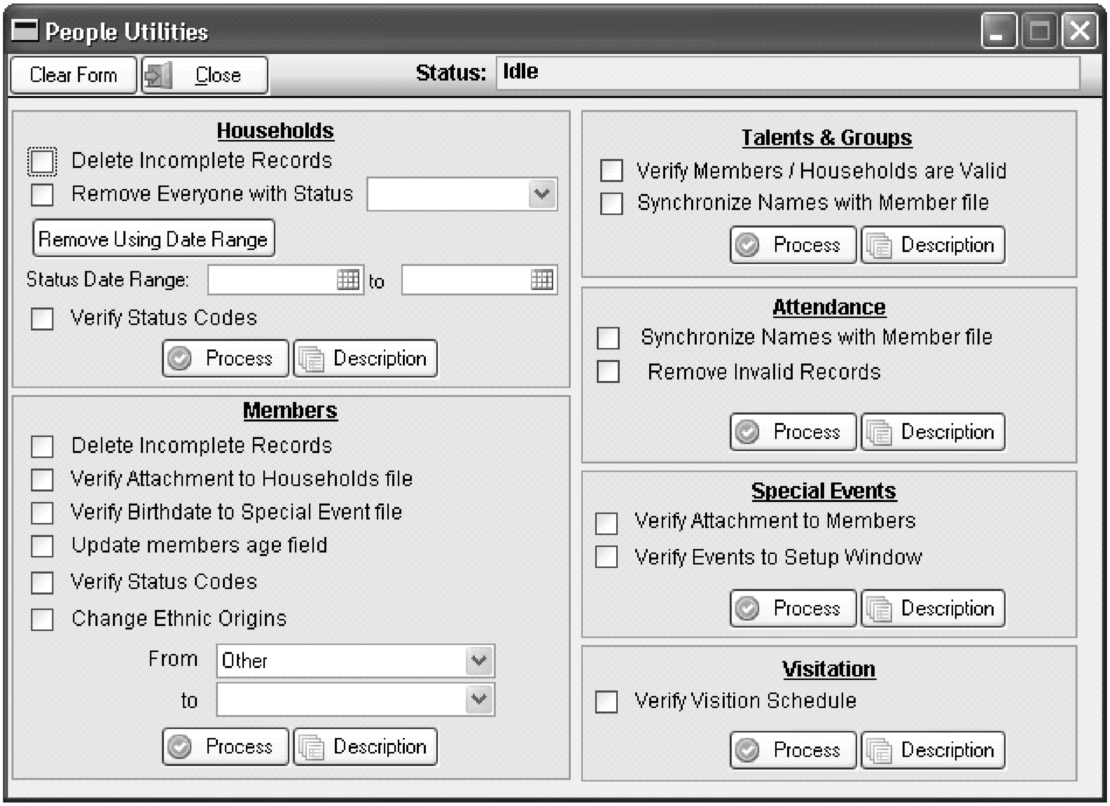
Press the **Unarchive Member** button to un-archive a member back to a household removing them from the archive file. Press the **Household** button to see the household this member came from. The household must still be part of the database for this to work. The **Special Events** button shows the special event information regarding the selected member.

Attendance



Displays all general attendance categories that have been removed from the database and marked for archiving. The left scroll window identifies the categories archived and when a category is selected the right scroll window shows the attendees and the number of times attended.

People Utilities



People Utilities is designed to verify system integrity and correct errors it may find. A common example would be status codes. Perhaps in the past some status codes were entered that are now obsolete. With past versions of Revelations there wasn't any way to easily remove those codes from the database. With **People Utilities** you can.

Another example is past versions of Revelations did not update names throughout the system when a name changed on the household or member form. This would cause confusion when the group member's window was being viewed. Use **People Utilities** to update these names to the most current information on the household and member forms.

Before using any of these routines we always recommend performing a backup to diskette or to the hard drive using the Revelations backup found under the **System** menu button.

Press the **Description** button to the right of the **Process** button for a description of what the routine does.

Special Window Fields – People Utilities

Delete Incomplete Records (Available for Households and Members)

The file will be scanned for records that are blank or do not contain enough information to be of value. These records will be deleted.

Verify Status Codes

The status codes for households (or members) is checked and if invalid will be set to 'Active' if empty or will be set to the last status code if not empty and not valid.

Verify Attachment to Households

Every member record will be checked for a proper link to a household. If it isn't linked, a warning message will appear suggesting this member be transferred to a Household. If either the members first or last name is missing it will be removed from the database. If its status is invalid it will be changed to 'Active'. Finally, if its relationship is invalid it will be set to 'Other'.

Verify Birth date to Special Event

Verify that both a birth date field in Special Events and Family Member file exist. This does not mean they have to be the same.

Update member's age field

The age field in a members record is based on the computer date and their birth date. Running this option updates the age value based on the birth date and the current date.

Talents & Groups – verify Members/Households

Verify that every member assigned to a talent or group is also linked to a valid household. Members without a valid link are removed from the talent or group.

Talents & Groups – Synchronize Names

Verify that the name attached to the talent or group is the same as that on the member file.

Special Events

Any special event records that are not linked to an existing member record are removed.

Special Buttons – People Utilities

Process

Begin the process of performing the action described by the checkboxes checked.

Description

Provides a description of what this process does.

Finance

Working with Finances

Envelope Maintenance

Funds & Pledges

Enter Contributions

Contribution Maintenance

Remote Contribution Entry

Reversing Entries

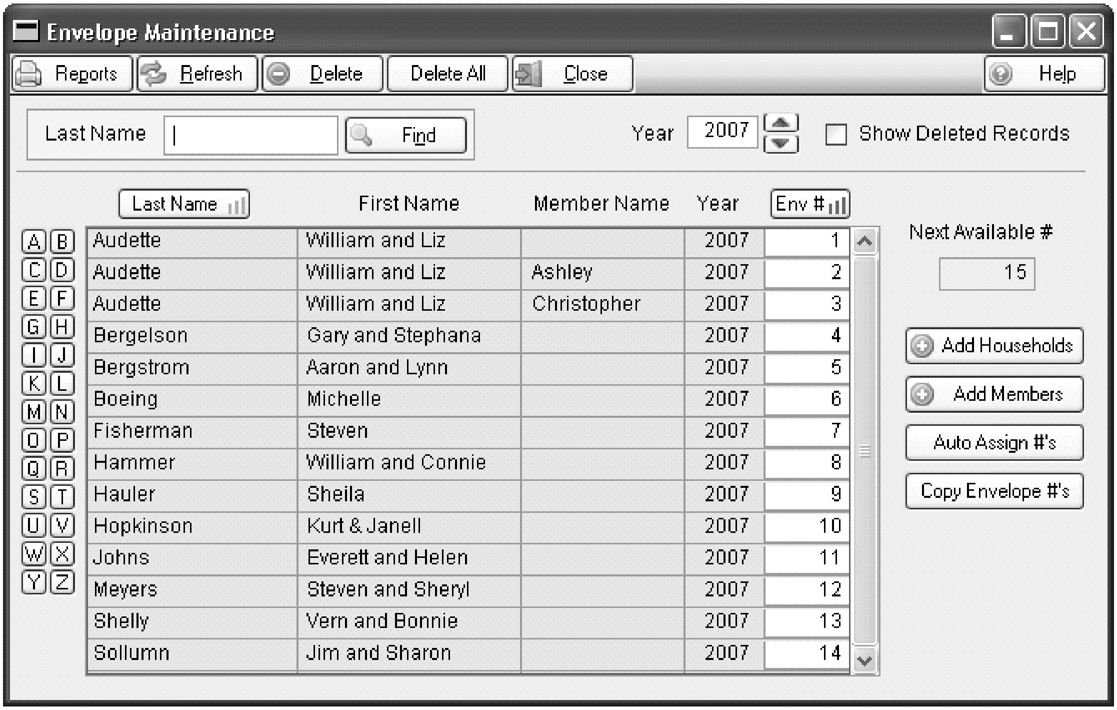
Reconcile

Archives - Financial

Finance Utilities

Finances

Envelope Maintenance



The **Envelope Maintenance** screen provides a method for managing multiple years of envelope number assignments. By having a complete assignment list for each year it is easy to switch between years and perform financial processing. Each year a household can have different envelope number assignments. A household can have multiple assignments during the same year but only the last assignment will be used on reports.

This window and the add envelope feature on the **Enter Contributions** window are the only two places where envelope numbers of zero can be defined for a household or for a member.

Envelope numbers are not required. If they are not used, households and members who contribute must then be assigned an envelope number of zero. An envelope number assignment must be unique. That is; two households or two members or a household and a member cannot have the same identical number unless that number is zero.

A great report to have on hand is ‘The Two Column List’. The left hand column of the report shows envelope number assignments in name sequence while the right column shows envelope assignments in envelope sequence. To print this report, press the **Reports** button on this window and set the ‘Report Type’ to Two Column List’. Another report available from this window is the **Unused number** report. By entering in a range of numbers a report is printed of any number not assigned within the range.

Add Household Envelope Numbers

Add new envelope numbers to households from within the **Envelope Maintenance** form. Click on the **Add Households** button to bring up a list of households, choose the status to view, locate the household you would like to add an envelope number to and type the envelope number in the blue area. The entry is saved automatically when the focus leaves the record. A value of zero assigns that value to the household. Multiple households can have the value of zero but a non-zero value must be unique to a household or to a household member.

Add Member Envelope Numbers

Add new envelope numbers to members from within the **Envelope Maintenance** form. Click on the **Add Members** button to bring up a list of members, choose the status to view, locate the member you would like to add an envelope number to and type the envelope number in the blue area. When the focus leaves the member record, the entry is saved. A value of zero assigns that value to the member. Multiple members can have the value of zero but a non-zero value must be unique.

Special Window Fields – Envelope Maintenance

Year

Indicates the year you are working with. The default year is defined in the **System Preferences** form.

Env#

Envelope numbers are assigned to households and/or to members. Either enter in a new envelope number, modify a number or delete a number using the **Delete** button. Sort the scroll window by envelope number by clicking on the button labeled Env #. Any number entered must be unique within this years list of numbers

Next Available

Next available number to be assigned. If you are using more than one sequence of numbers, this will always be the next available in the highest set of numbers. Push the button **Auto Assign** to re-assign envelope numbers. A window appears giving you the opportunity to establish the starting number. Normally this feature is used at the beginning of the year.

Special Buttons – Envelope Maintenance

Delete

Use to delete a member or household envelope number. Click on the envelope number to delete and choose the **Delete** button. A prompt appears asking to confirm the delete process. Only envelope records that have not recorded any contributions or pledges can be deleted.

Delete All

Delete all envelope numbers assigned that have not had any contributions posted. Envelope numbers that have received contribution will have their number set to 0 (zero)

Add Households

Opens the **Add Household** window. With this window one can quickly assign envelope numbers to several households. Set the status drop down to the desired value. Click on the **Envelope #** field for the desired household and enter in the envelope number. Move between fields by pressing the down arrow. There is no save button to push as that happens automatically when the focus leaves the envelope number field.

Add Members

Opens the **Add Member** window. This functions the same as the **Add Households** window above.

Auto Assign #'s

Use this button when envelopes have not yet been assigned or you want to reassign envelope numbers. This is normally done at the beginning of a new year.

A window opens up where the starting envelope number is entered. A different range of numbers can be used for children's envelope numbers. Be sure the starting number for both groups are far enough apart that they cannot overlap one another. Duplicate envelope number errors will occur if this were to happen.

Copy Envelope #'s

Copies the envelope numbers from one year to another year. Doing this allows all households and members to retain the same envelope number.

Special Window Fields – Add Member Envelope Number

Use this window to quickly assign envelope numbers to members

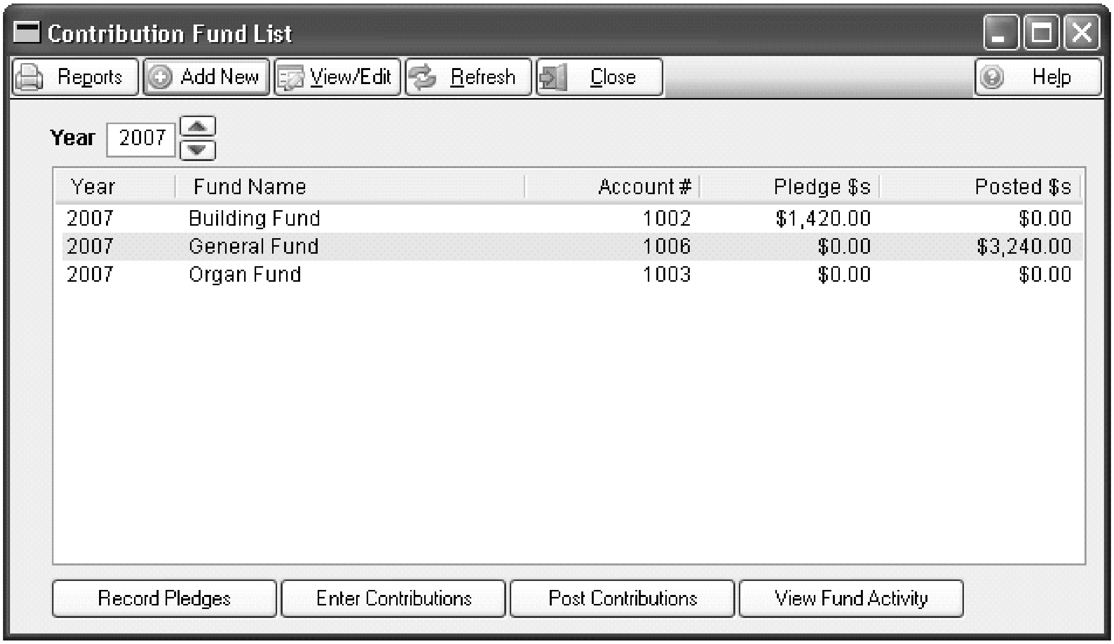
Restrictions

This button opens a window where members displayed can be restricted by either their date of birth or their confirmation date.

Delete All

Removes all the envelope number assignments. All envelope numbers assigned will be changed to zero.

Funds & Pledges



The **Fund List** window includes a full list of all funds created for the church. From this window, a fund may either be added or edited or simply select a fund to use with the other financial functions listed at the bottom of the window.

The funds that appear when the window opens are determined by the year setting on the menu bar. This default setting can be changed in the **System Preferences** window.

View/Edit

This button allows you to modify a fund definition or to delete a fund (if no pledges or contributions). First, select the fund in the scroll window and then press the button.

Add Funds to the Database

Press the **Add New** button to add new funds to the database

Recording Pledges

Select a fund in the scroll window and press the Record Pledges button to record pledges for one or more households. Some special pledge reports are available from this window.

Enter Contributions

Press this button to enter contributions for households and members. Funds must exist and envelope numbers assigned to households and members before this feature can be used.

Post Contributions

Press this button to open the **Post Contributions** window. Posting is the action that assigns batch transactions to households and members. Contributions will not appear on statements or any financial report until they are posted.

View Activity

View all the posted transactions for a fund. Use this form to locate the journal number associated with a particular transaction that was posted.

Special Window Fields – Funds and Contributions

Year

Year the fund was intended for.

Account

The assigned account number for this fund. This field is used for the 'Speed Entry' of contributions, and should be unique for each fund.

Pledge $s

Total dollars pledged to this fund

Posted $s

Total contributions posted to this fund

Special Buttons – Funds and Contributions

Record Pledges

When the **Record Pledges** button is selected, the **Assign Pledges to a Fund** window is displayed. Pledges can be entered from this one window for all households and members. A fund must first be selected before pressing the button.

Enter Contributions

Contributions to the church are recorded and processed using batches. A batch is a collection of contributions (Ex: a collection at the 9:00 am Sunday service). Within a batch there can be an unlimited number of individual transactions (contributions).

Contributions made to multiple funds can be entered within the same batch. Use the **Distribute** button on the entry screen to do this or to assign an entire contribution to a fund other than the default fund.

Revelations uses batches to record contributions to enhance your ability to audit and track donations to the church. Batches also make it easier to resolve data entry errors that might occur.

Post Contributions

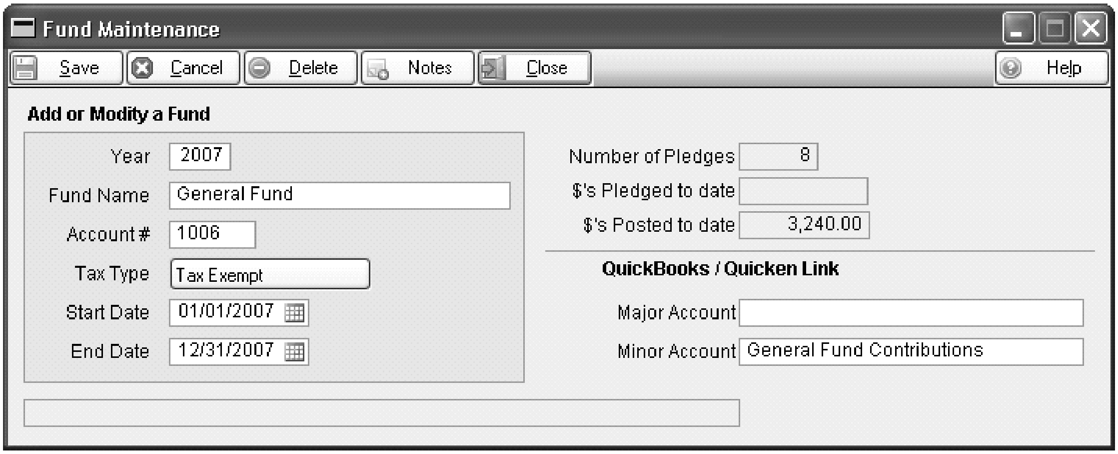
After recording all of the contributions associated with a given batch, the Post Contributions button is used to post (permanently record) these transactions.

When posting a batch, ***Revelations*** updates the contribution records for church members. In addition, ***Revelations*** can create summary files that can be used with either Quicken or QuickBooks. These financial files can be imported by using the QuickBooks Import facility. The funds are represented in Quicken or QuickBooks as type ‘Income’ accounts.

View Activity

The **View Activity** button opens the **View Contributions by Fund** window. From here posted contributions to households and members can be viewed for the selected fund.

Fund Maintenance



The Fund Maintenance window is used to add/update information for a particular fund. Funds must exist before contributions can be entered. Enter the correct year (must be 4 digits such as 2007), fund name and account #. Save the changes by clicking the **Save** button.

Linking with QuickBooks

If you plan to link with QuickBooks and you want the fund to be a sub-account in QuickBooks, set the Major Account field to the account the fund is to be a sub-account to. If a Minor Account is entered, the fund will be a sub-account to the minor account.

> Example: Setting the major account to Contributions and the minor account to Restricted will result in the fund called ‘General’ to be posted into QuickBooks as follows:
>
> Contributions
>
> Restricted
>
> 2007 General $xxx.00

If the fund year is 2007, the account ‘2007 Sunday Services' would appear under the Income Account ‘Restricted’. The maximum size of an account in QuickBooks is 30 characters. Five characters can be saved by not including the year as part of the name. This option to omit the year is set on the **Posting** screen.

Special Window Fields – Fund Maintenance

Year

Year for which the fund begins. This entry must be 4 digits.

Fund Name

Name of the fund. The maximum size that QuickBooks handles is 30 characters.

Account #

Account number assigned to this fund. The account number can be used for the ‘Speed Entry’ of contributions this number should be unique for each fund created. QuickBooks does not import account numbers.

Tax Exempt

Is this fund exempt from taxes? If so, set to “Yes (default). Otherwise, set to “No. When contribution statements are printed, taxable funds and tax exempt funds are not included on the same report.

Start Date

End Date

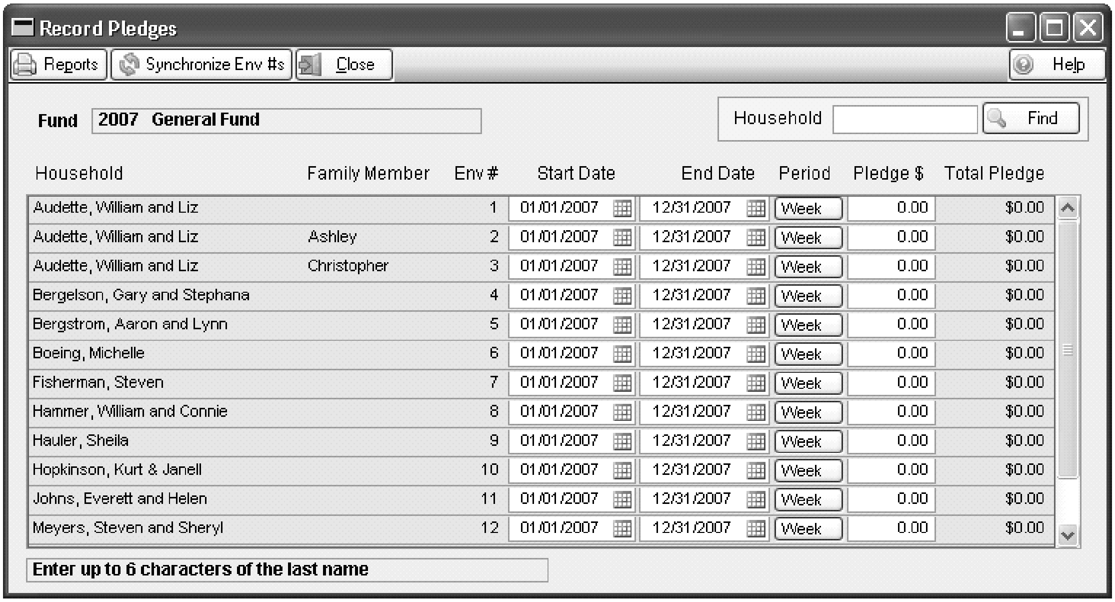
Date range for which the fund is active. Multi-year funds are allowed.

Special Buttons – Fund Maintenance

Delete

Delete the selected fund from the list of funds available. A fund can only be deleted if no contributions have been posted to it. See **System Utilities** to delete a fund containing posted contributions.

Record Pledges to a Fund



From the **Contribution Fund List** window, select a fund and press the **Record Pledges** button. The **Record Pledges** window appears. From here, one can modify or remove pledge information. Only households and members that are assigned an envelope number appear on this window.

Adding Pledges

A pledge is a financial commitment a family or a member makes to the church. A household or member must be assigned an envelope number (zero or non-zero) before a pledge can be assigned. Be sure the year setting on this window is the one you want. If it isn't, go to the **System Preferences** form and change it. Care must be taken with this form that pledges are not assigned to funds using the wrong year.

Entering Date Ranges

Pledges can be assigned date ranges for a partial year, full year or multiple years. The date range can be different than that defined by the fund although they would normally be the same.

Envelope numbers cannot be assigned to households or members using this form. To do that, proceed to **Funds - Envelope Maintenance.**

Special Window Fields – Record Pledges

Period

This is a visual switch whose value can be changed by clicking on it. The values are: week, month, quarter, year and other. Use the selection of 'Other' for one-time contributions.

Pledge $

The Pledge $ field represents the dollars that will be contributed based on the period specified.

Ex: Period: Week

Pledge $: $100

Total Pledge would be: $5,200 (based on a date range containing 52 Sundays)

Total Pledge

This is a calculated field. The total pledge is calculated by taking into consideration the 'Period', '$ Amount, 'Date Begin' and 'Date End' entries.

Start Date

Beginning date the pledge is effective – Push the up-down arrow by the help button to view the 'Start' and 'End' date.

End Date

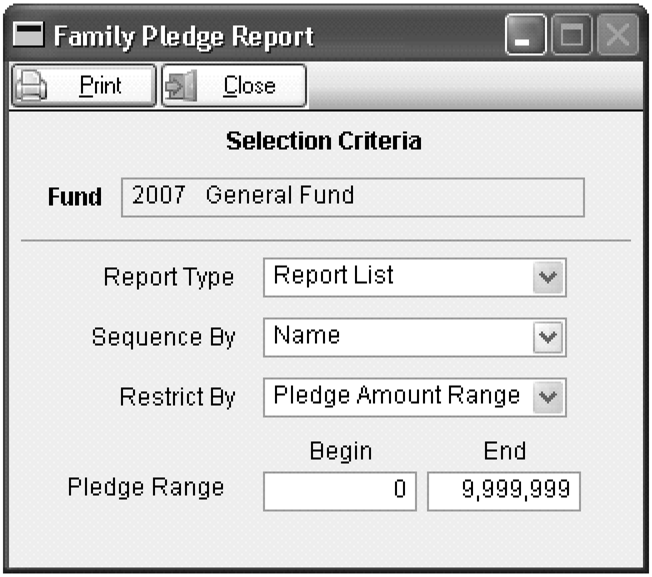
Ending date the pledge is effective. A minimum date range of one week is required.

Special Buttons – Record Pledges

Synchronize Env #'s

Sometimes envelope numbers for a family change. Pressing this button provides a system check verifying that all contributions received to this fund are using the latest envelope number defined.

Family Pledge Report



The **Family Pledge Report** window is used to prepare reports, mailing labels and a merge file for the selected fund allowing restriction by either the amount pledged or the amount contributed. The report may be printed in four different sequences: last name, envelope number, amount pledged or amount given. An amount range can be set to further restrict what the report prints.

Special Window Fields – Pledge Report

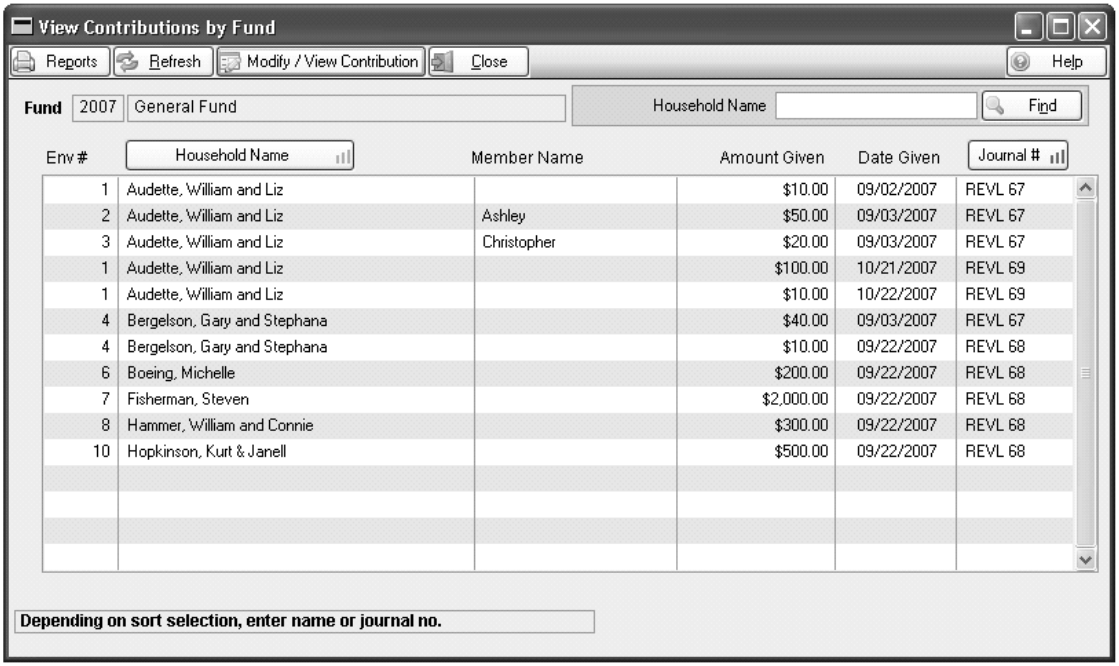
Restrict By

Restrict the report content by entering a dollar restriction by either pledge amount or contribution amount.

Pledge Range or Contribution Range

The Pledge Range is the dollar amount that is used to restrict the list of names generated for this report. Leave the beginning and ending dollar values as they are set to ($0 and $9,999,999) report all amounts.

View Contributions by Fund



Access this window by selecting **Finance – Funds / Contributions**. Select a fund from the scroll window and press the **View Fund Activity** button. The window provides a list of all contributions posted to the selected fund.

By clicking on the column headers, the scroll window will be sorted by the column selected. Additional information about a transaction is available by either double clicking on a contribution or by highlighting a contribution and pressing the **Modify/View Contribution** button.

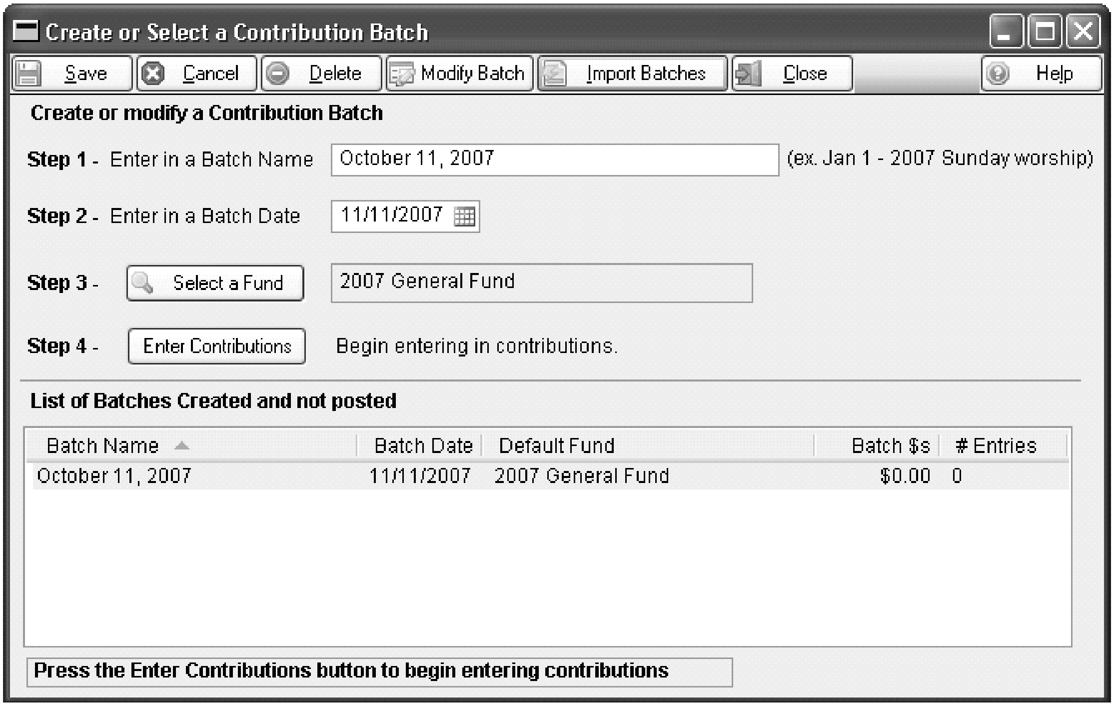
Correcting a Contribution Date

Occasionally a contribution will get posted with the wrong date. This problem can be corrected without doing a reversing entry using this window. Select the transaction in error and press the button

Modify/View Contribution. A window opens where the date can be changed. Press the **Save** button after making any changes. To change the dates for all the transactions in a batch go to **Finance – Contribution Maintenance**.

Enter Contributions

Contributions Batch



Access this window from **Finance – Funds & Pledges** and then press the button **Enter Contributions** located at the bottom of the window. From the **Contributions Batch** window, either create a new batch or edit an existing batch. In ***Revelations,*** all contributions are grouped together and processed as a batch. A new batch is typically created for each event where contributions are taken (church services, fund-raising efforts, etc.). Finished batches should be posted as soon as possible so the information will be available to other financial reports.

Each batch has a default fund associated with it. By selecting a fund for which most transactions apply, the key entry process is speeded up. Each batch can have a different default fund associated with it. Contributions entered into a batch are not reflected in any of the financial reports. If a batch is deleted, so are any contributions within it.

Posting a batch is the process of permanently recording the transactions to the households and members. Once posted, they are reflected in the financial reports.

Contributions may also be entered electronically. For information on Electronic Contributions see Electronic Contributions.

A batch may be closed and re-entered any number of times. It will remain until it is either deleted or posted.

Naming Batches

A batch is identified by both its name and date. Therefore, batches can have the same name as long as the dates are different. A batch name and its default fund can be changed until transactions are entered. Once transactions are entered the only way to change the default fund is from the **Modify Batch** window. Select a batch from the scroll window and press the **Modify Batch** button.

The current date (default) should always be used. This is especially useful when looking back at posted transactions for one period that were prepared in another period. The only exception to this is when linking to QuickBooks. Since a batch of contributions can contain many dates, Revelations uses the batch date when submitting the accounting period to QuickBooks. For ex: If the batch date is 3/15/07 and it is imported into QuickBooks, it will have a journal date of 3/15/07.

Finding Errors in a Batch

While a batch can be any size, keeping the number of transactions in a batch to less than 100 will speed up the process of finding key entry errors when they occur. Finished batches should be posted as soon as possible so the information will be available to other reports.

Sometimes an incorrect date will be assigned to all the transactions in a batch. This can be corrected by selecting the erroneous batch from the scroll window and pressing the **Modify Batch** button.

Special Window Fields – Contributions Batch

Batch Name

Step 1: Assign a name to the batch. Duplicate batch names are allowed as long as the batch date is different

Date

Step 2: This is the date the batch was created. This date should not be changed as it is a reminder of when it was prepared. The exception to this is when linking with QuickBooks or Quicken. The date entered here is used by those products as the posting journal date.

Default Fund

Step 3: Press the button **Select a Fund**. Select a fund for which the majority of transactions will be applied to. This speeds up the key entry process.

Enter Contributions

Step 4: Press the button **Enter Contributions**. This opens the contribution entry window where contributions can be opened

List of Batches Created and not posted

A list of batches that have been created but not yet posted. Once a batch is posted, the contribution amounts within that batch are permanently recorded and the batch is automatically deleted. To remove posted contribution(s) from the system, create a Reversing Entry .

Special Buttons – Contributions Batch

Save

Saves the current batch in the window **List of Batches Created and not posted**. You can return to this window at any time and select the batch for contribution entry.

Cancel

Press the **Cancel** button to clear the data entry fields.

Delete

To delete an existing batch, select it from the scroll window and press the **Delete** button.

Modify Batch

Correct certain batch errors with this option. The batch date, default fund and transaction date for all contributions can be changed using this option.

Import Batches

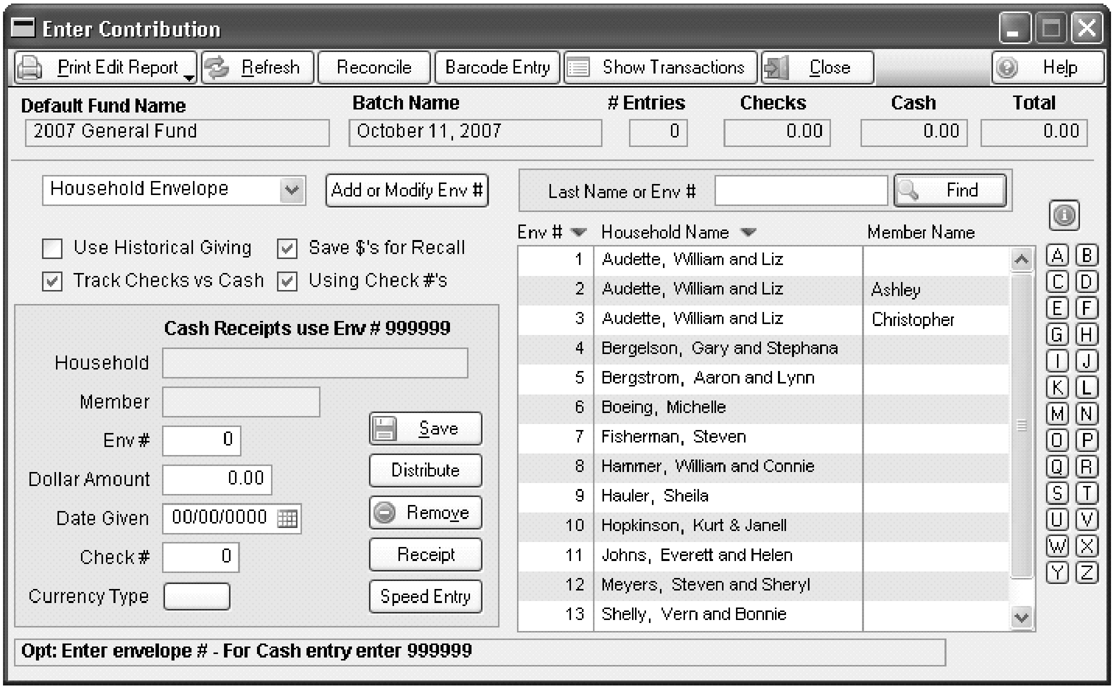
Use this button to import an email file sent by Vanco Services, Inc. Vanco Services is a company that can manage the process of electronic fund transfer of dollars from a household or member to selected funds. For more information call Vanco Services, Inc at (800) 774-9355. For information on preparing information for Vanco Services, lookup Vanco Services in the index section.

This button can also be used to import batches from a text file or remote contribution entry. See Remote Contribution Entry for information inputting batches from a remote location.

Select A Fund

Before transactions can be entered to a batch, select a default fund to which most transactions apply. Press the **Select A Fund** button and select the default fund.

Enter Contributions



Enter Contributions is used to enter contributions into a batch. A household or family member must have an envelope number assigned to them before a contribution can be entered for them. Envelope numbers of zero qualify. A barcode reader can be used to read the envelope number on the envelope provided it is properly bar coded.

Entering contributions in a batch does NOT affect a household or members financial record. This is the time to add, change, and delete entries until the batch is complete and correct. Not until a batch is posted are the entries made a permanent part of a household or members records.

The Scroll Window

The scroll window contains 3 fields; Last – First name of household, member name and Envelope #. A member name appears only when a family member is assigned to the envelope #. Click on the column headers on the scroll window to change the sort sequence.

Envelope numbers

Envelope numbers can be assigned to households by clicking the **Add or Modify** button next to the field Household Envelope. A window is opened which presents all the households. From this window you can assign envelope numbers (including the number zero) to households or change an envelope number. Non-zero values must be unique.

Envelope numbers can be assigned to members by clicking on the field **Household Envelope**. Doing so will open a drop down box from which you can select **Member Envelope**. Then click the **Add or Modify** button. Members can also be assigned an envelope number of zero.

Distribution of contributions

A contribution can be distributed to one or more funds. Press the **Save** button to save the entire contribution to the default fund. Press the **Distribute** button to distribute all or a portion of the contribution to other funds. There is no limit as to the number of funds a contribution can be distributed to.

Speed Entry of contributions

Contributions can be entered through a spreadsheet style interface allowing rapid entry of contributions to multiple funds. Requirements for the speed entry window are a household or member must be assigned an envelope number other than zero and all funds for the year must have unique account numbers. There is no limit as to the number of funds a contribution can be distributed to.

Press the Speed Entry button located at the bottom of the contribution entry section. A new window will open with the cursor positioned in the Env # field of the scroll window. Enter an envelope number and press the TAB key. The fund can be selected using the Account # drop down or by using the Fund drop down. Use the TAB key to continue moving to the next field. Tabbing to the next line, saves the transaction.

Bank Deposit Slip

Revelations can prepare a bank deposit slip at posting time. Banks require deposit slips to identify all checks and cash. When entering contributions a switch is available which toggles between Check and Cash.

Use of Enter key as a Tab key

Rather than pressing the tab to move between fields some find it a lot faster if the **Enter** key could be used as a **Tab** key. The option to define the **Enter** key to operate as a **Tab** key is an option on the **System Preferences** form. Pressing **Enter** then causes control to pass to the next field even when the focus is on a button. To invoke the button action, perform either a **mouse click**, a **Shift Enter** or an **Alt S**.

Special Window Fields – Enter Contributions

Default Fund Name

This is the fund that a transaction will be assigned to when the **Save** button is pressed.

Envelope Assignment Window

This is a scrolling list of households/members that have been given an envelope number of zero or non-zero. To find a household or member:

- Click on the **Env #** button to sort the list by envelope number. This is the default sequence.
- Click on the **Household** button to sort by household last name.
- Enter the envelope # or the first few letters of the household last name and click **Find Env#** or **Find Household** to search the list.

To make a selection from this scroll window, click on the associated row.

Note: After a contribution is entered, control will always return to the **Find** box when the scroll window is sorted in Household sequence. Use this mode only when the envelope numbers are zero.

of Entries

Total number of contributions entered for this batch.

Total

Total dollars accumulated in this batch. If this number does not appear correct, press the **Reconcile** button. Revelations will re-check the total and correct it if it is wrong.

Use Historical Giving

The amount of the contribution last received for this household will be suggested in the **Dollar Amount** field below. The amount displayed is the last amount given when transactions were entered and the option **Save $'s for Recall** was checked. Uncheck this field to disable a dollar suggestion being made.

Save $'s for Recall

Any dollar amount entered will be saved as a suggested amount of giving in future entries for this household. This should be unchecked when entering contributions for infrequently used funds.

Using Check #'s

The check number field below will be ignored for faster key entry when this field is not set. However, to show check numbers on contribution statements, this field must be changed to **Using Check #'s**.

Track Checks vs. Cash

Check the checkbox to print a Deposit slip. Banks require that the checks be recorded. Leave this field unchecked if deposit slips are not going to be printed with ***Revelations***,

Env #

Number of the envelope used to make a contribution. To select a member or household, either select that member or household from the scroll window or enter the envelope # and the system will automatically display the member/household that made the contribution. If the household / member to select has an envelope number of zero, the household/member must be selected by clicking on the record in the scroll window.

Dollar Amount

Total dollars contributed. Pressing the period (.) eliminates the need to enter 00 for cents.

Date Given

The date given should be set to indicate the intended date of giving. This date is used for all financial reports run with date restrictions.

Currency Type

Method by which a contribution was received. This field is important when requesting a bank deposit slip to be printed at posting time. Check the checkbox **Track Checks vs Cash** to turn this feature on.

Check #

Number of the Check used to make the contribution. This is an optional field and will be bypassed when the option **Using Check #'s** above is unchecked. **Track Checks vs Cash** must be checked before this feature can be turned on.

Special Buttons – Enter Contributions

Print

Print the **Contributions Batch Edit** report. Use this report to review and verify the accuracy of the batch prior to posting(permanently recording the contributions). The report is sorted according to the drop down selection made.

Refresh

The Refresh button clears all of the current data fields on this window.

Reconcile

Reconcile reviews all the contributions in the current batch to ensure that the batch has been properly totaled. If there is a problem with the batch, an error message is displayed and the totals are automatically corrected.

Barcode Entry

Pressing this button opens a pop-up window allowing the use of a barcode reader to read envelope numbers from either a sheet of paper or from an envelope. This can significantly speed up the entering of transactions when the contribution amount is the same. Further use of this window follows this section.

Find Household

To find a particular household or member in the scrolling window, use the quick jumps buttons below the list of households

Add or Modify

Add or modify envelope numbers to a household or to a member. Select either a Household Envelope or Member Envelope. Press the button **Add or Modify**. Control will pass to the appropriate window allowing envelope numbers to be added or changed.

Show Transactions

Use this option to make a correction to a transaction entered in error. A window opens and displays the transactions entered in the batch. When a transaction is selected it is placed back into the blue entry area of the contribution window. There it can be modified or deleted. The transaction is placed into the distribution window if it is not for the default fund.

Save

The **Save** button is used to store the entire contribution amount in the batch and assign it to the default fund. Remember, that until the batch is posted, the contribution information is not permanently recorded and assigned to the fund and contributing member.

Distribute

The Distribute button opens the **Distribution Maintenance** window. From this window, ***Revelations*** lets you allocate a single contribution across multiple funds. When viewing the contributions for this batch a transaction will exist for each distribution made.

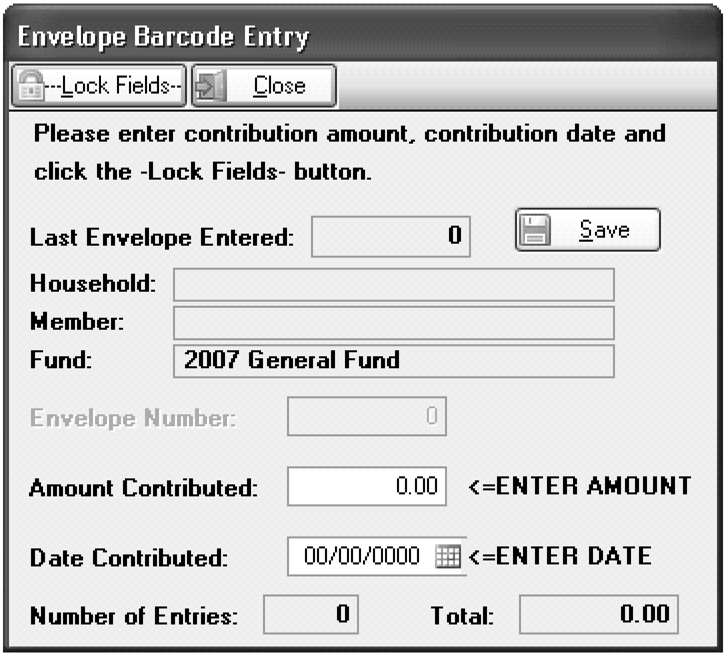
Remove

Removes the current transaction from the batch. A transaction is selected from the **Show Transaction** window and then removed using this button.

Receipt

A receipt can be printed for a single transaction. First, enter the transaction and save it. Then press the **Show Transactions** button and select the transaction you want a receipt printed for. Press the **Receipt** button to print the receipt.

Barcode Reader



This window appears by pressing the button **Barcode Entry** on the menu bar of Contribution Entry. This option can facilitate quick entry of transactions when they are all the same dollar amount. Enter the amount contributed and the date. Each time an envelope number is swiped with the bar code reader a contribution entry is recorded.

The barcode reader used must be capable of reading code 39 and have the ability to set a barcode terminator **carriage return**.

Electronic Contributions

Electronic Contributions is the automatic transfer of contributions from a household's checking or savings account to the church. This can simplify the contribution process and result in more regular giving. Revelations conforms to the specifications supplied by Vanco Services, Inc. out of Minneapolis, MN.

On a periodic basis, defined by you, an email with a file attachment is received from Vanco noting the contributors, funds, and amounts. Upon receiving the email double click on the attachment. It will ask where it should be saved. Save the attachment in the **data** folder located beneath the **church** folder (usually 'c:\church\data'). This email attachment is read by Revelations which converts it into a batch file for posting. No key entry is required.

Envelope List w/ Family ID's (Report)

Before emails can be received from Vanco, they need to obtain some information from the church. There are two reports that must be printed. The first report, **Fund List,** identifies the id numbers of the funds being given to. The second report, **Master Envelope Report w/ Family ID's,** lists the id numbers of all households and members that are assigned envelope numbers. Highlight with yellow marker those households and members that are participating in the direct deposit program, whether the envelope numbers are zero or non-zero. These two reports must then be sent to Vanco Services, Inc. along with the rest of the enrollment papers.

Note: These reports change with each new fiscal year, therefore, Vanco services must receive this new information as well.

Processing an Email file of Contributions

Proceed to 'Finance' – 'Funds & Pledges and press the button '**Enter Contributions**. The window 'Create or Select a Contribution Batch' will open. Press the button 'Import Batches' and select Vanco Services. This will open a window allowing you to locate the email attachment that should have been saved in the 'church\data\ folder when the email was opened.

Vanco Services Batches

Press the '**Browse'** button to locate the email attachment. Then press the **'Process Request'** button to edit the batch for accuracy and print out an edit report. If everything looks OK, select the option **'Edit Email and Create Batch File'** and press the **'Process Request'** button. A batch file will be created. It can be edited like any other batch file or it can be posted. That's all there is to it – you're done.

Vanco Services

Statistics show that church giving increases when people give electronically rather than via envelopes at Sunday worship. Vanco Services manages the electronic fund transfer process and provides the church with email reports and an email file that ***Revelations*** can import eliminating the need to hand enter the information into contribution batches. If you believe electronic fund transfer could be beneficial to your church you can contact Vanco Services, Inc at (800) 774-9355. They will ask for some information that is available from the reports noted below.

Preparation: Vanco Services must know the fund id's and participating household/member id's in order to email accurate information. To prepare this information, prepare the following two reports from Revelations.

Report # 1 – Fund List Report

The 'Fund List' report provides the Fund Id's of each fund that can receive contributions. Each year new funds are created with new fund id's and must be submitted to Vanco. This happens even though the fund name may be the same.

To prepare the Fund List report go to:

Reports – Financial Reports

Select the report in the scroll window called 'Fund List'

Press the Print button to begin printing

Report # 2 – Envelope List w/ Family ID's

The 'Envelope List w/ Family ID's' report identifies a 12 digit id number for every household or member that is assigned an envelope number of zero or non-zero. This is a unique number that never changes throughout the life of the household record or member record.

When viewing the id #, notice that the length of the number is seldom 12 characters long. This is because the value is made up of a 6 digit household id # followed by a 6 digit member id #. Any zeros to the left of the household id # are omitted. When the final 6 digits are zero that means that this id # belongs to a household rather than to a member of a household.

To prepare the 'Envelope List w/ Family ID's' report go to:

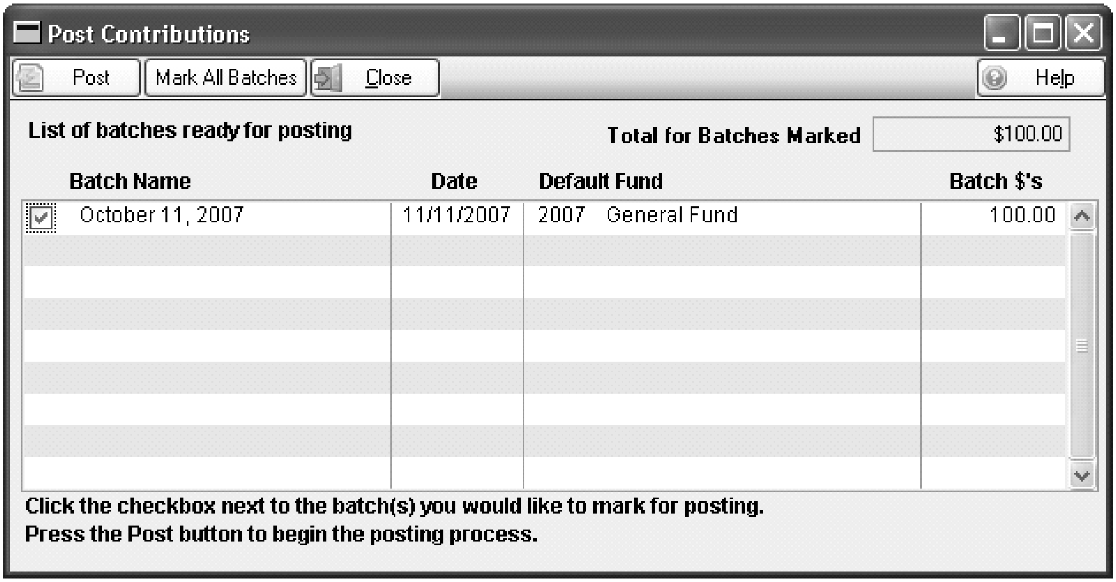
Reports – Financial Reports

Select the report in the scroll window called 'Envelope List w/ Family ID's'

Press the Print button to begin printing

Since everyone on the list is not a participant, it is necessary to highlight only those people who are going to participate. Vanco Services will only use information from the participating households/members. For more information go to the section titled Electronic Contribution.

Post Contributions



Access the **Post Contributions** window from **Finance – Funds & Pledges** and press the **Post Contributions** button. The window displays all batches having a value greater than $0. Batches are marked for posting by having their checkbox checked. Once the batches are selected, press the **Post** button at the top left to proceed with the posting process. After the batches are posted they are permanently removed from the database.

Once a batch is marked for posting it is no longer available on the scroll window of the **Contribution Batch** window. Uncheck the checkbox to make it available for editing.

A question about performing a backup will be asked after the **Post** button is pressed. Doing a backup to the hard drive is quick and if anything goes wrong during the posting process, performing a restore gets the database back to where it was prior to posting.

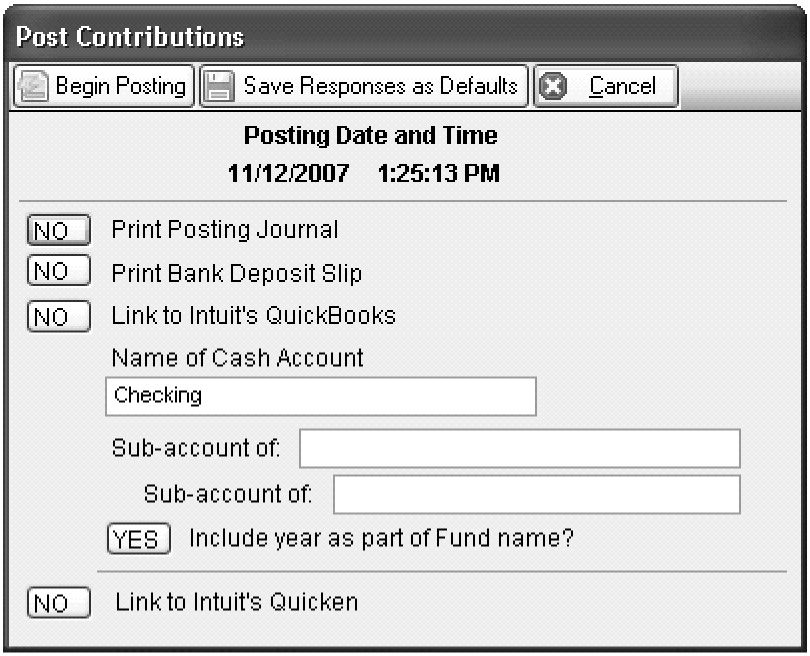
Background Posting

To request posting of the selected batches, click on the **Post** button at the top of the form. ***Revelations*** display the Post Contributions window. Click the **Begin Posting** button to initiate the posting process. Posting occurs in the background allowing other work to be performed at the same time.

Posting Errors

It is a good practice to post batches as soon as they are complete. The reason for this is envelope numbers can change, people can be removed, etc. Any of these activities can invalidate entries in a contribution batch. If an error is detected during the posting process, the entire batch is reversed out automatically and made available for editing.

Post Contributions



QuickBooks Link

Revelations can build a QuickBooks Import file. To link with Quickbooks, set the **Link To Intuits QuickBooks** response to Yes. Either accept **Checking** as the cash account or enter the bank account of your choice. If the account shown does not exist in QuickBooks, it will be created automatically. The cash account can be defined as a sub-account at either 1 or 2 levels deep by filling in the sub-account(s) field.

QuickBooks only imports account names. In this case, the account name would be the fund year plus the fund name. To omit the fund year from the transfer, set the **Include year as part of Fund name?** response to ‘No’ (this will accumulate all contributions to a single fund regardless of year). The maximum length of a fund name that QuickBooks can import is 30 characters.

When the QuickBooks link is configured, press the **Save Responses as Defaults** button to save the entries. Click **Begin Posting** to initiate the posting process. Take note of the journal number that appears on the heading of the journal report. The number is appended to "RV-" along with an extension of ".IIF to provide a meaningful file name that QuickBooks can import. This file will be located in the ***Revelations*** database folder (normally 'c:\church\data').

> Example: If the journal number was 43 the name of the import file for Quickbooks will be 'RV-43.IIF'. For Quicken the name will be RV-43.qif.

To import this file when in Quickbooks, select File, Import (QuickBooks 2000 is File – Utilities – Import). Change the directory reference to the church directory (normally C:\CHURCH\DATA). The import files will appear in the window. Select the import file you want. That's all there is to it. QuickBooks does not delete the import file when it is finished. This leaves the possibility that the same file could be posted twice. To avoid this, delete the file using Windows Explorer. If a file is posted twice, the duplicate entry is easily identified in the QuickBooks register. Select the duplicate entry and press Ctrl-D to delete deposit.

Revelations will work with sub-accounts in QuickBooks. To assign funds to sub-accounts, refer to the form Fund Maintenance. Access this form by going to **Finance** : **Funds/Contributions**, select a fund and press the **Add** or **View/Edit** button. Fill in the Major and Minor accounts as needed.

Quicken Link

The Quicken link was tested using Quicken for Windows version 5. The Quicken Link works the same as the QuickBooks link except it works as a cash basis accounting system.

Take note of the Journal Number that appears on the heading of the Journal report. The journal number is appended to "RV-" along with an extension of ".QIF to provide a meaningful file name that Quicken can import. This file will be located in the Revelations directory (normally 'c:church\data').

> Example: If the journal number was 43
>
> The name of the import file for Quicken would be 'RV-43.QIF'.

Note: As of 3-31-00 some Y2K problems existed in Quicken. The following problems have been noted and submitted to Intuit for correction.

> 1) The Quicken Import process ignores the posting date in the Import file and assigns the current date as the posting date
>
> 2) Imported transactions do not show in the correct chronological order on the check register.
>
> 3) The import file instructs the Quicken Import to establish the funds as class accounts so income statements can be run on each fund. Quicken does not define the funds as a class.

Remote Contribution Entry

Often times it would be of benefit to enter contributions from a remote site such as a home rather then going to the church and doing it. Using the remote entry of contributions only provides the ability to create batches and enter contributions for posting on the main computer at a later date. All other areas of Revelations are disabled during the remote entry of contributions at the remote computer.

Copy Envelopes and Fund Information

Selecting this option copies the files needed to create contribution batches at a remote location. The envelopes numbers (with names) and the fund list are the only files copied. Any new household you wish to assign an envelope number to should be added prior to this step.

Enter Contributions Remotely

Selecting this option opens a special section of ***Revelations*** for the entry of remote batches. Notice that you do not have control of the batch name. ***Revelations*** controls this aspect to insure data integrity and uniqueness of batch names when it comes time to upload the batch to the church.

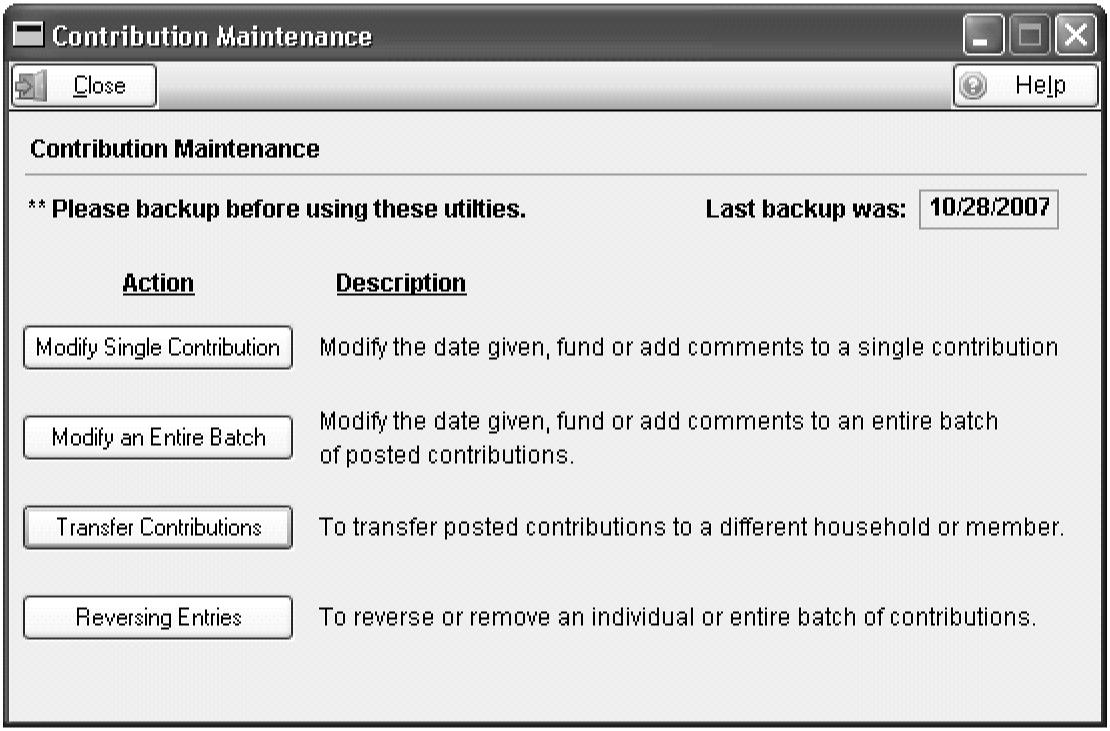
Copy Completed Batches

When the remote batches have been entered, it is necessary to copy the completed file back to diskette to post them back at the churches main computer. There are 4 files (fi0001.dat, fi0001.idx, fi0002.dat, fi0002.idx) located in the folder listed on the Remote Contribution Entry window. Copy these files to a diskette to be imported back into the main computer.

Import Completed Batches

From the **Upload Batches to a Church** window, press the **Upload Batches** button. Use this option to import the completed batches to the main computer for posting.

Contribution Maintenance



Have you ever entered a bad transaction date and then posted the batch before the error was caught? With Contribution Maintenance certain types of errors can be fixed on a single contribution or on an entire batch. Select **Finance – Contribution Maintenance** to open this window.

All the contributions for a household or for a member can be transferred to another household or member. This is especially helpful when two adults from two different households get married and you want to transfer a household's contributions to the new household.

Go to **Finance – Reversing Entries** to remove selected transactions or to remove an entire batch.

It is always a good idea to perform a backup before using this screen so the database can be restored if needed.

Special Buttons – Contribution Maintenance

Modify Single Contribution

Use this option when a date for a single transaction is incorrect.

Modify Entire Batch

Use this option when all the dates for a batch are incorrect. For ex: maybe a batch was posted with the year entered as 01-02-2006 instead of 01-02-2007

Transfer Contributions

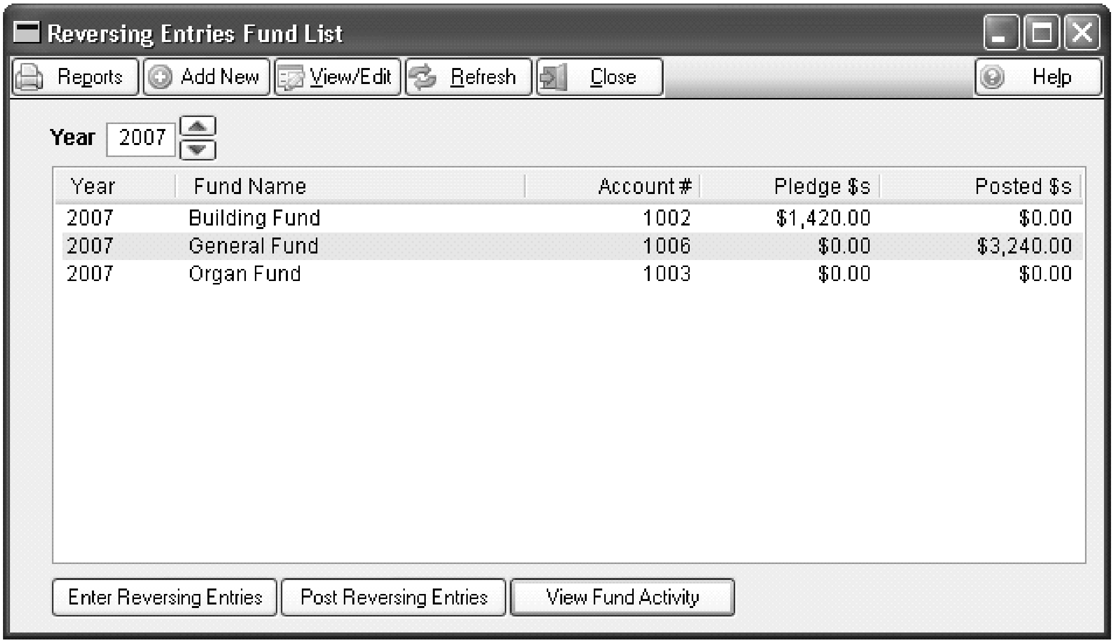
Transfers the contributions assigned from either a household or member to another household or member. This is useful when two households combine and their contributions had been previously entered as household contributions.

Reversing Entries

Access **Reversing Entries** from 'Finance – Reversing Entries'. Use this option when none of the above options apply. Either an entire batch can be removed or selected transactions can be removed.

Reversing Entries

Reversing Entries Fund List



Occasionally, batches or transactions within a batch may contain errors and are posted to the system. Now you want to remove them so they don't show up on statements. Use the Reversing Entry system to accomplish this. Press the **Finance** button on the menu bar and select **Reversing Entries**.

The **Reversing Entries Fund List** window includes a full list of all funds created for the church. Use this window to view previous reversing entries, to begin the process of creating a new reversing entry batch or to post an existing batch. To view posted reversing entries, select a fund and click on **View Fund Activity** at the bottom of the window.

Reversing Entries are prepared much like contributions. Press the button **Enter Reversing Entries** and a reversing entries batch window appears. Once a batch is prepared it must be posted. It is the posting process that actually removes the transactions. Corrected transactions are then entered normally through contribution entry.

Special Buttons – Reversing Entries Fund List

Refresh

The refresh button is used to redisplay (refresh) the window.

Enter Reversing Entries

Opens the **Reversing Entry Batch** window. A batch consists of one or more previously posted transactions that were posted in error. ***Revelations*** uses batches to enhance your ability to audit and track financial transactions.

Post Reversing Entries

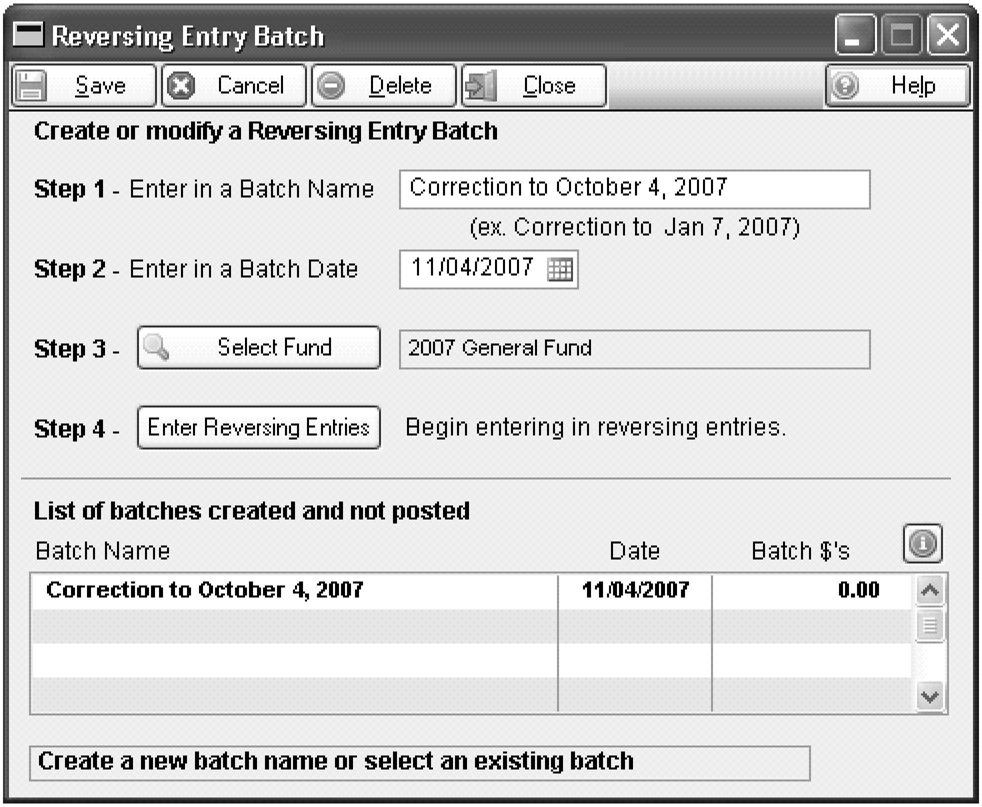
After marking all of the reversing entries for a given batch, the **Post Reversing Entries** button is used to post (permanently remove) these transactions.

When a batch is posted, ***Revelations*** removes the financial records from a household or member and transfers them into a reversal account. In addition, ***Revelations*** can create import files that can be used to link with either Quicken or QuickBooks.

View Fund Activity

The **View Fund Activity** button opens a window that allows all of the reversing entries recorded against the selected fund to be viewed.

Reversing Entries Batch



From the **Reversing Entries Batch** window, either create or select a batch for processing. In ***Revelations,*** all reversing entries are grouped together and processed as a batch. After creating a batch, proceed with the task of entering reversing entries by pressing the button **Enter Reversing Entries**.

Special Window Fields – Reversing Entry Batch

Batch Name

Step 1: Enter the name you want to give this batch. It is a good practice to apply a name that indicates the problem. Ex: JJ Anderson – wrong amount

Date

Step 2: Date on which the batch was created. This field becomes the posting date when used by Quicken and QuickBooks. Normally, the suggested date is the one that should be used as this is the actual date the batch was created.

Default Fund

Step 3: Press the **Select Fund** button to select the fund containing the erroneous transactions. When a split transaction is removed, it is removed from all funds that it was applied to.

Enter Reversing Entries

Step 4: Press this button to begin locating and marking posted transactions to be removed.

List of batches created and not posted

A list of batches that have been previously created but not yet posted. Once a batch is posted, the reversing entries within that batch are removed from the posted transaction list and added to a reversing entry file. The batch is then removed from the list of batches.

Special Buttons – Reversing Entry Batch

Save

Saves the current batch in the window **List of batches created and not posted**. You can return to the Reversing Entry Batch window at any time and select this batch for further processing.

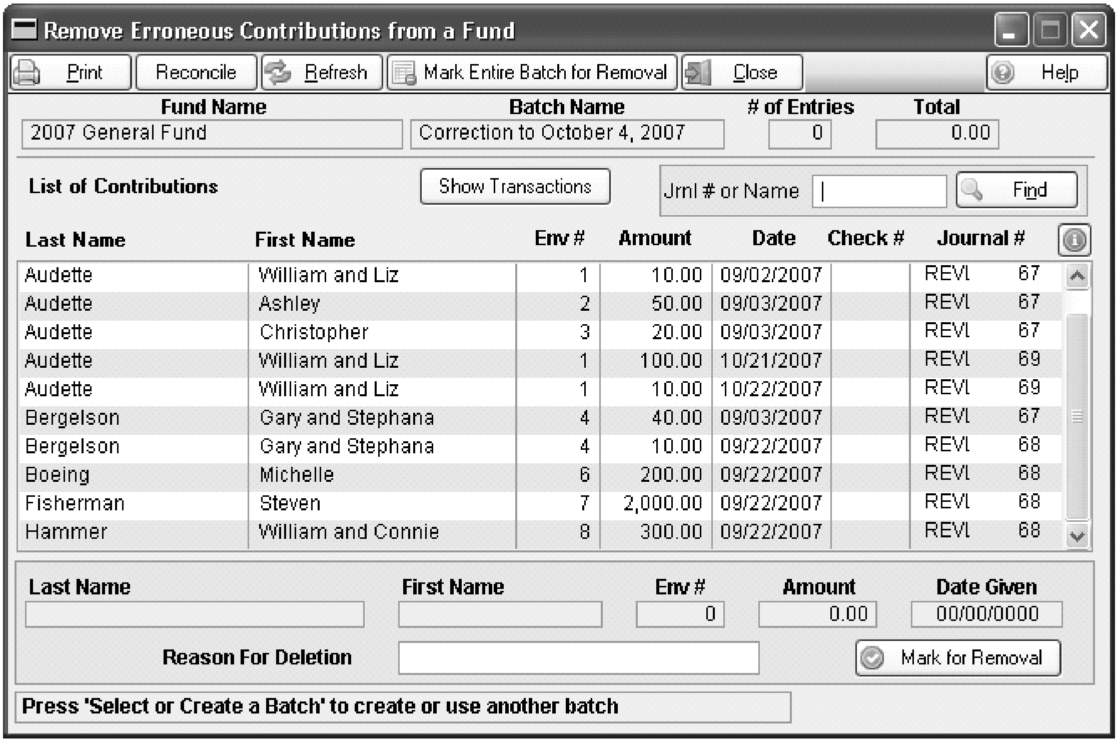
Cancel

Cancel clears any entries in step 1, 2, or 3.

Delete

To remove an unwanted batch, select the batch to remove from the bottom scroll window and press the **Delete** button.

Remove Erroneous Contributions



The **Remove Erroneous Contributions to a Pledge Fund** window is used to mark for removal erroneous contributions from the list of contributions previously posted to the selected fund. The name of the selected fund is displayed at the top of the window. To "back-out (or mark) a contribution, select the contribution in the top scroll window by clicking on the associated row. Enter a brief note describing the reason for deleting this contribution. Finally, add the transaction to the reversing entry batch by pressing the button **Mark for Removal**.

Sometimes a transaction to be removed was entered as a split transaction. That is, it was distributed to multiple funds. When the removal screen detects this, a window called **Multiple Distributions – Reversing Entry** is opened to show all the funds the transaction was applied to. Enter a reason for deletion and press the button **Mark for Removal**.

A marked transaction can be unmarked by pressing the **Show Transactions** button highlighting the transaction in the scroll window and pressing the button **Unmark for Removal**.

Special Window Fields – Remove Erroneous Contribution

Reason for Deletion

Reason that this entry is being removed from the fund. This is a required field.

Special Buttons – Remove Erroneous Contribution

Reconcile

Press this button to re-calculate the total dollar amount of the transactions marked for removal.

Mark Entire Batch for Removal

This opens a window where an entire batch that was previously posted can be marked for removal. This is especially useful if a batch had been entered twice and posted.

The journal number containing the posted batch must be known. If the journal number isn't known, it can be found by locating one of the erroneous contributions in the scroll window of the **Remove Contributions** window.

Mark for Removal

When the **Mark for Removal** button is pressed, the selected transaction (from the List of Posted Contributions) is marked as a reversing transaction. This transaction and all other transactions in this batch will be removed from the funds during the posting process.

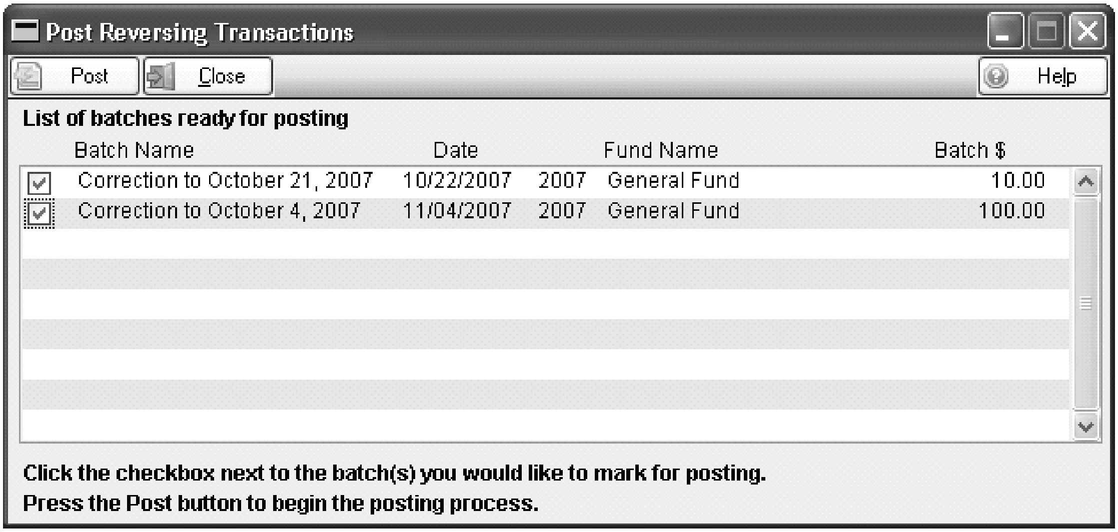
Unmark for Removal

The **Unmark for Removal** button removes a selected transaction from the batch. To unmark a transaction, click on the **Show Transactions** button and select a transaction from the scroll window. Click the **Unmark for Removal** button to remove the record from the list of transactions to be reversed.

Show Transactions/Show Contributions

Switches the view of the contributions entered for the fund to those marked for reversal.

Post Reversing Entries



The **Post Reversing Transactions** window is used to select batches for posting. This window contains all active batches having a value greater than $0. Batches are selected for posting by checking the checkbox to the left of its name. Press the **Post** button to proceed to the window **Post Reversing Transactions** where posting is initiated.

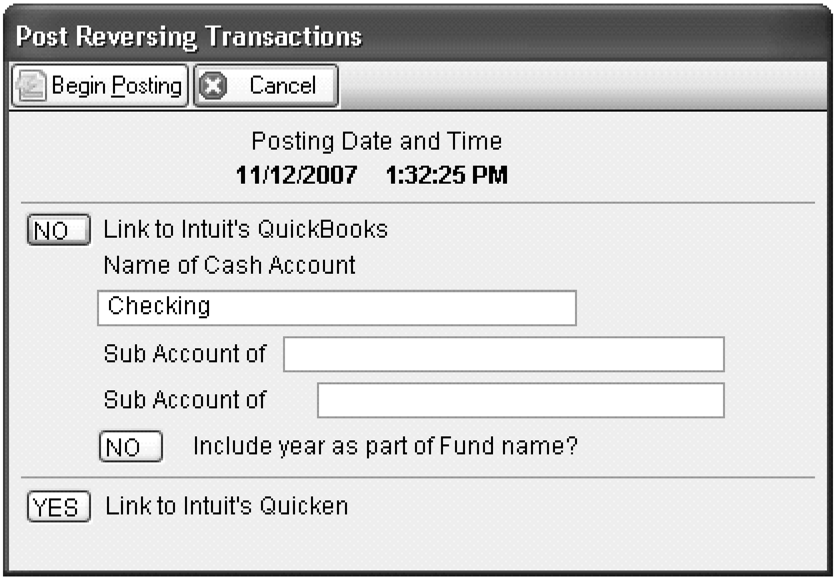
Batches are used to group contributions to ease the process of review and editing. After a batch is validated, the posting process permanently records the reversing entries to the appropriate member, household and fund.

Special Buttons – Post Reversing Entries

Post

After a batch(es) is selected for posting, the Post button is pressed to proceed to the window **Post Reversing Transactions** where posting is initiated.

Post Reversing Batch



Use this window to begin the posting process and to enter any account information required to reverse these dollar amounts from either Quicken or QuickBooks.

QuickBooks Link

If you have QuickBooks 2.0 or later, ***Revelations*** can build a QuickBooks Import file. To link with QuickBooks , set the **Link To Intuits QuickBooks** response to ‘Yes’. Either accept ‘Checking’ as the cash account or enter another account name. If the account does not exist in QuickBooks, it will be created as part of the import process.

QuickBooks only imports account names. In this case the account name would be the Fund year plus the Fund Name. To exclude the fund year to be transferred to QuickBooks, set the response “Include year as part of Fund name? to ‘No’.

Click **Begin Posting** to initiate the posting process. Take note of the journal number that was assigned to this posting. It can be found on the heading of the ‘Journal Report’. The journal number is appended to "RV-" along with an extension of ".IIF to provide a meaningful file name that QuickBooks can import. This file will be located in the ***Revelations*** directory (normally 'Church\Data').

Example: If the journal number was 43, the name of the import file would be 'RV-43.IIF'.

To import this file into QuickBooks , select **File**, **Import** (QuickBooks 2000 is File, Utilities, Import). Change the directory reference to the ***Revelations*** church directory (normally C:\CHURCH\DATA). The import files will appear. Select the file to import. That's all there is to it. QuickBooks does not delete the import file when it is finished. This leaves the possibility that the same file may get posted twice. To avoid this, delete the file using Windows Explorer. If a file is posted twice, the duplicate entry is easily identified in the QuickBooks register. Select the duplicate entry and press Ctrl-D to delete the deposit.

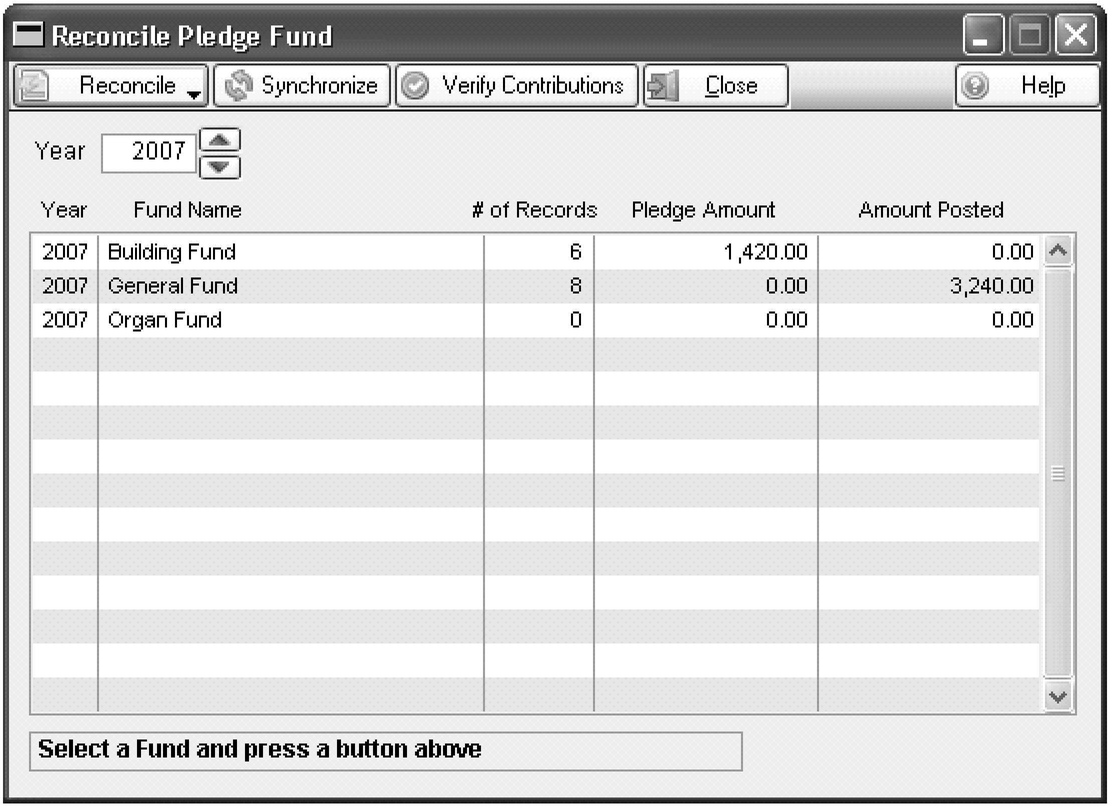
Quicken Link

The Quicken link was tested using Quicken for Windows version 5. The Quicken Link works the same as the QuickBooks link except it works as a cash basis accounting system.

Take note of the journal number that was assigned to this particular posting. It can be found on the heading of the journal report. This number is appended to "RV-" along with an extension of ".QIF to provide a meaningful file name that Quicken can import. This file will be located in the Revelations directory (normally 'Church\data').

Example: If the journal number was 43, the name of the import file would be 'RV-43.QIF'.

Reconcile



The reconciliation process reviews the accuracy of a selected fund, its pledges and the contributions to that fund. Any errors detected will be fixed if possible. A report is printed indicating what transactions were in error and the correction made as part of the reconciliation process. Select **Finance – Reconcile** to open this window. It is a good practice to perform a backup before running this program.

Reconcile

Select the fund to reconcile from the scroll window and press the **Reconcile** button. Reconcile performs the following tests:

1. Verifies all contributions have an associated pledge record. This is required even when a church does not record pledge information.
2. All recorded names are checked for accuracy to the household and member files
3. Pledge totals are recalculated for accuracy
4. Verify that the contribution total is equal to the total on the pledge commitment file.

Synchronize - This initiates a process of checking the envelope number on each contribution received making sure it matches that last number issued. This is helpful when a church issues a value of zero to visitors and then changes it to a non-zero value when they join the church. While ***Revelations*** keeps track of these changes, it doesn't change the historical records.

Verify Contributions – This process reviews each contribution on file and verifies the fund it represents exists and that the total dollar of all contributions equals the total dollars posted.

Special Buttons - Reconcile

Reconcile

After selecting a fund, click the **Reconcile** button to initiate the reconciliation process.

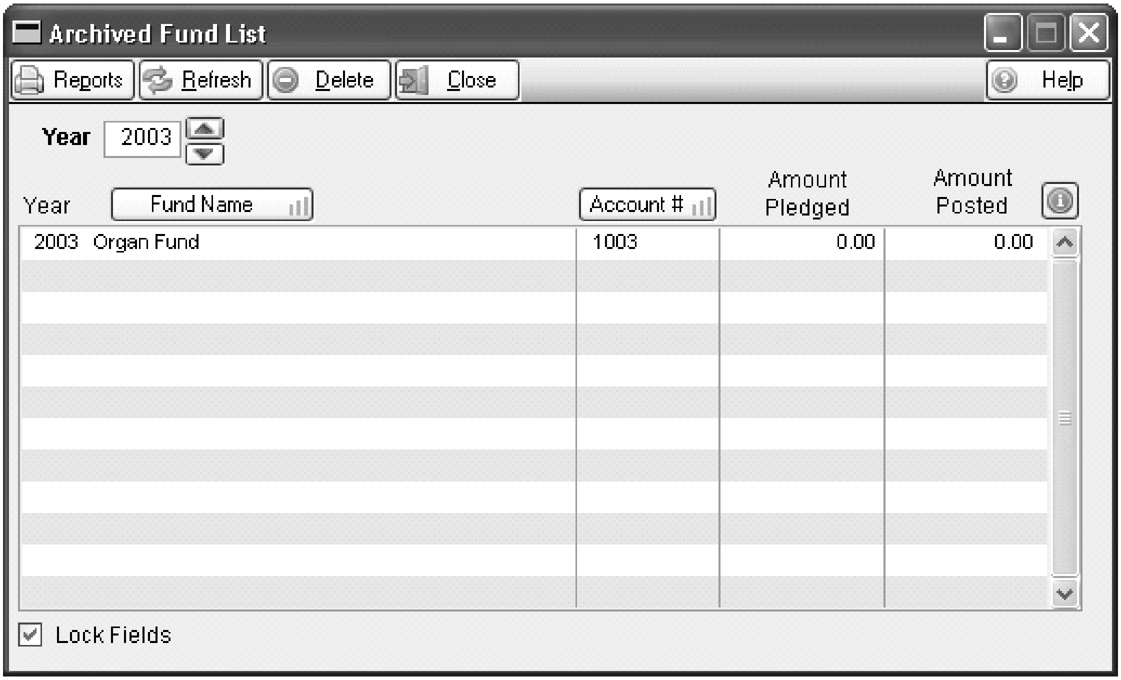
Synchronize

Reviews all the envelope numbers and changes any old numbers assigned to the most recent assignment

Verify Contributions

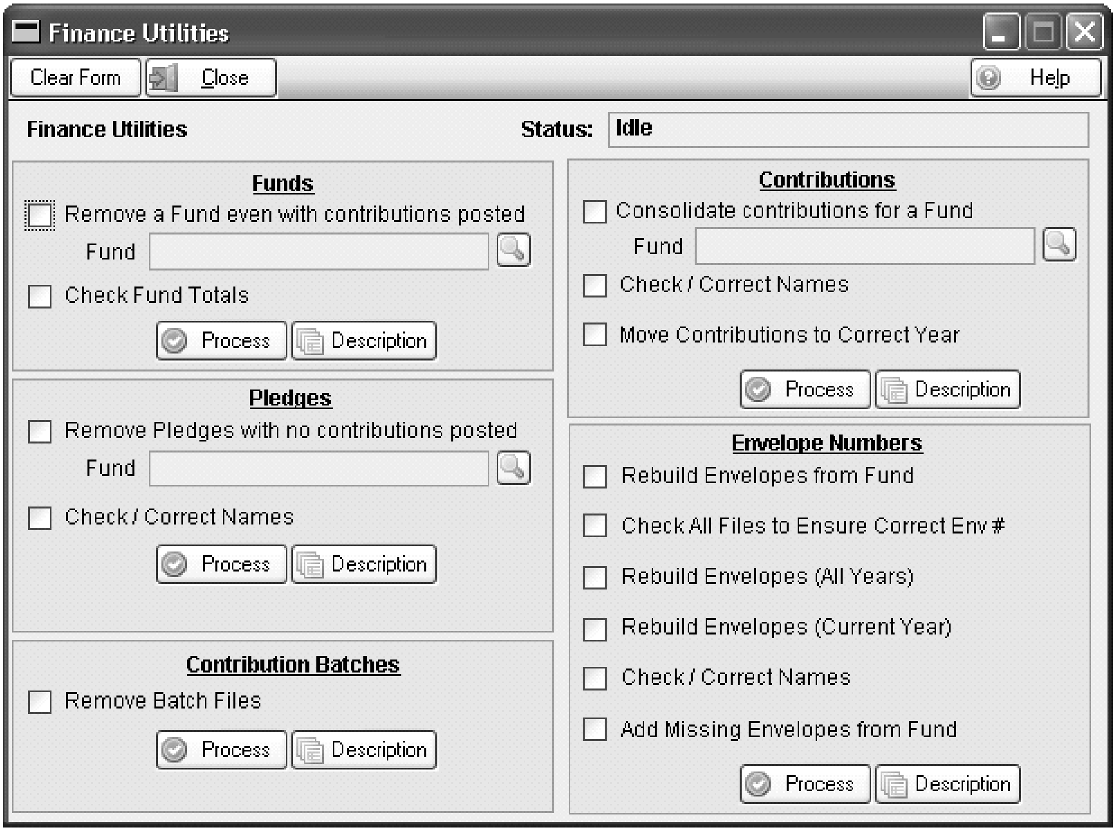
Reads all the contribution records and totals them by fund. Those totals are then compared with the fund posting totals. Any discrepancies are reported.

Archives - Funds



Displays all the funds that have been removed from the database and marked for archiving. A fund is marked for archive at the time it is deleted from the database. Note the **Locked Fields** checkbox at the bottom of the window. When unchecked the fields of a fund can be modified. Use this with care as once they are changed there is no way for ***Revelations*** to re-calculate the values.

Finance Utilities



The **Finance Utilities** form is designed to perform periodic database maintenance on the financial portion of ***Revelations***. The form is divided into 5 sections with each section containing a **Description** button defining the action that will take place when the **Process** button is pressed.

When operating on a local area network with other users, it is a good practice to have them exit the financial section before performing any of these options. It's also a good practice to first perform a backup just in case you want to return the database back to its original status.

Reports

Revelations Reporting

Membership Reports

Financial Reports

Custom Reports

Statements

Labels & Merging

Phone Tree

Olan Mills Merge

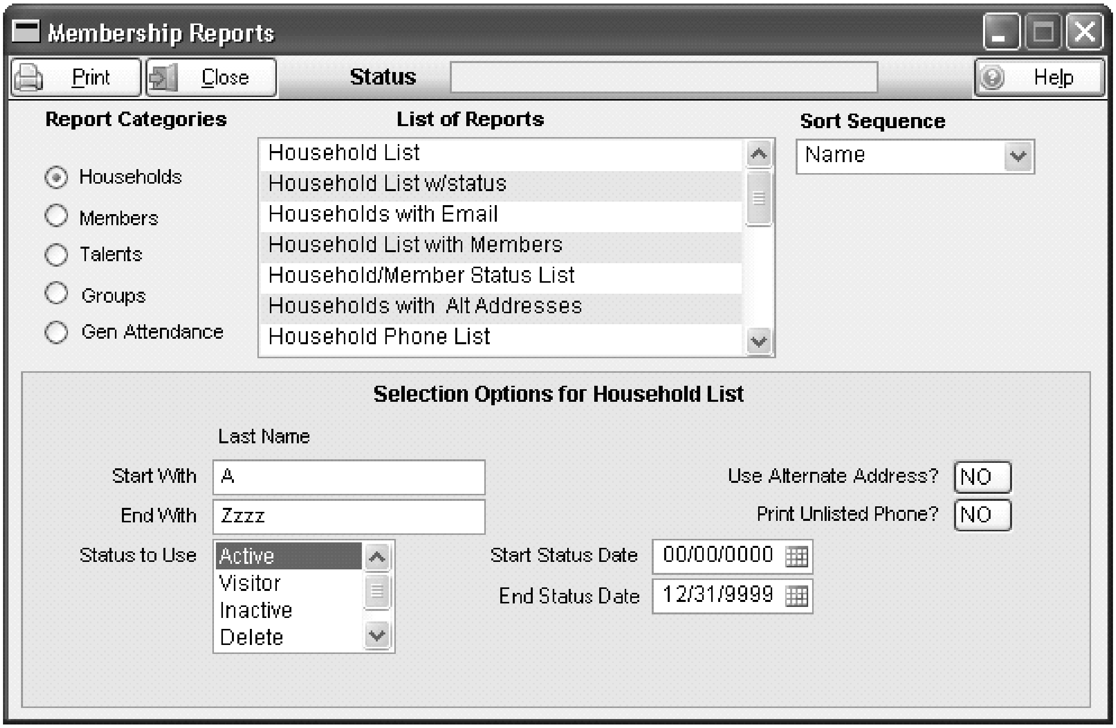
Graphs

Pictorial Directory

Modified Reports

Reports

Membership Reports



The **Reports** window serves as an online catalog for the reports generated by ***Revelations***. All of the reports are broken into categories for easy access. After selecting a report category, a complete list of associated reports is displayed. To print a specific report, select the report from the scroll window and enter the associated parameters. The parameters (shown at the bottom of the window) change based on the particular report being generated. While most of the reports are available from this section there are some reports only available from the form that produced the information.

Church Directories: Under the Households category there are 4 different church directory formats from which to choose from. By printing a restricted range of households to the screen you can quickly see which format you like the best. Additional formats can be prepared using ***Revelations*** and either Microsoft Word or WordPerfect. To do this go to **Reports - Labels & Merging** and select **Church Directory Merge.** The **Label Type** provides 3 different reporting options. Complete the restrictions and press the **Export File** button. An export file will be created. Wait for the message “Church Directory

Complete" before proceeding to the **Direct Link** button. Once in your word processor make any report adjustments and perform a 'Merge to new document' to print the directory.

The first line of an entry is the household salutation. For married couples both of their names should be in this field. Below the salutation are the children or other members of the household. To appear here they must have a relationship other than husband, single male, widower, wife, single female, widow, or divorced.

Special Window Fields – Membership Reports

Report Categories

The reports in ***Revelations*** are separated into categories. To access a particular report, choose the appropriate category. The categories are Household, Members, Talents, Groups and General Attendance.

List of Reports

The **List of Reports** changes based on the report category selected. Click on the associated row in the scrolling window to select a report.

Sort Sequence

The sorting sequence the report information will be sorted in.

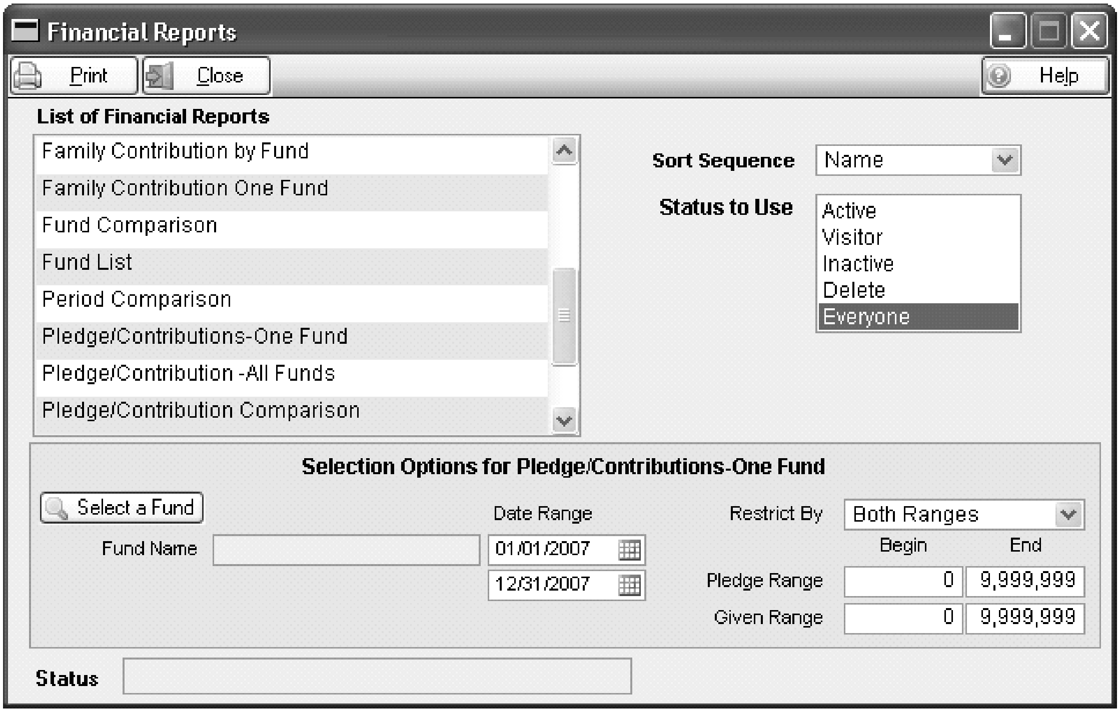
Selection Options

The **Selection Options** at the bottom of the window changes based on the report selected. To choose multiple status codes for a report, highlight your first choice by clicking on it, then hold down the CTRL (Control) key click and click on other choices. Status codes can be toggled off and on using the control key and the mouse.

Select Button

If a report requires the selection of a particular fund, household, group or talent, the **Select** button will be displayed in the report parameter's section of the window. Click the **Select** button to choose the appropriate reporting criteria.

Financial Reports



The Financial Reports window lists several types of financial reports that can be generated. The reports range from fund listings to detailed reports showing household and member contributions.

Contribution statements are not printed from this form. To print statements go to **Reports – Statements**.

Special Window Fields – Financial Reports

List of Reports

Select a report to print by clicking anywhere on the report name in the scroll window.

Sort Sequence

The sort sequence options.

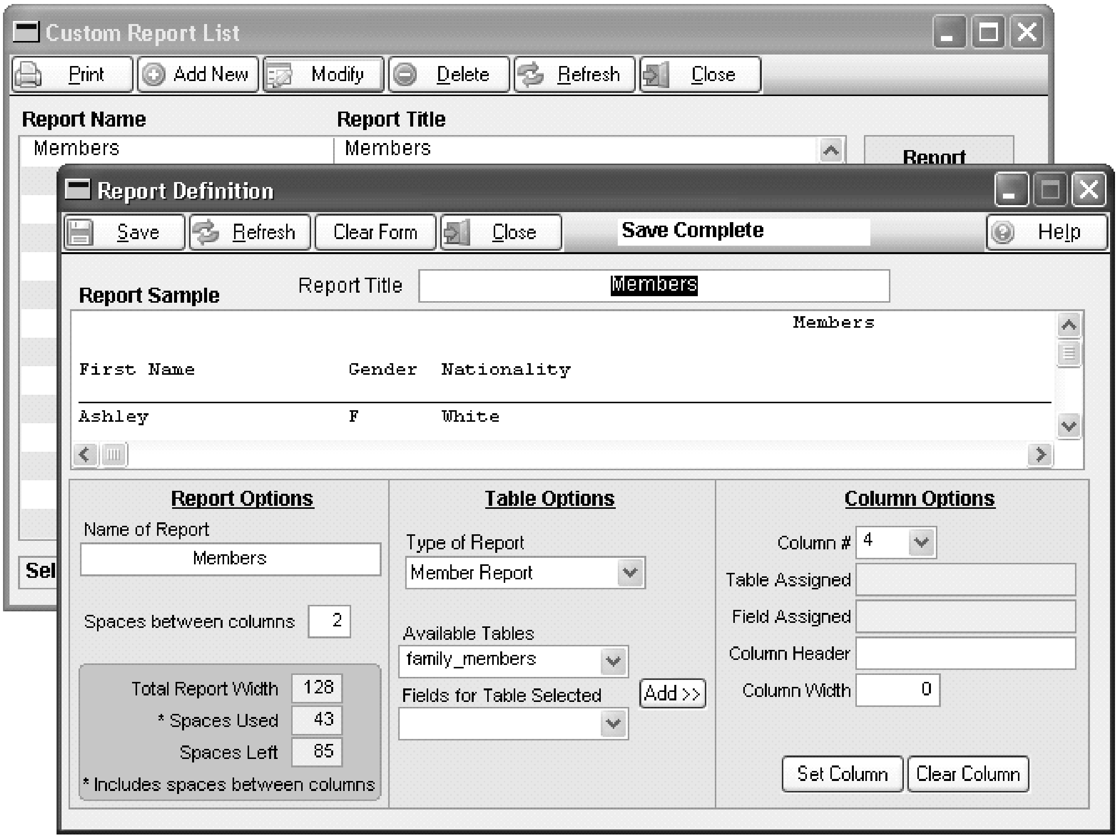
Selection Options

The Selection Options at the bottom of the window changes based on the report selected.

Select a Fund

If a report requires the selection of a particular fund, household, group or talent, the **Select** button will be displayed in the report parameter's section of the window. Click the **Select** button to choose the appropriate reporting criteria.

Custom Reports



The **Custom Reports** form provides the ability to create ad hoc reports. The files you have access to are: Household, Family Member, Special Events, Alternate Address, Member Groups, Groups and Group Category file. Restrictions and Sort sequences can also be defined.

The intent of Custom Reports is to provide a way to quickly extract information from the ***Revelations*** database that isn't available from the standard set of ***Revelations*** reports and without having to purchase the Report Writer option.

The scroll window keeps track of all the reports that have been created. To create a new report, press the **Add New** button. To use the **Modify, Restrictions, Sort,** or **Delete** button, it is necessary to first select a report from the scroll window. The **Refresh** button re-fills the scroll window with the latest data.

Special Buttons – Custom Report List

Add New

Opens the **Report Definition** form for a new report to be created

Modify

Select a report in the scroll window to modify and press this button.

Restrictions

Select a report in the scroll window to apply restrictions to. A window opens allowing the restriction to be defined.

Sort

The sequence the records are printed in can be changed using this button. A window opens allowing the sort fields to be selected. The sort operates using the first field and works downward when multiple sort fields are selected.

Window Features – Report Definition

This screen is used to define the report files that will be used, the fields contained on the report, titles, report name, and spacing. The name of the report must be unique and the width of the report cannot exceed 128 characters. A maximum of 10 fields is allowed in the body of the report.

Fields added are defined as column 1 through column 10 and are added from left to right. Fields cannot be inserted between columns. To insert a field requires that the fields to the right be deleted.

Table Options

Select the type of report using the **Type of Report** drop down list. For ex: if the report is to list member information, select 'Member Report'. The files listed in the **Available Tables** drop down list are dependant on which report type was selected. It contains any file that can be joined (or linked with) the report. Lastly, the **Fields for Table Selected** drop down list contains the fields belonging to the selected table. Select a field and press the **Add>>** button.

Column Options

The column number points to the next available column on the report. To replace an existing column, change the column # to the column being replaced, select a new field and press the **Add New** button. The Table Assigned and Field Assigned fields are reminders of the field you are working with. The **Column Header** appears above the field on the report. The column width will be the larger of the Column Header or the field itself. If the column width is made smaller then the header or the data value, the report will truncate the field and header to the stated size. Press the **Clear Column** button to erase the field selection.

Special Buttons – Report Definition

Set Column

After the ‘Column Options’ fields are filled out, press this button. The report writer will obtain some sample data and refresh the **Report Sample** giving an idea of what the report will look like.

Clear Column

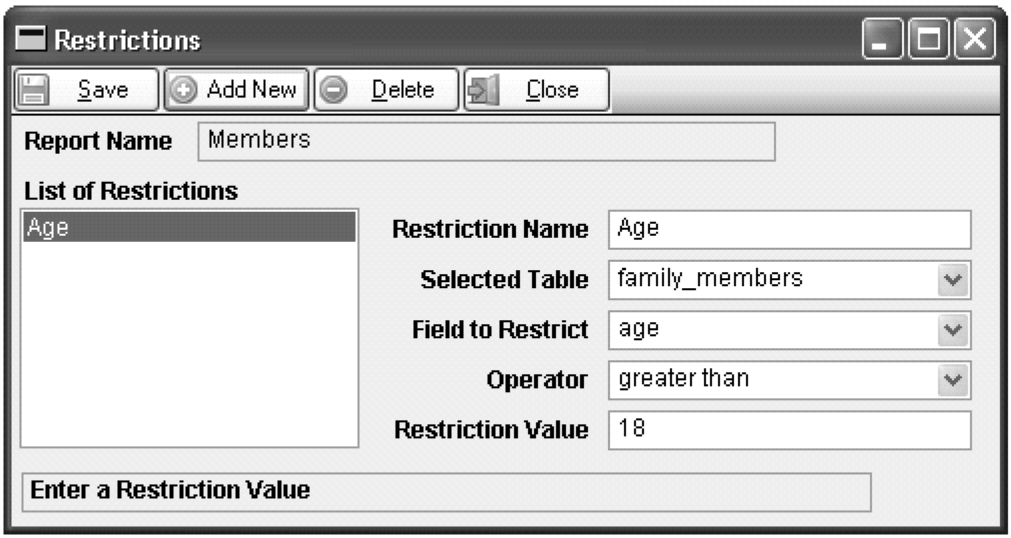
Clears the entries under the **Column Options** section and removes it from the report. Only the last column on the report can be erased.

Save

Saves the report definition.

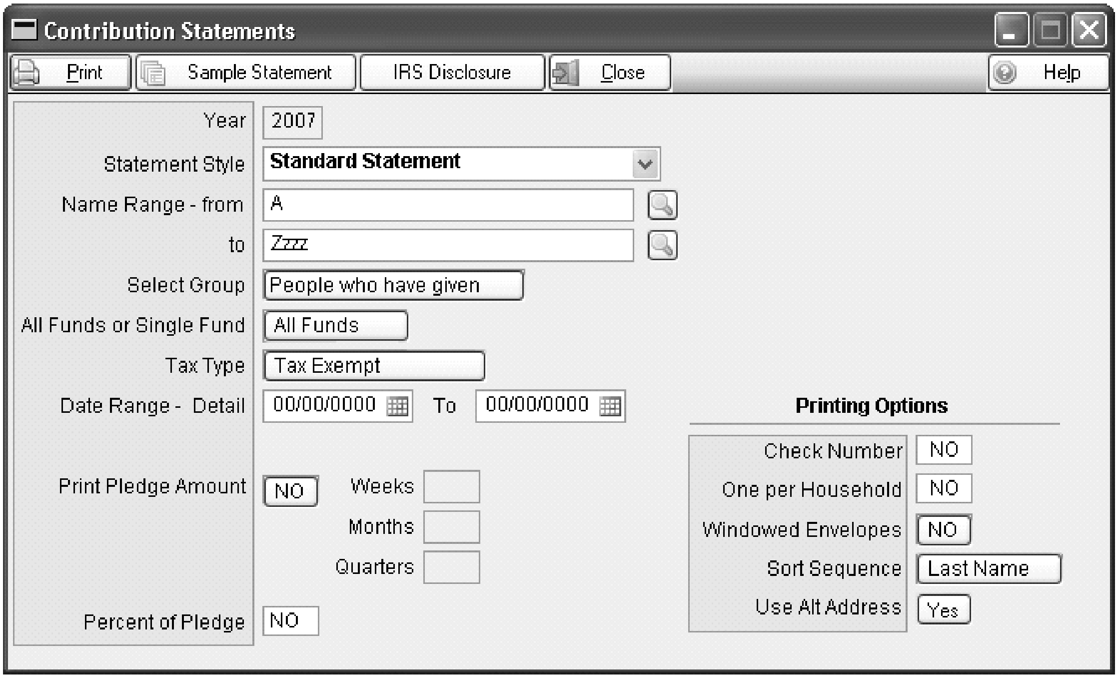
Clear Form

Clears the entire form. All entries are erased. The entries can be recovered by closing the window without pressing the **Save** button and re-selecting the report.



Use the **Restrictions** button on the **Custom Reports List** window to limit the types of records that will be printed. Give the restriction a name, select the table the holds the field to be used in the restrictions, select the field and the operator and finally enter the restriction value. Press the **Save** button. Multiple restrictions are allowed and they are processed from the top down.

Contribution Statements



The Contribution Statements window is used to prepare statements for households and members who contribute and for those who do not contribute. A statement can be prepared for any period of time and it can be printed for all funds during that period or to a selected fund during that period.

The 'Single Fund' statement was designed for special fund drive funds such as a Building Fund covering more than on year. Access to a single fund statement is available from the 'Standard Statement' or the 'Detailed Statement Vertical'.

Statement Style

Use the **Statement Style** to select the statement format. To print mailing labels to match the reports, select a report type of mailing labels. The fields defined below are for the 'Standard Statement – Extended. Not all the fields are used by the other statement options.

Use the **Lookup** button to select a single family or a small range of households. This is a good way to see what statement looks like.

Contribution Statements for a Single Fund

To print a statement for a single fund, set the 'Statement Style' to 'Detail Statement Vertical' and press the button **All Funds**. A pop-up window opens from which a fund can be selected (Note that the beginning date is not relevant for this report). All contributions are reported from the beginning up to the ending date entered. Use the **IRS disclosure** button to enter an appropriate message for this report.

Sending a letter to non-givers

To prepare a letter to non-givers, set the 'Statement Style' to "Standard Statement" and press the button **People who have given**. The button **Statement Letter** will appear. Press it to create the message to be sent to this group. A non-contributor is one who has either made a pledge or has been assigned an envelope number but hasn't made a contribution during the time frame specified.

Printing separate statements for each contributor in a household

Set the option 'One per household' to 'No'. This will result in a separate statement to be printed for each envelope number assigned to the household and its members provided they gave during the date range specified. When this option is yes, then one statement will be printed with each envelope # being reported on the statement and separate totals given.

Bulk Mailing

To qualify for bulk mailing postage rates it is necessary to follow certain USPS guidelines. Every mail piece must contain two statements: 1)"This is not a bill or statement" and 2) "Your continued contributions are greatly appreciated". Every statement must be of the same format meaning that statements to givers cannot be combined with letters to non-givers. Set the option **Bulk Mail Comment** to 'Yes' to have these lines printed on each statement.

Window Fields – Contribution Statements

Report Type

Use the **Report Type** field to specify the type of output to be generated. Report types are:

- Standard Statement - Extended
- Standard Statement (default)
- Consolidated Statements
- Detailed Statements – Vertical alignment
- Detailed Statements – Horizontal alignment
- Statement with Remittance
- Mailing Labels
- Merge for Letters

'Merge for Letters' can be used to send a mailing to either people who have given or to people who haven't given. Only households or members that have been assigned an envelope number of zero or non-zero are considered for this report. Instead of printing this to paper send it to a text file and use your word processor to prepare a merge letter.

Name Range

Type up to 20 characters of the household last name that define the range to be included in this report. Use the **Lookup** button to select a single household or a small range to print. Use the default entry to print statements that includes all the households.

NOTE: When sorting by zip code the range must be set to a numeric range to reflect the zip code format.

Lookup

Specify a range of 1 or more households to print.

Status to use

This field is only available on the Standard Statement – Extended. Multiple status selections can be made by holding down the **Control** key when making selections.

Select Group

This option is only available on the 'Standard Statement' and 'Standard Statements – Extended'. Click on the selection to change it.

Standard Statements – Extended: This field is used in combination with the 'Status to use' field. Ex: If the 'Select Group' is set to 'All Households' and the 'Status to use' field is set to Active a statement will be printed for every household with a status of Active and for every member with a status of Active who is assigned an envelope number even if their household status is not set to Active.

When selecting the **People who haven't given** option, a report is produced that will be sent to church members that have not contributed (either to a specific fund or all funds) during the date range specified. Rather than a statement, ***Revelations*** prints a letter. Click on the **Statement Letter** button to type in the message that is to be printed.

Standard Statement: When selecting **People who have given**, contribution statements are produced for church members who have made contributions to the church during the date range entered. A statement will not be prepared for people who haven't given even if they have pledged.

Statements to givers and to non-givers can be printed and included in the same bulk mailing using 'Standard Statement – Extended' with the **Select Group** set to **All** Households.

Primary Fund (Standard Statements – Extended only)

When a statement is printed to a non-giver the fund selected as the primary fund will be printed with an amount of zero dollars contributed. Revelations automatically selects the most active fund. Press the button ‘Primary Fund’ to change the selection.

All Funds or Single Fund

When this parameter is set to “All Funds”, the system generates contribution statements that include donations for every church fund during the time period specified. If the parameter is set to “Single Fund”, Revelations generates contribution statements for only the selected fund.

To change the selection (between Single Fund and All Funds), the ‘Statement Style’ must be set to ‘Detail Statement Vertical’ or ‘Standard Statement’.

Tax Exempt or Taxable Funds

Statements are printed for either tax exempt funds or for taxable funds but never for both on the same statement. Change the IRS Disclosure statement depending on the selection made.

Date Range Detail

The **Date Range** fields are used to specify starting and ending dates. The report parameters (report type, single/all funds, have/haven’t given) will be used within the confines of this date range to select members that meet the report criteria.

For single funds the beginning date value is assumed to be the fund start date.

Summary (Standard Statements – Extended only)

Using this option to print the contributions by fund for a specific period of time plus the total amount given to each fund. Ex: Use to print a statement for the second quarter showing each contribution and to show total giving since the beginning of the year.

Print Pledge Amount for this period

Select 'Yes' to print the pledge amount on the statement. It will be averaged for each fund according to the time period specified. The system will calculate the number of weeks, months, and quarters that occurred in the date range specified. Any of the period values can be changed if they are not correct.

Percent of Pledge

Includes the contribution amount as a percent of the pledge amount.

Print the Check Number

When set to ‘Yes’ check numbers are printed on the statement.

One per Household

Select “Yes” to send one contribution statement to a household for contributions made by all family members. Select “No” to send a contribution statement to each family member that has an envelope number and has made a contribution to the church.

Include Bulk Mailing Requirements

Select "Yes" to comply with the United States Postal Service Bulk Mailing requirements. This will add the following text as required by the USPS: "This is not a bill or statement" and “Your continued contributions are greatly appreciated” to the statements.

Windowed Envelopes

Changes the format of the statement so it will display the name and address in an envelope #10 window.

Sort Sequence

Select the sorting sequence of the statements generated by the system. Choose between name and zip code sort sequences. When zip code sequence is used, the name range should be changed to a numeric zip code range otherwise all statements may not print.

Special Buttons – Contribution Statements

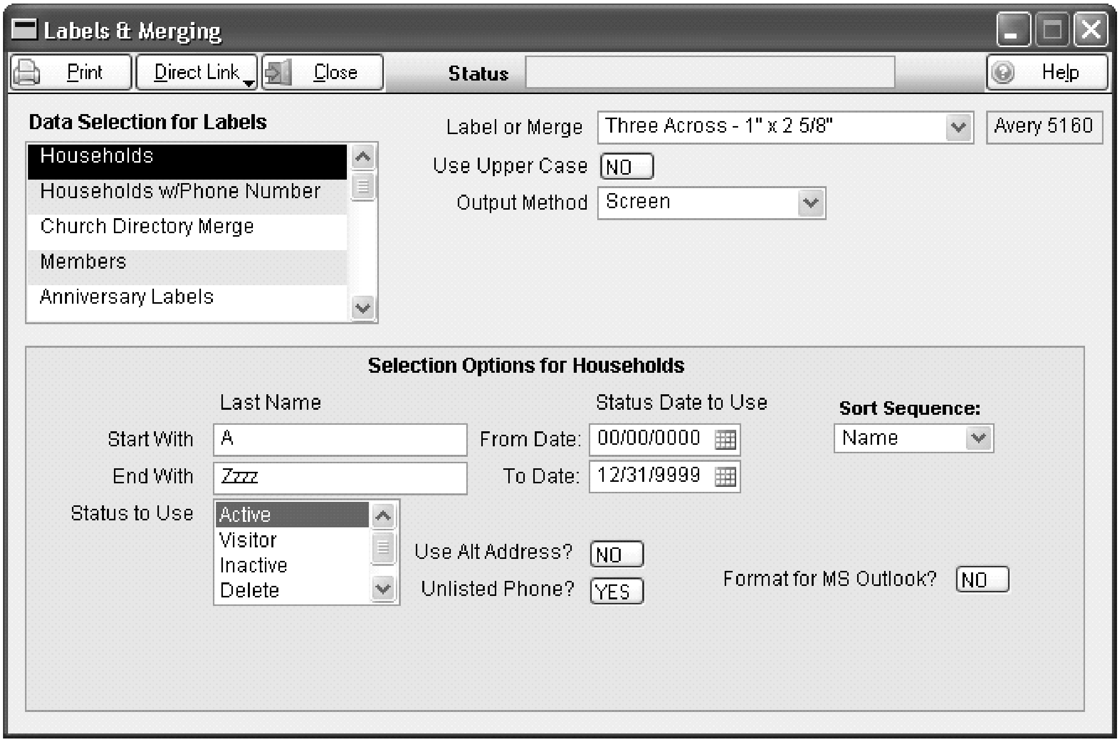
Sample Statement

The **Sample Statement** button generates a single sample contribution statement for review. A blank statement may print if the first household in the list did not contribute during the date range specified.

IRS Disclosure

Click the **IRS Disclosure** button to display the window of the same name. Enter the IRS (tax related) message that is to print on each contribution statement. A standard IRS Disclosure message is provided by ***Revelations***.

Labels – Merging



The **Labels & Merging** window is designed to produce labels for church members in many different ways. This window may be used to produce:

- Printed labels using different formats. Select the **Label Type** field to review the different formats that can be generated.
- Name tags
- Envelopes
- Letters
- Export Files (or Merge Files) to be used with a word processor.

Labels can be printed from within ***Revelations*** or from your word processor. To print from your word processor, an export file must be created by changing the 'Output Method' to 'Export File' followed by pressing the **Export File** button. Wait for a 'file complete' message to appear indicating the export file has been built. Then press the **Direct Link** button to link the file to your word processor.

Church Directory Merge

'Church Directory Merge' provides the option to format your own church directory or **Rolodex** cards using either Microsoft Word or Word Perfect. After setting the parameters (be sure to set the directory type using the **Label or Merge** dropdown) and press the **Export File** button. An export file is then built. The field 'Data File for Labels' show the location and name of the file created. The message 'Church Directory Complete' is displayed after the file is prepared. Press the **Direct Link** button and choose your word processor. ***Revelations*** automatically opens the word processor in merge mode and links the created file to the document. Using your word processor, font sizes etc. can be modified and fields can be removed or added.

Rolodex Cards

Rolodex cards are available from the same data file that is produced for the church directory. Select **Church Directory Merge** from the scroll window and then select **Rolodex** from the drop down on the top right called 'Label or Merge'.

Palm Pilots and Microsoft Outlook

Often times it is desirable to transfer information contained in the Revelations database to other products such as a Palm Pilot or Microsoft Outlook. Select **Households** to build a file of household information that can be exported or select **Members** to build a file of member information. Set the **Output Method** to **Export File** and any other parameters you want. Then press the button on the menu bar titled **Export File**. When the file is built a message 'Export File is Complete' will appear. The name of the file created and its location is shown on the window next to the prompt 'Data File for Labels'. These files can then be imported into Microsoft Outlook.

Selecting multiple status codes

Multiple status codes can be selected by holding the Ctrl (Control key) down and clicking on the desired status code. The status codes will toggle on or off.

Creating automated word processing documents

Example: To produce a letter to a group of church members (ex: birthday letters for the last month).

First we create an Export File or Merge File. To create this file, select the option of 'Export File' in the **Output Method** field. After filling out the available options in the bottom half of the window, click the **Export File** button to create the export file.

Wait for a message indicating the building of the export file is complete. With the export file complete, click **Direct Link** and select the desired word processor. ***Revelations*** automatically starts your word processor and links the export file to the document type selected.

For mailing labels select the 'Merge to new document' and the mailing labels will be prepared. For writing a letter, prepare the letter inserting the merge fields where you want and then select the 'Merge to new document'.

Printing Name Tags

Name tags are only printed in a one up format. Before printing, go to Print Setup and use the 'Custom Setup' to confirm the size of the labels. ***Revelations*** assumes the size of the label is 2 5/16 by 3 1/2. The height of the label is more important than the width. If problems are encountered using this method, change the Output Method to 'Export File' and press the **Export File** button. Then use the **Direct** Link button to call up your word processor and produce the name tags.

Conversion File Format

After selecting an option under the **Direct Link** button, the selected word processor will link itself to the export file created by ***Revelations***. During this process it may pop a Convert File Format window and ask for the type of file.

For Microsoft Word and Works select the default of 'TEXT'.

For Word Perfect, scroll up using the scroll bar and select ASCII(DOS)DELIMITED.

Error: 'Bad file pathname for output'

This error will occur if the **Export File** button in ***Revelations*** was pressed and the word processor is still open with the same file being accessed.. To correct, close the word processor, return to ***Revelations***, and click the **Export File** button again.

Error: Microsoft Word cannot find the hse_lbl.txt or mem_lbl.txt Export File

When Microsoft Word reports this error, locate the text files by setting the pathname to c\:church and press OK. Select the file type of "*.txt" and select the Export File of 'hse_lbl.txt' or 'mem_lbl.txt'.

Special Window Fields – Labels and Merging

Data Selection for Labels

The scrolling window includes a list of all the categories available for generating lists of names. Select a category by clicking on the selection and set the criteria in the bottom half of the form.

Example:

- List of member birthdays this month
- List of members not attending church in the last 3 months

Label Type

The **Label Type** selection controls the format of the labels that will be generated. Match the 'Label Type' with the labels to print.

Use Upper Case

When set to "Yes, ***Revelations*** will create a list of labels with all names, addresses, etc. raised to capital letters. This is the method preferred by the Post Office.

Output Method

Select from Screen, Printer, and Export File as output destinations.

When Export File is selected, other related fields are displayed. The name and location of this file is displayed in the field 'Data File for Labels'. This file is used to populate a word processing document through use of the **Direct Link** button. When 'Export File' is selected the 'Print' button on the left corner changes its name to 'Export File'. Press this button to build the export file after setting the selection options. A message will appear when the file has been built.

Replace/Append Data

The **Replace/Append Data** field is only displayed when an **Output Method** of Export File is selected. This field provides the option to "append the list of member names to an existing list of names or create a "new export file by replacing all the data in an existing file.

Example: To generate a list of birthdays and anniversaries for the next month, select "Birthday Labels" with the setting "Replace Data in File". Click **Export File** to generate the file of member birthdays. To add anniversaries to this list, select "Anniversary Labels" with the setting "Append Data to File". Click **Export File** to append this list of church members to the previous list of members with birthdays. Use the **Direct Link** button to use this combined list in a word processing document.

Export File Type

The type of Export File is specified here. Most word processors use a Comma-Delimited file format (COMMAFILE). If any problems occur using this type of file type, try choosing one of the following alternatives:

TEXTFILE	Ascii text
TABFILE	Tab-delimited format

Data File for Labels

This is the name of the export file that will be created to hold the church member information. When the **Output Method** of 'Export File' is selected and the **Export File** button is pressed, ***Revelations*** places the information into the filename listed here.

When the **Direct Link** button is pressed, the word processor is instructed to read the file shown in the **Data File for Labels** and uses the information to link to the requested form.

The export file is regenerated each time the **Export File** button is pressed.

Would you like to add Secondary Households

To work, the button 'One Label/Household' must be set to 'Yes'. Any member who is assigned to a secondary household will then have a label printed to both the main household and secondary households.

Special Buttons – Labels and Merging

Print

The Print button is used to print the selected labels or name tags. The format and destination of the selected labels or name tags is controlled by the current settings of the **Label Type** or **Output Method** fields.

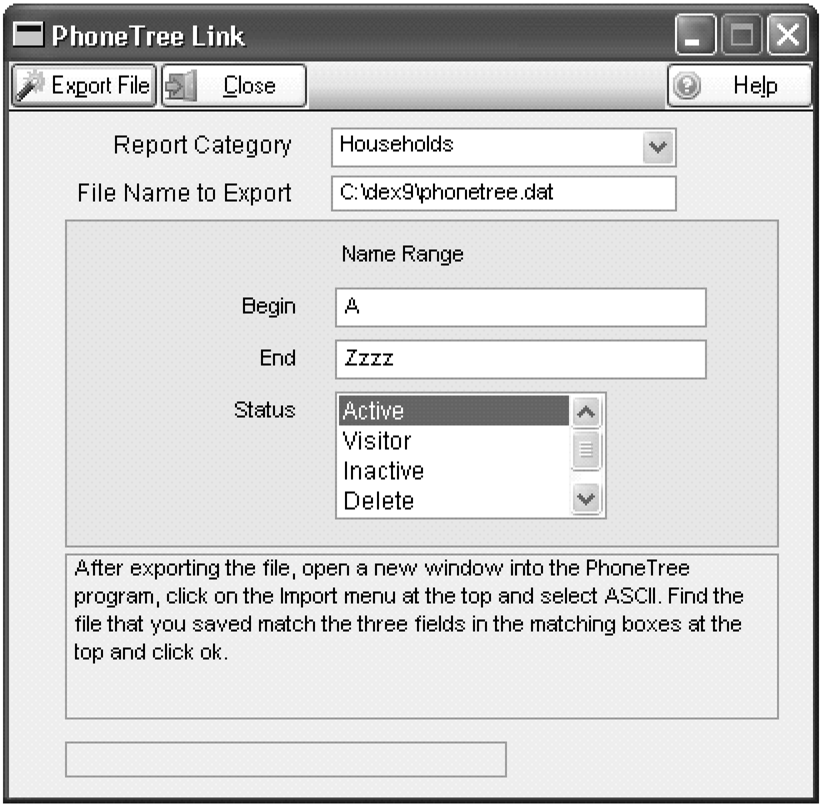
When the Output Method is set to Export, the name of the button changes to **Export File.** Use this button to prepare the Export file before using the **Direct Link** button. Wait for a "file complete" message to appear before pressing the **Direct Link** button. The export file is regenerated each time the **Export File** button is pressed. Information is added to the export file if the field **Replace/Append Data** is set to "Append Data to File".

Direct Link

The **Direct Link** button is used to link the export file to Microsoft Word, WordPerfect or Microsoft Works. When this button is pressed, Revelations accesses a pre-formatted file with an extension of .doc, .wps, or .wpd. These files are located in the 'Church' folder.

Before using the **Direct Link** button, set the output method to **Export File** and press the **Export File** button. ***Revelations*** will create a file that is used to link with your word processor.

Phone Tree



The Phone Tree Link allows data within the Revelations database to be exported to a text file that can be imported by Phone Tree. The bottom portion of the window provides instructions on the use of the form.

Olan Mills

Use this window to prepare a data file for submission to Olan Mills. Olan Mills will use this file for preparing the church directory.

Filling out the Form

Most of the fields are self-explanatory. Once the fields are filled out, press the **Export File** button. Output defaults to the A drive but it can be redirected to other devices. When using the A drive, be sure a blank diskette has been inserted.

Household Status

Multiple status groups can be selected by holding down the Ctrl key and then click on a status. Clicking on a status will toggle it.

Member Status

Works the same as Household Status. A household status of Inactive could be selected but if the member status is set to Active then only the active members in inactive households would be sent to the data file. First the households are selected by status group and then the members in those households are evaluated by status code.

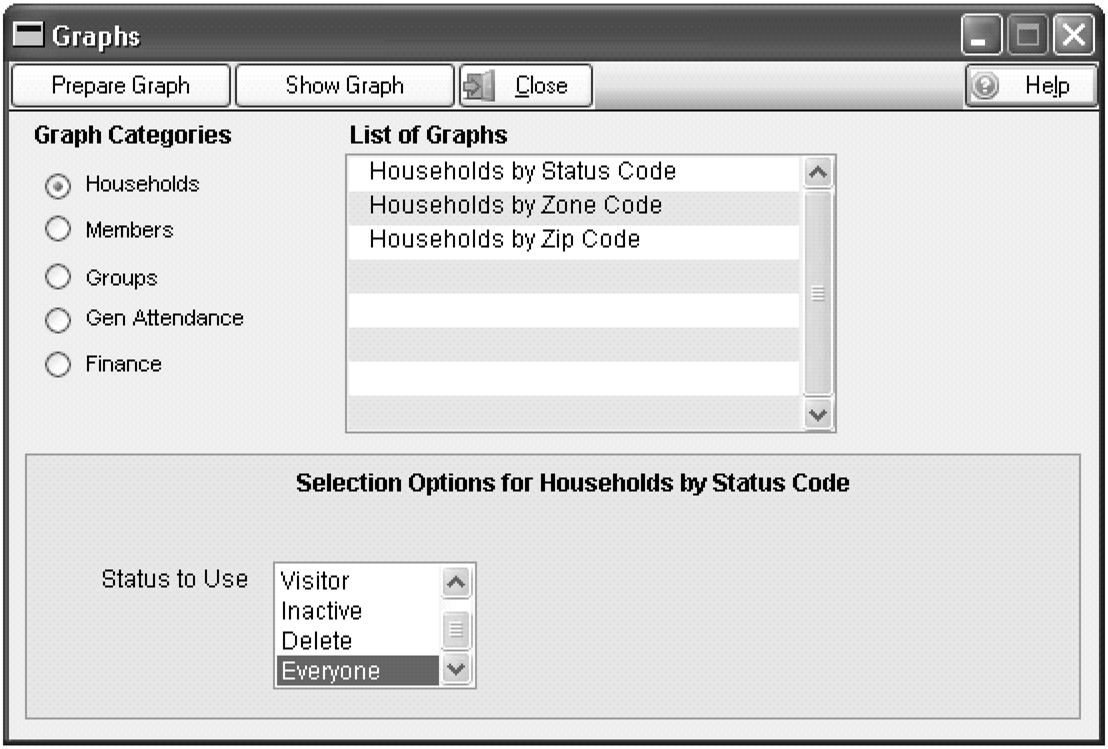
Denotes

Pressing the **Denotes** button opens a window where a footnote can be defined for a status group. For ex: Select the status group ‘Inactive’. Enter an asterisk (‘*’) in the ‘Denote Character’ field. Enter ‘Inactive Household’ in the Associated Footnote. When the church directory is printed an asterisk will appear along any inactive household and a footnote will appear at the bottom of the page explaining that an asterisk indicates ‘inactive’.

Data File Name

Defines where the data is to be sent. Most often it will go to a diskette and the field would contain something like A:\directory.txt. By clicking on the folder icon to the right of this field a pop-up window appears allowing the hardware location and file name to be entered. Using this window helps assure the syntax for this field is correct.

Graphs



Graphs are available to display much of the information collected in ***Revelations***. To view a graph, click on the desired category and select a graph from the scroll window. Set the parameters for the graph and press the **Prepare Graph** button. When complete, the graph will be displayed on the monitor. To recall the graph, press the **Show Graph** button. There are no graphs for the category of Talents.

To select multiple status codes, hold down the control key and then click on as many status codes as you want. To select a range of codes, select the first status code in the range then hold the 'Shift' key down and click on the last status code in the range. All status codes within the range will be selected.

Special Buttons - Graphs

Prepare Graph

Revelations retrieves the data necessary to generate the selected graph. After the statistics have been calculated, a message 'Graph Prepared' will appear at the bottom of the window. Press the button **Show Graph** to display the graph.

Show Graph

Revelations displays the graph just prepared. The statistical data behind the graph is not recalculated when **Show Graph** is selected.

Revelations Graphs Form

Graph Type

There are 4 graph types to choose from: Bar charts, 2 Dimensional(2D) and 3D and Pie Charts (2D) and 3D. The maximum number of data points that can be graphed is 53. Beyond that the graphs become unreadable.

Bar Charts

When several columns are graphed the legend bar may not contain all the columns due to insufficient space. As the number of data points increases the number of legends diminishes. First to every other legend then to every third, etc..

Pie Charts

Slices of zero value are not shown on a pie chart.

Changing the Title

The title of the graph can be changed by editing the Title field

Printing Graphs

Select the Print option under File to print a graph. The graph can be printed in either Portrait or Landscape and the graph size can be modified.

Pictorial Directory

A church directory of family pictures can be printed in color using this selection. For best results use pictures with pixel resolutions of 600 dpi or greater. The higher the resolution the better the print quality will be.

Before the directory option can be used it must be installed using the ***Revelations*** installation CD. Select the installation option titled **Install Pictorial Directory**.

Since all of the pictures on the directory will be the same size it is a good practice to load and save pictures that are similar in size. This eliminates severe shrinking and stretching when the program moves the pictures into the directory.

You control the number of pictures that are printed on each row as well as the number of lines of information below each picture.

Buttons on the Pictorial Directory form

Add New

Opens a form called 'Pictorial Add' which allows additional households to be added to the scroll window. All households in the scroll window will be listed in the directory even when they do not have a picture. The scroll window on Pictorial Directory form indicates the availability of a picture for each household.

Delete

To delete a household from the scroll window, select the household and press the **Delete** button.

Build File

Builds a work file from which the picture directory is printed. A message "Text File is Complete will be displayed after the work file is built. Press this button after all households to be on the directory have been selected.

Execute Directory

Once the text work file is built, press this button to perform the final steps in printing the directory. The form titled 'Record Maintenance' will be opened.

Record Maintenance form

Note the title bar on this form. A database is referenced at the end of the form. The first time this form is entered it looks for a database file. If it can't find one it creates a file called 'Picture.db' and copies the data that was built using the **Build File** button on the previous form. Ensuing entries to this form result in the last database being opened and displayed. This display does NOT reflect any changes made from the form ‘Pictorial Directory’. To access changes made from Pictorial Directory, click on ‘New’ and create a new database. Once a database is created, names can only be deleted using the **Record Maintenance** form. To add a name requires a new data base to be created after the Pictorial Directory is modified.

Removing a name from the households, members or even the Pictorial Directory form will not change the database that is stored using the **Record Maintenance** form. New records cannot be added but information can be modified and saved by pressing the **Update** button. Records can be removed by pressing the **Delete** button. To build a completely updated list, click the **Build File** button on the Pictorial Directory form. Then create a new database to read the new list. The new database button will read the file from Revelations and will create a new listing.

Buttons on the Record Maintenance form

File - New

Use to create a new database to store directory information. The contents of the text file created by pressing the **Build File** button on the ‘Pictorial Dictionary’ form is saved in this new database.

File - Open

Opens an existing database.

File - Update

Adds any changes made to the database.

File - Page Setup

Opens a window to define the directory layout

File - Preview

View the directory before committing to printer

File - Print

Prints the directory

Edit - Find

Locate a family in the database

Revelations Picture Directory

This form defines the layout of the picture directory. Define the number of pictures per row, the number of lines of text, the size of the pictures, etc.

Buttons and Fields on the Revelations Picture Directory

Default

Pressing this button selects a set of default parameters for a directory

Printer Setup

Opens a screen for setting printer options

Print Preview

Allows the viewing of the directory before committing it to the printer

Print

Prints the directory

Page Dimensions

Define the number of columns per page and the height of each row in pixels.

Text Dimensions

Define the number of lines below the picture, the height of each line and the font to use

Picture Dimensions

Define the size and location of a picture within the square defined in the Page Dimension above.

Questions & Answers – Picture Directory

Q. When printing the report to the printer some images do not show – Why?

A. This is a known problem that occurs with many printers. The problem can be resolved by doing the following;

- Preview the report.
- From the Preview screen save the report to a file.
- Press the **Load Saved Report** button and select the report just saved.
- Report should now print without any problems.

- You may lose your printer settings when you load the saved report. If this happens, reset the setting the way they were prior to entering the program.

Q. Changing the printer properties inside the **Preview** window does not affect the program.

A. The **Preview** window cannot be referenced by the program so all printer changes will be lost after closing the **Preview** window

Q. Only half the picture is showing for each person when I print or preview

A. The page setup window shows the dimension of the picture and the box that it must fit in. Anything outside this box will be cut off.

Q. How do I change the information that is printed below an image.

A. Go to the Households name and select the line you wish to change and type in the changes. Any changes are automatically saved.

Q. I chose to update the window but deleted households are still showing and names that have changed in Revelations did not change in here.

A. The update process only adds new households. It does not change or delete any existing records. This must be done manually or create a new database bringing in the file exactly as it is in ***Revelations***.

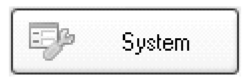
Modified Reports

This entry only appears when the Report Writer option has been purchased and after one or more reports have been modified or added. Rather than running the reports from within the Report Writer they can be run from here.

Pressing this button opens a small pop-up window from which a new or modified report can be selected. Some modified reports were created by Revelations using temporary files (ie; they exist only through the duration of the report creation after which they are deleted). Consequently, the temporary file doesn't exist when running from this option and the report will print with zero records. Modified reports must be run from the Revelations window that created the report. For more information on the Report Writer proceed to the Appendix section.

System

System Setup & Maintenance



Owner Setup

System Preferences

System Utilities

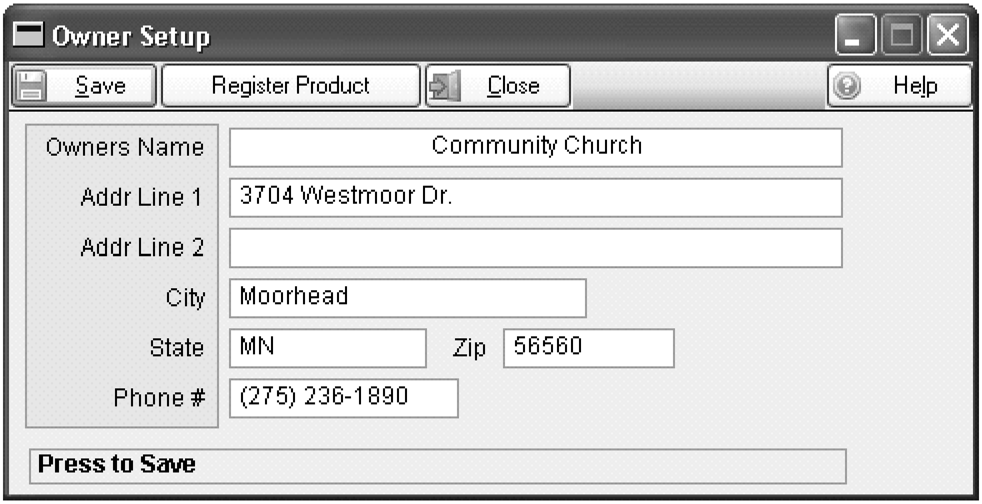
Year End Processing

Security

Backup - Restore

System

Owner Setup



The **System Form (Owner Setup)** window is used to record information regarding your church. This information is used as headings on reports and is used in determining the registration code when registering the ***Revelations*** product. The owners name and address appears on printed reports.

Special Window Fields – Owner Setup

Owners Name

Name of your church. This name must match exactly as it appears on the registration letter received with the product. If the name is listed incorrectly, call 1-800-596-4266 to have it corrected.

Phone #

The main phone number of your church.

Special Buttons – Owner Setup

Save

Save the changes to the **Owner Setup** information.

Registration

The **Register Product** button is used to setup and access the product registration information for your copy of the ***Revelations*** system. The product registration information recorded here controls your license agreement to the ***Revelations*** product. If the message “Only the primary database is registered” appears, you are in the demonstration part of the system. Go to ‘File – Change Users’ and a Welcome window will appear. The default User Name is ‘Master’ and the default password is ‘Reveal’. Change the **System Type** from ‘Demo’ to ‘Product’ to switch from the Demonstration system to the Product system.

Special Buttons – Registration

Registration

Revelations uses a set of registration ‘keys’ to validate the copy of the system. The registration key is included in the ‘Thank You Letter’ you received with your ***Revelations*** package. If there are any problems, please call ***Revelations*** at (800) 596-4266 for assistance. If you purchased ***Revelations*** from a store, a Serial number will be listed on a yellow card. Call ***Revelations*** to obtain the rest of the registration keys.

Special Window Fields – Registration

Product Type

Select the product type of **Product** or **Subscription**.

Serial No.

The serial number is included with the Registration letter or on the yellow card included in your package.

Registration Date

Enter the date that appears in the Registration letter.

Single/Multiple Data Base

Set this switch to **Multiple Database** to maintain information for more than one church.

Single/Multiple Users

Set this switch to **Multi Users** to register Revelations as a local area network system. Click on the field to toggle between single and multi-user.

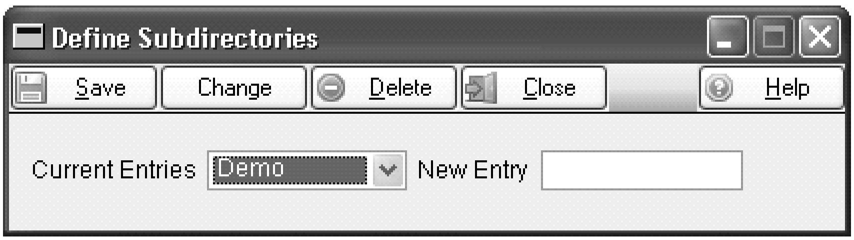
Registration Code

The **Registration Code** is included in the 'Thank You' letter received with your ***Revelations*** product. If you cannot find the registration code or need assistance, please call (800) 596-4266.

Special Buttons - Registration

Add Data Base

To track and maintain information for more than one church, click **Add Database**. A form opens where new database names can be defined. The name of the new database will appear in the drop-down box of the **Welcome** window. See below for instructions on filling out this screen.

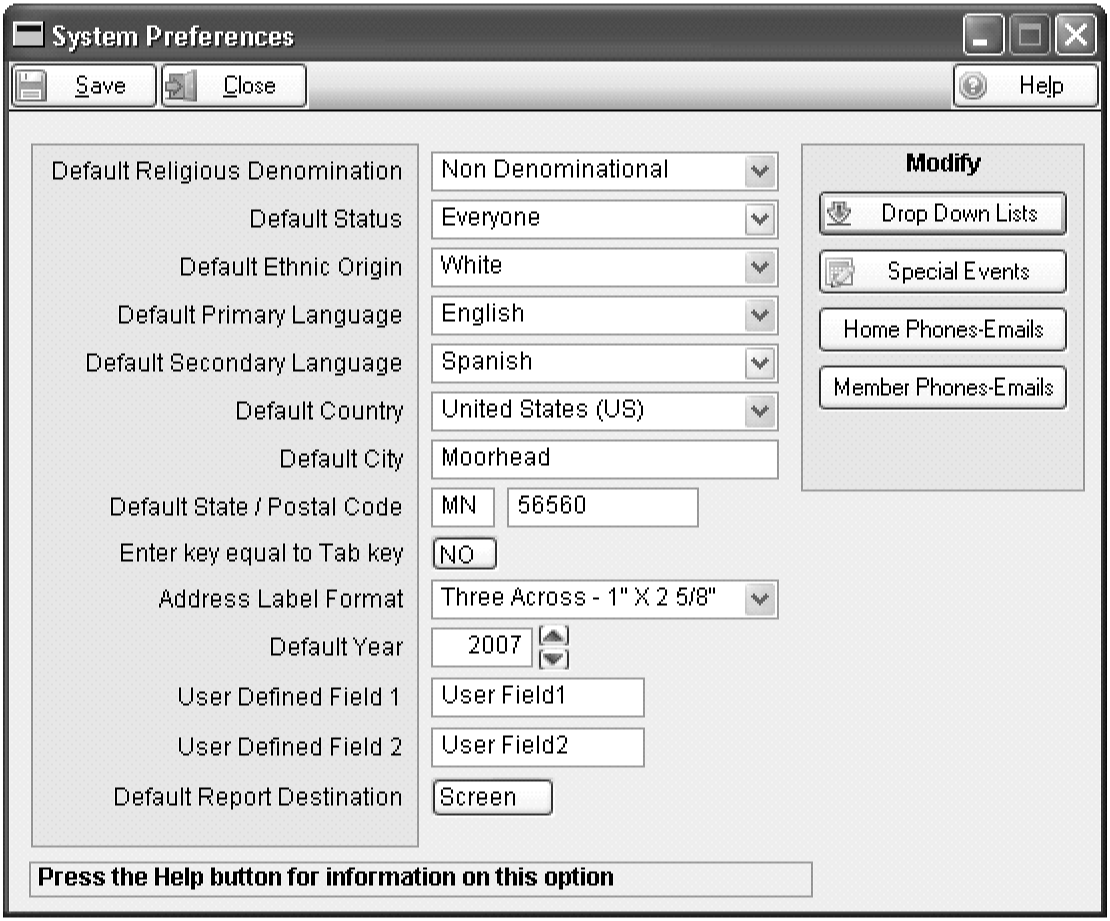


Use this form to define additional churches that you want to keep records for. The 'Current Entries' drop down contains a list of the directories defined. To delete an entry (Demo and Product cannot be deleted), select an entry from the drop down and press the **Delete** button. The primary church should be defined under the **Product** directory.

New Entry

Enter up to 8 characters defining the name of the church. Press the **Save** button. That's all there is to it. The next time the Welcome window is brought up the new entries will be available in the **System Type** drop down list. User names and passwords can be defined separately for each church.

System Preferences



The **System Preferences** window is used to specify defaults and preferences that are used throughout the rest of the ***Revelations*** system. By specifying the most common responses to questions asked throughout the system, the data entry process will proceed with more ease.

Window Fields – System Preferences

Default religious denomination

Select the religious denomination of your church. If the desired denomination does not appear, click the **Drop Down Lists** button at the right of this window and use the Drop Down Preferences window to add new entries to the list. This window allow entries to be modified or new ones to be added.

Default Status

Whenever a window that contains a status selection is opened, it displays the households or members with the default status entered here.

Default Ethnic Type

Select the predominant ethnic type for members of your church. This entry will be used as the default ethnic type.

Default Primary Language

Select the primary language of your church members.

Default Secondary Language

Select the secondary or alternate language spoken by the majority of your church members. If your church predominantly speaks a single language, just select the same language here as specified for **Default Primary** language.

Default City

Enter the city that most households will be living in

Default State

Enter the state that most households will be living in

Default Postal Code

Enter the postal code that most households will be living in

Default Country

Select the country that most households will be living in

Enter key equal to Tab key

The Tab key is typically used to move between data fields when using programs that run under Microsoft Windows. To use the ‘Enter’ key to move from field to field, select “Yes” to this question.

When this option is set to **Yes**, the combination of <Shift>+<Enter> will activate a button.

Address Label Format

Select the most common format for address labels used by your church. The selection here will define the default label format selected throughout the system

Default Year

Choose the current year. This field determines which envelope definition file is used by the financial system, including financial reports. Be careful to have this field set to the correct year when running financial reports or entering/modifying financial information.

Note: On multi-user systems all users that are on the system will be working in the same fiscal year. Therefore, if you change the fiscal year you are also changing it for everyone else that is connected.

User Defined - Field 1

This ten character field is provided for use on the **Household** form. Give this field a descriptive name depending on the type of information it will contain.

User Defined - Field 2

This ten character field is provided for use on the **Household** form. Give this a descriptive name depending on the type of information it will contain.

Special Buttons – System Preferences

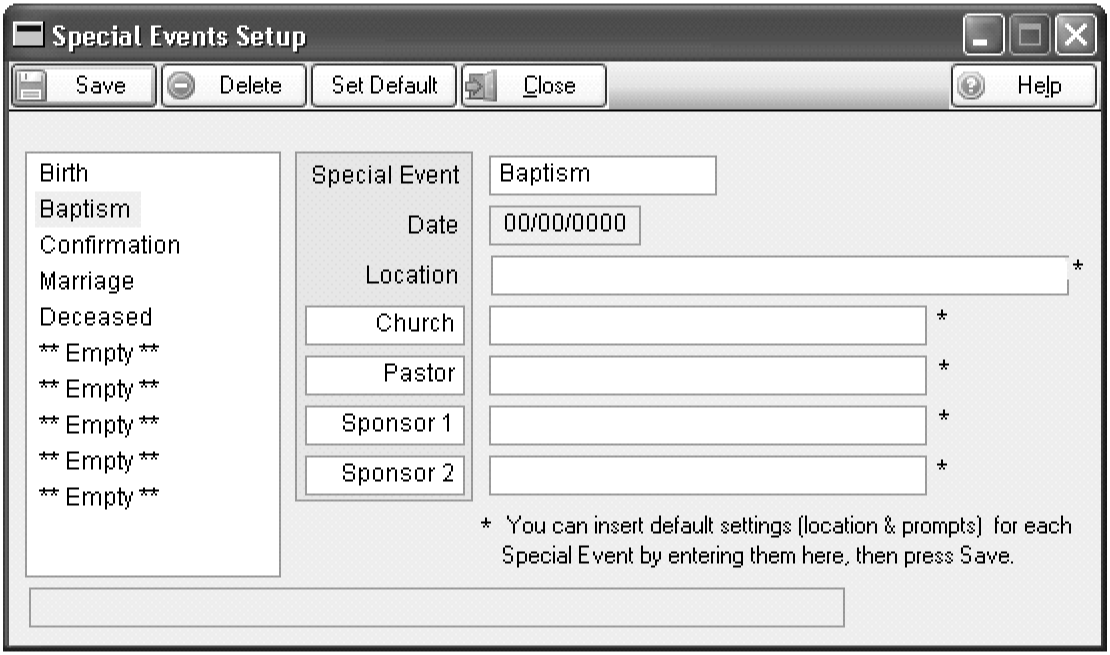
Drop Down Lists

Opens the Drop Down Preferences window. Use this window to customize the information available in drop-down lists throughout the system.

Special Events

Opens the Special Events Setup window. Use this window to customize the special events your church wants to track.

Special Events Setup



The **Special Events Setup** window is used to customize the information your church retains for special events such as birth, baptism, etc.. ***Revelations*** allows for the tracking of 10 special events. Five suggested events have been entered and while they can be redefined, ***Revelations*** does assume the basic name categories are defined as is. All special events have three fixed fields – Name, date, and location. The remaining four fields can be modified to meet special reporting needs.

Select an event name from the list to modify, or select ** Empty ** to add a new special event.

Default values can be set for each individual event, such as location or the four prompt fields. This information can be inserted when entering the special event record for a member.

Special Window Fields – Special Events Setup

Name

Special Event name

Date

Date on which the special event occurred. These dates must be syntactically correct (mmddyyyy) as they are used in date arithmetic. While a partial date can be entered, it will not qualify for use in reports requiring date calculations when it does not include month, day and year.

Location

Location where the special event occurred.

Last 4 fields

All of the fields below **Location** are custom defined. To change existing fields or add a new field, check the checkbox and press the **Modify Event** button. Highlight the field to be changed and type in the name of the new field.

Special Buttons – Special Events Setup

Save

Saves the setup information for the selected special event.

Delete

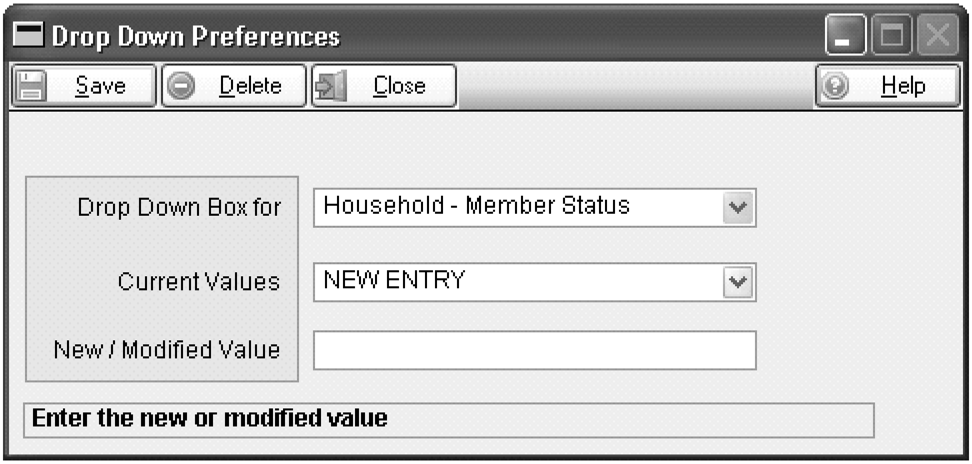
After selecting a special event, use the **Delete** button to remove the event from the list of special events. A question will appear asking if any information entered for members of this event should be removed. We recommend a response of ‘Yes’.

It is strongly recommend that the first 5 events are not deleted nor their intention changed. It is OK to alter the definitions of the last 4 fields.

Set Default

The **Set Default** button is used to define which Special Event appears when the special event window is first opened. To set the default, select the desired event on the left and click the **Set Default** button.

Drop Down Preferences



The **Drop Down Preferences** window allows you to change the selections available in a number of the ***Revelations*** drop-down lists. Pick the drop-down list to be changed and then modify an entry or add a new entry to the list. A drop down list can contain up to 30 different entries. Any window using these fields will immediately reflect these changes. **IMPORTANT:** Once an entry is added it cannot be deleted. It can, however, be modified. The exception to this is the **Household – Member Status**, **Relationship**, **Visit By**, and **Visit Type**. Any entry from these drop downs can be removed.

Special Window Fields – Drop Down Preferences

Drop Down Box for

Select the drop-down list to change.

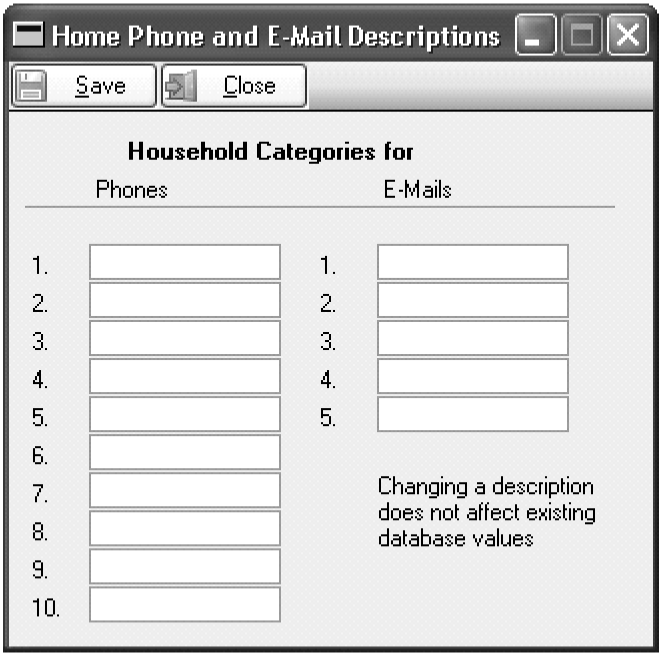
Current Values

Select **NEW ENTRY**, to add a new entry to the selected drop-down list. To modify an existing drop-down entry, select the entry to be modified. Type the new value into the **New/Modified Value** data field and press the **Save** button. A drop-down list may contain up to 30 entries.

New / Modified Value

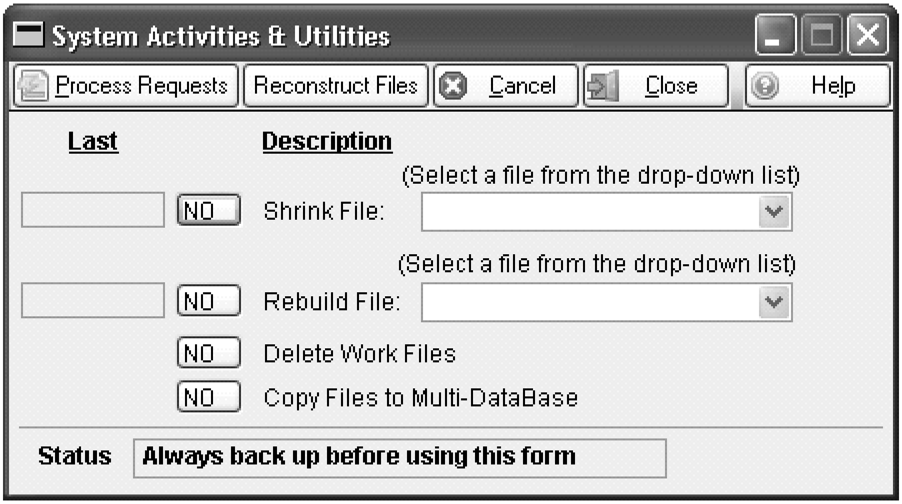
After selecting the **Current Value** or **NEW ENTRY**, type the new value into this field.

Home Phones – Emails



Use this window to define the various categories of phone numbers and Email addresses you want to track. This window functions the same way for members. The system comes with three definitions but they can easily be changed. Simply type in the category name and press the **Save** button when complete. If an entry is removed from this window (such as entry number 4) and households have phone numbers assigned to entry number 4 then they will still have entries assigned to number 4. They just won't have a name assigned to that entry position.

System Utilities



The **System Activities & Utilities** window is used to process procedures that would typically be done at year-end or your computer had crashed for some reason. Be sure to perform a backup before processing any of these requests as most requests result in permanent changes to the database.

Shrinking Files

Shrinking files is the process of rebuilding a file's index and releasing unused disk space back to the operating system. Disk processing also speeds up as a result of shrinking files. We always recommend the shrinking of financial files after they have been consolidated because a lot of unused disk space exists where detail contributions used to reside. Shrinking also improves performance of applying attendance in the General Attendance section because it is such a dynamic area of change.

Rebuild Files

Use the rebuild option when file errors are being experienced. The rebuild process reads every record, verifies it and rebuilds the file index.

Delete Work Files

Revelations uses work files when preparing many of the reports. If, for some reason, they become corrupt the reports cannot be built. This option removes all work files. It will not remove any of the data files.

Copy File to Multi-Database

This feature is for churches administrating to more than one church. When new versions are installed and the registration keys change, use this option to update the registration information in all folders.

Special Buttons – System Utilities

Process Requests

Click the **Process Requests** button, to process any action marked with a **Yes**.

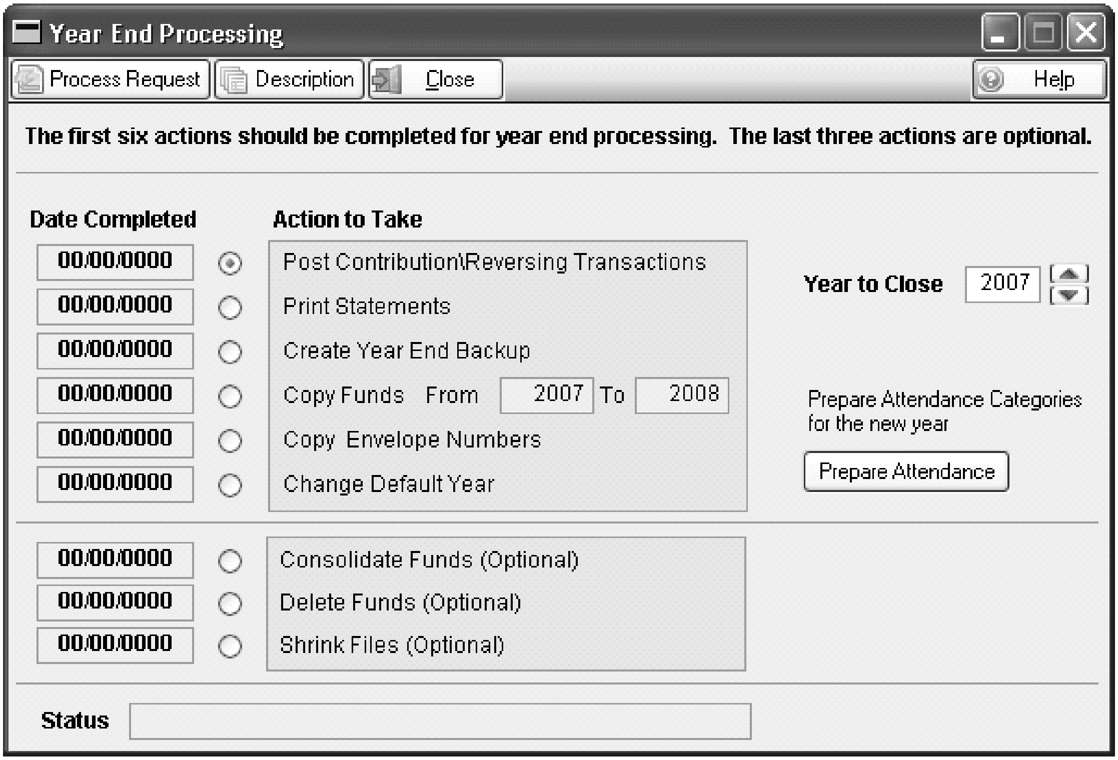
Reconstruct Files

Computers can crash. Most frequently it is due to a loss or drop of electrical power. When this happens it is possible some of the files in Revelations will become corrupted. Your action should be to perform a backup onto diskettes using the ***Revelations*** backup window. DO NOT backup over previous ***Revelations*** backup disks as they may be needed to restore your database in the event the reconstruct feature doesn't work. Next, call ***Revelations*** support team at 218-236-1899 for assistance. The two buttons, **View File** and **Custom Report Setup** are password protected and will only work with the assistance of our support team.

Cancel

Resets all the Action switches to **NO**

Year End Processing



The Year End Processing function guides you through the correct sequence of events for setting up the new year. Through this screen you can copy all funds, create a year-end backup, print statements, etc. Previous years information are available at any time by changing the year to work with on the System Preferences form.

All functions are setup as radio buttons, so just point and click to mark them as a request to be processed. Only one request can be performed at a time.

There is a line running horizontally through the middle of the form. Items above the line are required actions while items below the line are optional.

Multi-Year Funds

Multi-year funds are handled differently then other funds when using the **Copy Funds** option. Annual funds simply have a new record created with the new year placed in front of it. No pledge information is brought forward nor are any transactions. Multi-year funds when copied are not really copied, rather the year of the fund is simply changed to the new year. Consequently, all the pledge information and contribution data remain – which is what is wanted for multi-year funds. For this reason it is a good idea to not transfer multi-year funds until after year-end statements have been run.

When looking back to prior years, multi-year funds can't be found because they were brought forward. Multi-year funds will remain in the year in which they expired.

Fiscal Year different than Calendar Year

Many churches have a fiscal year that does not coincide with the calendar year. This poses special problems because the contribution statements people receive are always based on a calendar year. Take an example where the fiscal year is July through June and envelope numbers change yearly. When January arrives the year end processing routines should not be run since your fiscal year hasn't changed nor should the 'Default Year' in the System Preferences window be incremented. When June arrives you will want to use the Year End processing screen to create a new envelope master list for the new year. Manually create the new funds. Do not use the 'Copy Funds' option as Revelations will view the funds as Multi-year funds since they span two calendar years. Finally, change the 'Default Year' in the System Preferences window to reflect the new fiscal year.

Special Window Fields – Year End Processing

Year to Close

This will reflect the current year. Be sure to change it to the year you wish to close. An error message will appear if there are any contribution batches or reversing entry batches that still exist. These batches must either be posted or deleted before the year can be changed.

Post Contribution Transactions

This will post any outstanding contribution batches.

Print Statements

This opens the **Contribution Statements** window

Create Year End Backup

This will start the backup process for the end of the year. A year end backup is normally done at the end of January after statements are sent out.

Copy Funds

This will take the funds used this year and create copies of them with the same name but a new year and a 0 (zero) balance. NOTE: When a multi-year fund is detected its ending year will be compared with the "copy to" year on the form. If it is less than the "copy to" year it will not be transferred otherwise a message will appear saying that it should not be transferred until after year end contribution statements have been run. The reason being is multi-year funds are transferred and not copied allowing the contribution history to be retained. Transferring a fund would remove it from the current year. This copy function can be run as often as you want. Fund duplicates will NOT be created using this process.

Copy Envelope Numbers

All envelope numbers from the current year will be copied to the next year.

Change Default Year

This will change the default year on the **System Preferences** form and all other forms where it is displayed and used. All existing contribution batches and reversing entry batches must be posted or deleted before this option can be performed. Unwanted batch files can be removed using the **Finance Utility** window, which is found under the ‘Finance’ menu button.

Consolidate Funds

After printing statements and closing out the year, you may want to consolidate the funds to improve efficiency and reduce disk space requirements. All contributions for each assigned envelope are consolidated into a one-line entry with a date of 12/31 of that year. Ex: Someone contributes 51 times to the ‘Sunday Service’ fund. By consolidating, the 51 contributions will be added together creating a 1-line entry dated 12/31. The 51 contributions will be deleted resulting in the loss of detailed giving. Some churches only consolidate funds after they are two years old.

Delete Funds

If there is no longer any need to view the history for the previous year, delete the fund and all contribution records for it. We recommend that churches use the **Consolidate Funds** feature instead of this one.

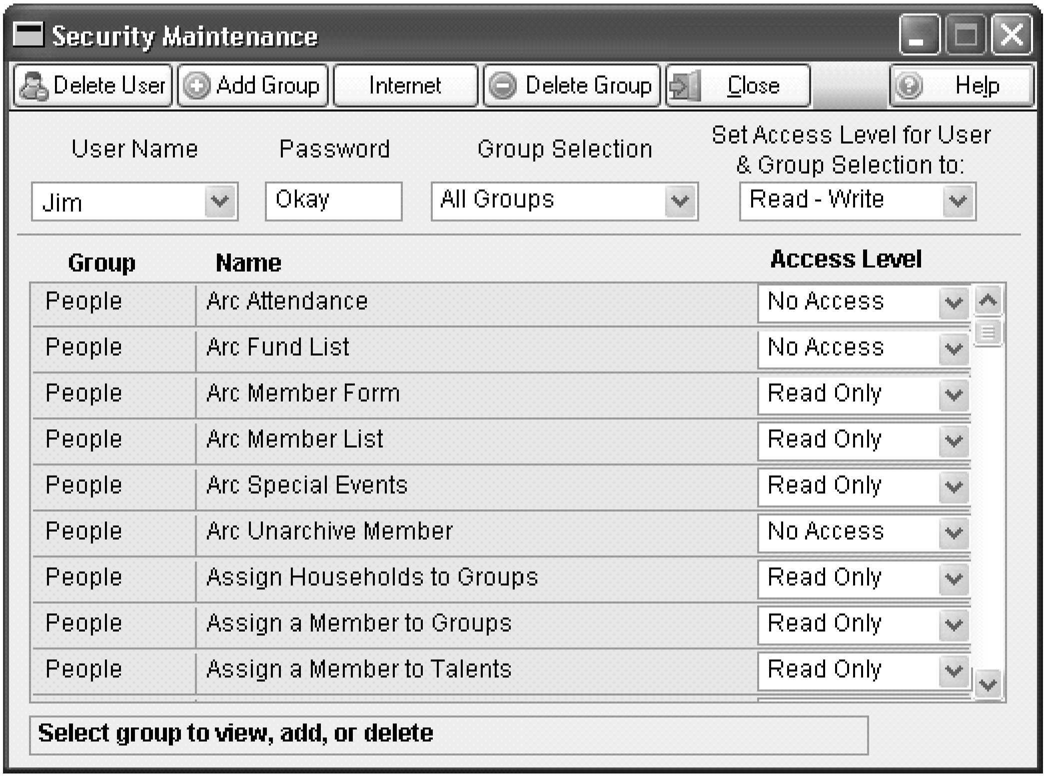
Shrink Files

To reclaim disk space, shrink the files after Consolidating or Deleting of Funds. This is an important step and can be done every 6 months to improve operating efficiency.

Prepare Attendance

Pressing this button will create two new General Attendance Categories for the following year – Communion – yyyy and Sunday Worship – yyyy. The year will be one greater than the year being closed. For ex: when closing the year 2007, pressing this button will create general attendance categories Communion – 2008 and Sunday Worship 2008. The 52 or 53 Sunday events will also be created for Sunday Worship. Pressing this button twice will not create duplicate entries.

Security



The **Security Maintenance** window is used to add and maintain user access to ***Revelations.*** Each user can be individually configured to access any window in the system. This feature allows maximum confidentiality for the church data. The scroll window displays all the windows a user has access to and the type of access. Since the 'Master' user always has access to everything, the window is left blank.

Window access can be defined as read-write, no access, or read only.

Special Window Fields - Security

User Name

The default user, Master, automatically appears. The password for Master should be changed to something other than default value of 'Reveal'.

To enter a different user name, type the name in this field. The field is case sensitive. Then type in a password for the user. The password can be changed as often as you want.

Note: Simply adding the name and password for a new user will not give them access to windows within Revelations. Use the **Group Selection** drop down list to define the forms to which access is given.

Password

Enter the new password for the user. This field is case sensitive.

Group Selection

Group Selection is divided into the same main groups as seen on the Revelations desktop. To grant access to a specific group of windows, select the group and click the **Add Group** button. The current user can now access the specified groups of windows. To give access to the entire system, select **All Groups** and press the **Add Group** button. Further restrictions can be made on a window by window bases by pressing the **Access Level** switch in the scroll window.

To restrict access to one or more windows within a selected group use the **Access Level** switch in the scroll window. The default access is ‘Read-Write’. Access can be changed to ‘No Access’ or to ‘Read Only’ by clicking on the button.

To remove access to a specific group of windows for the current user, select the group and click the **Delete Group** button.

Name

The name of each window is displayed in the “name field”

Access Level

There are 3 choices to choose from.

Read-Write grants access to the window.

Read Only gives only read access.

No Access doesn’t allow the window to be opened.

Special Buttons - Security

Delete User

After selecting one of the system users, click **Delete User** to remove a user from the ***Revelations*** system. ***Revelations*** does not let the master user be deleted. Consequently, it is a good practice to change the password for **Master** to something other than **Reveal**.

User Name Master

Password Reveal (default value)

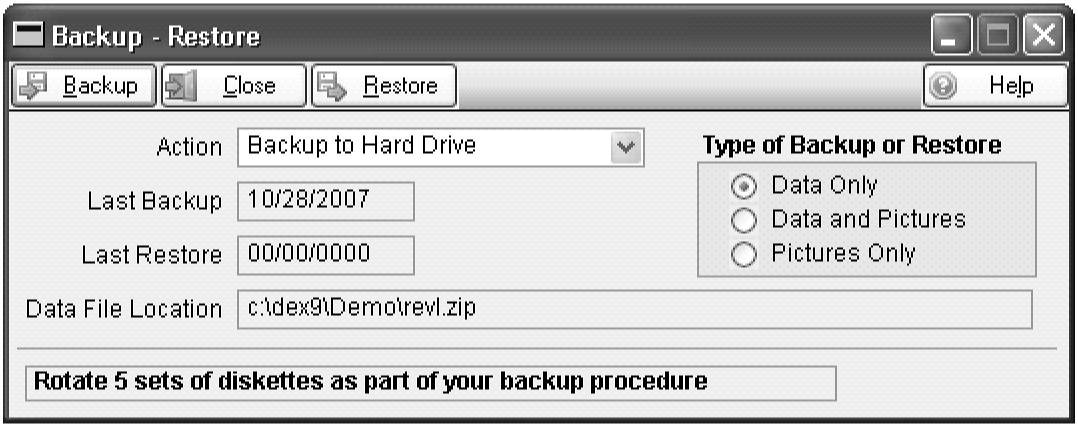
Add Group

Using the **Group Selection** field, select the group you want to give the user access to. Next, click the **Add Group** button to add the selected group(s) of forms to the user. Further restrictions can be made within a group by using the **Access Level** switch shown in the scroll window

Delete Group

To remove a “group of windows from the list of accessible windows for a user, select the window group from the **Group Selection** drop-down list and click the **Delete Group** button.

Backup - Restore



Revelations provides a backup and restore facility to aid in the process of backing up the church database. After installing ***Revelations***, define a regular backup schedule to ensure that a second copy of the database is always available. Power problems, storms, or bumping a computer can create a severe system problem. Backup is many times the **ONLY** way for the data to be recovered.

We recommend that 5 sets of disks be rotated to store data backups. When all 5 sets are used, cycle back and use the oldest set of backup disks to store the next backup. Dating the backups (ex: 2/12) each time helps identify the most recent set.

The Revelations backup procedure compresses the data into a zip format. This greatly reduces the space required on the backup media.

Types of Backup

There are 4 choices when performing a backup or restore. The first 3 choices are fixed and cannot be altered. They are to the A drive, the B drive and the hard drive. The hard drive location is the 'Data' folder of ***Revelations***. The name of the file is 'Revl.zip'. The fourth option is 'Backup to Specific Location'. When the 'Backup' button is pressed a window will open letting you select the device and the name of the backup file.

Special Window Fields – Backup/Restore

Date of last Backup

The **Date of last Backup** field contains the last time the ***Revelations*** database was backed up. When restoring the database, always use the most recent backup (created on the Last Date of

Backup). Note: Backing up to the hard drive prior to posting is fast and assures you confidence in being able to recover from any hardware problems during posting.

Action

Click on the **Action** field to select the Backup or Restore process.

Date of last Restore

The **Date of last Restore** field contains the date the system was last restored.

Special Buttons – Backup/Restore

Backup

After selecting the desired backup action**,** click the **Backup** button to initiate the backup process. The system will automatically compress and copy the database to the disk or diskette specified.

Restore

After selecting the desired restore action, click the **Restore** button to restore the database from a previously created backup.

Reference

Administrative Assistance

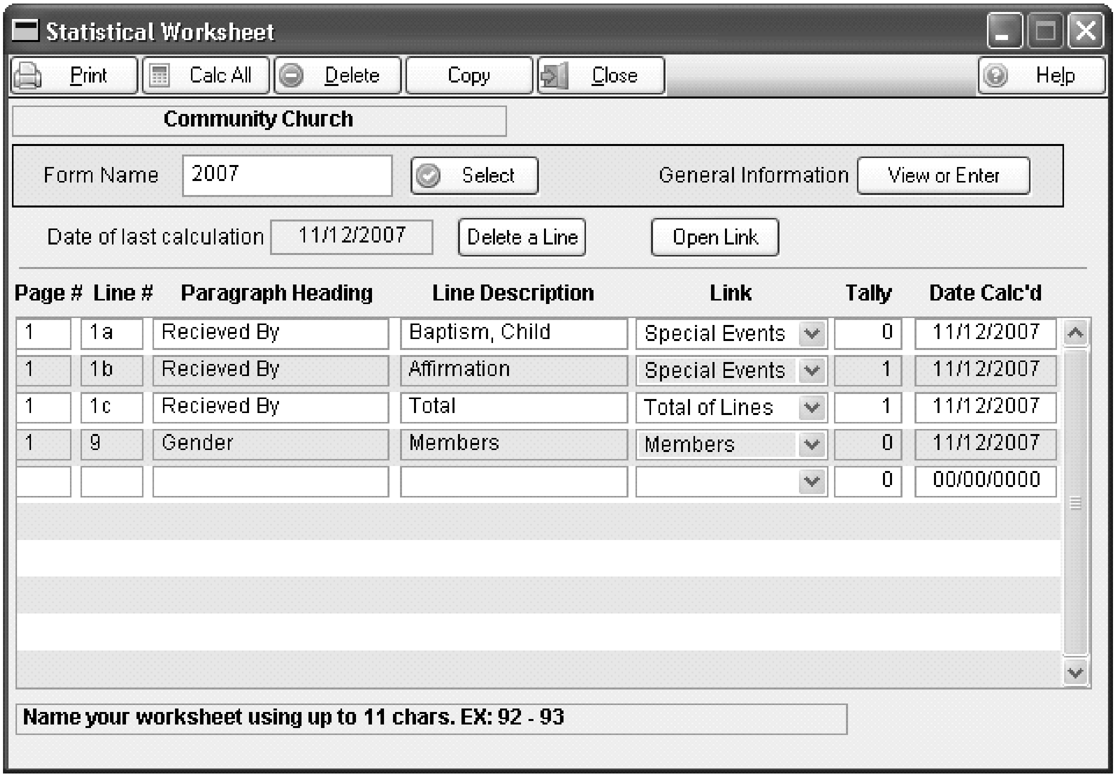
Statistical Worksheet

About Revelations

Desktop Maintenance

Reference

Statistical Worksheet



Many churches are asked to prepare quarterly or annual reports that reflect the progress they are making in growing their congregation. The Statistical Worksheet can be used to obtain statistics on people participating in the various activities and programs of the church. An unlimited number of worksheets may be defined. Existing worksheets may also be copied, making the process of creating a worksheet all the more efficient.

Revelations worksheets are designed to produce information in a page number/ line number format. The page and line numbers can be filled in to match the management report. The paragraph headings and line descriptions further describe the information being reported on the statistical worksheet. Once prepared, the worksheet can be printed out and used to prepare the formal report.

To use an existing worksheet, press the **Select** button. To create a new worksheet, enter a unique form name.

Each worksheet must have a unique form name (up to 11alpha-numeric characters). A form consists of two sections:

1) A general information section (press View or Enter button). The general information section of the report contains text information.
2) A detail section. The detail information section is for tallying records and calculating church statistics. New lines are always added at the bottom using the empty line provided. If a Page # - Line # is entered that belongs farther up the form, the line will be properly sorted when the worksheet is updated.

Detail Information

There is no limit to the amount of detail records that can be created. Every detail line must have the page, line number, and link fields filled out before it is saved. If a duplicate page and line number is entered, the line will be cleared and not saved. Lines that are entered out of page and number sequence will be sorted correctly after control passes to a new line.

To remove a line that is no longer needed, position the cursor anywhere on the line and press the **Delete** button.

Special Window Fields – Statistical Worksheet

Form Name

Name of the selected worksheet. To create a new worksheet, type a new, unique name in the **Form Name** field.

General Information

Click the **View or Enter** button to view or edit the textual information that is printed as part of the current worksheet.

Last date any calculations were made

The date shown in this field is the last date on which any calculations were made for the selected worksheet. Click the **Calc All** button to recalculate any one of the individual statistical line items.

Page# - Line#

The page and line numbers are used to match worksheet results to pre-printed forms (typically used to report quarterly or annual statistical information for the church).

Paragraph Heading

Description of the paragraph or main topic associated with the data that will be reported. Examples would be: Membership, Pledges, etc.

Line Description

The line description is a more specific description of the data that is being reported. An example would be: Active Members, Active Youth (16 & under), etc.

Link

The **Link** field is used to specify which information to extract from the ***Revelations*** database and use to calculate the statistics needed for the report. You are able to "link to all the information recorded by the system (membership, households, pledges, contributions, groups, etc.)

Tally

The **Tally** field displays the most recently calculated value for each line in the statistical worksheet. To update all the statistics, click the **Calc All** button.

Date Calc'd

Date Calc'd is the most recent date of calculation for each individual field on the statistical worksheet.

Special Buttons – Statistical Worksheet

Calc All

Press the **Calc All** button, to recalculate all of the statistics defined for the current worksheet. Revelations updates the worksheet and the **Date Calc'd** column.

Delete

Click the **Delete** button to delete an entire worksheet form from the system. To delete a specific line item in the scroll window, select the line in the scroll window to delete and press the **Delete** button.

Copy

Makes a copy of an existing form. Select a form to copy and click the **Copy** button. To use the newly created worksheet copy, click the **Select** button and pick the name of the new worksheet.

Select

To load an existing worksheet, click the **Select** button. The system displays a small window from which to choose an existing worksheet.

View or Enter

The **View or Enter** button opens the General Information section of the current worksheet. Enter any textual information to include with the report. This information is printed on the final worksheet as a textual summary of the worksheet information.

Open Link

When a Pg and Ln# entry on the worksheet is created specify a "Link" (in the Link column). By specifying a link you are indicating the type of data to work with in the ***Revelations*** database. After selecting the link, click the **Open Link** button to enter parameters and calculate the formula for generating the statistical information.

General Information for Worksheet

The **General Information for Worksheet** window is used to view and edit the textual information that is to print with each statistical worksheet. Enter the text to include as part of the current worksheet and click the **Save** button. The General Information can be modified as often as needed prior to printing the final statistical report.

Special Window Fields – General Information

Date and Time of Last Update

The **Date and Time of Last Update** field is updated each time the **Save** button is clicked.

Copy Statistics

The **Copy Form** window is used to make a copy of an existing statistical worksheet. Select the worksheet to copy and press the **Copy** button. Type the name of the new statistical worksheet in the **New Form** field. Click **Copy** to complete the request.

Special Window Buttons – General Information

Copy Form

Name of the statistical worksheet that will be copied.

New Form

New name of the copied worksheet.

Household Statistics

The **Household Statistics** window defines the detailed statistical information that can be generated for households. Select the desired household **s**tatus and click the **Calc** button to calculate the total number of households.

Special Window Fields – Household Statistics

Household Status

Select the household status group to tally. Only one status group can be selected at a time.

Tally by Status Date

This option works off the status date contained on each member form. Leave this field blank to tally all households having the indicated status.

Special Buttons – Household Statistics

Calc

Perform the calculation based on the parameters entered.

Member Statistics

The **Member Statistics** window defines the detailed statistical information that can be generated for members. Several parameters are available for constructing the desired calculation. This criteria includes:

- One or more status groups selected using the Control key
- Member relationship (i.e. Son, Husband, Wife, etc.). Multiple relationships can be selected by using the Control key.
- Age ranges (as of a specified date)

After selecting and specifying the appropriate member criteria, click the **Calc** button to calculate the total number of members that meet the specified criteria.

Special Window Fields – Member Statistics

Member Status

Select one or more member **s**tatus types to be used as criteria for this calculation. To select more than one **s**tatus, press and hold the “Ctrl” key while clicking on each of the status items.

Relationship

Select one or more relationships. To select more than one relationship item, press and hold the “Ctrl” key while clicking on each relationship item.

Age Range as of

Specify a date to calculate the total number of members that fall within a specific age range. Each member will be compared to the specified age range to determine if the member fits within the age range criteria.

Age Range Begin/End

The beginning and ending ages for the specified age range. An example would be to specify beginning and ending ages of 5 and 13 to get the total number of elementary age children.

Last Calculated on

The date for which the last calculation was made.

Group Statistics

The **Group Statistics** window defines the detailed statistical information that can be generated on church groups. Several parameters are available for constructing the desired calculation. This criteria includes:

- Number of events held for a specific group
- Average attendance at group events
- Total number of group members

Select the criteria and press the **Calc** button to perform the calculation.

Special Window Fields – Group Statistics

Members

Select the **Members** checkbox to calculate a “membership total for the selected group.

Events

Select the **Events** checkbox to calculate the “total number of events held for the specified group.

Avg Attendance

Select the **Average Attendance** checkbox to calculate the average attendance at each group event (for the specified group).

Talent Statistics

The **Talent Statistics** window defines the detailed statistical information that can be generated for church talents.

Special Window Fields – Talent Statistics

Member Tally

Total number of members who have the selected talent. Click the **Calc** button to update / display the proper total.

Special Event Statistics

The **Special Event Statistics** window defines the detailed statistical information that can be generated for special events. Several parameters are available for constructing the desired calculation. This criteria includes:

- Type of event (birth, baptism, confirmation, etc.)
- Member status (at the time of the event)
- Range of dates in which the event occurred
- Range of ages for members participating in the events

Select the criteria and click the **Calc** button to calculate the statistical information.

Special Window Fields – Special Event Statistics

Event Selection

Select the event. The available event list is determined by the Special Events Setup form.

Member Status

Select the status of the members to work with. The member status codes is defined on the Drop Down Preferences window.

Begin / End Date

Specify a beginning and ending date to calculate events within a date range.

Between Ages of

Specify a beginning and ending age range to limit the calculation by age.

Church Attendance Statistics

The **Church Attendance Statistics** window defines the detailed statistical information for church attendance. Several parameters are available for constructing the desired calculation. This criteria includes:

- Attendance for a particular category of event (as defined in Attendance)
- Number of events
- Total attendance
- Average attendance
- Attendance for all church services or by service

Select the criteria and press the **Calc** button to perform the calculation.

Special Window Fields – Attendance Statistics

Attendance Category

Press the **Select** button to choose the event category for attendance reporting.

Attendance by

The **Attendance by** field displays the method of attendance tracking used for the selected attendance category. ***Revelations*** tracks attendance at both the household and member level. The attendance tracking method for any given category is specified on the Attendance Category Maintenance window.

Count Events

To count the total number of events within a given attendance category, check the **Count Events** checkbox. Either the total number of events held within the selected event category or the number of events held by time slot can be counted.

Ttl Attendance

Click the **Total Attendance** checkbox to report on the total attendance for the selected attendance category. Either total attendance for all events or attendance to an event scheduled for one of the specified time slots can be counted.

Avg Attendance

Mark this checkbox to report on **Average Attendance** for all events or for an event scheduled in a specific time slot,. As an example, if an Attendance Category of “Sunday Services is selected and you want to report on average attendance for the 6:00 am sunrise service, mark the **Avg Attendance** checkbox and check the **Time #1** checkbox.

All Times

Click the **All Times** checkbox to report the total number of events, total attendance or average attendance for all events held within the selected attendance category,. As an example, to calculate total Sunday attendance across all worship services, check the **All Times** checkbox.

Time #1 - #6

To generate statistics for a specific event within the selected attendance category, mark the checkbox for the associated event time slot. Time slots are used to record information for each instance of a selected event (examples: bible study sessions scheduled at different times, church services, etc.)

Last Calculated On

The date displayed in this field is the last date on which these attendance statistics were calculated.

Special Buttons – Attendance Statistics

Select

Click the **Select** button to select the type of event (category) for which to generate attendance statistics.

Constant

The **Constant Statistic** window is used to enter any number (constant) that doesn’t change. An example would be entering the total membership from a previous year. This number could then be used to calculate the increase (decrease) in membership for the current year.

Special Window Fields - Constant

Constant

The constant value.

Subtract Lines

The **Subtract Lines** window subtracts one worksheet line total from another. Enter the Pg# and Ln# from the worksheet for the first entry followed by the Pg# and Ln# that is to be subtracted. Click the **Save** button.

Special Window Fields – Subtract Lines

Pg / Ln

The Pg / Ln values entered match the Pg# and Ln# entries on the statistical worksheet.

Tally

The Tally column is automatically updated to contain the specified value associated with the Pg / Ln entry.

Paragraph Heading

The Paragraph Heading is taken directly from the statistical worksheet represented by the Pg / Ln value.

Line Description

The line description is automatically filled in from the statistical worksheet represented by the Pg / Ln value.

Total of Lines

The **Total Line** window is used to total up to 6 lines of the worksheet.

Enter the page number and line number to be included in the total. Press the **Save** button to save the results and return to the main window.

Special Window Fields – Subtract Lines

Pg / Ln

Enter the Pg and Ln values that match the Pg# and Ln# entries on the statistical worksheet. The system automatically fills in the remaining columns

Tally

The sum of the page and line numbers entered.

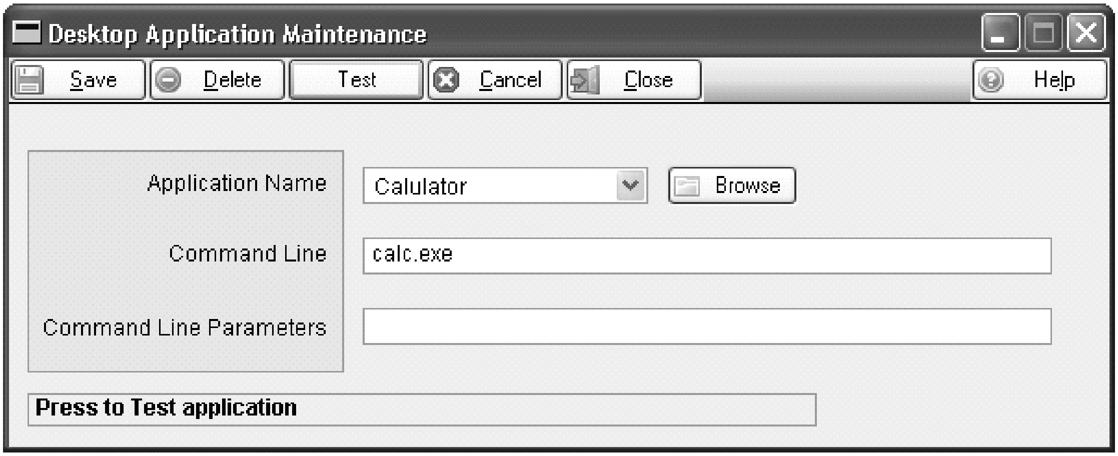
Paragraph Heading

Topic or heading for the page and line number entered.

Line Description

A detailed description of the page and line number entered.

Desktop Maintenance



The **Desktop Maintenance** window is used to link other Microsoft Windows applications to the ***Revelations*** desktop. An application "linked" to the ***Revelations*** desktop is then accessible from the Desktop Maintenance button. After linking an application to ***Revelations***, the application can be accessed from inside ***Revelations***. A maximum of 10 programs can be linked to this button.

Special Window Fields – Desktop Maintenance

Application Name

The name to use when referring to the application. To update an existing application, choose an entry from the drop-down list. To define a link to a new application, type the name of the application as you want it to appear on the **Reference** drop down button.

Command Line

The **Command Line** field contains the full path and program file name of the program that is being linked to. Use the **Browse** button to locate the program.

Command Line Parameters

To start the selected program with a set of parameters (to further control program operation), enter the parameters in this field.

Special Buttons – Desktop Maintenance

Delete

Delete the reference to the selected application.

Test

Click the **Test** button to test the link. When pressed ***Revelations*** will attempt to start the application.

Browse

Click this button to locate the application and fill in the contents of the command line.

Appendix

General Information

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Appendix

Installation

Insert the latest CD version into the CD drive. An installation menu should appear within 10 seconds. If the window does not appear, press the **Start** button and select **Run**. At the **Open** command line type in **d:setup** and press **OK**. Substitute the appropriate drive letter for the CD-Rom if it is not the 'd' drive. After the installation menu appears, select the program you would like to install.

Installation instructions for Revelations

- Select **Install Revelations** from the menu
- Click the **Next** button to walk through the setup process. It is recommended that the default actions be taken.
- When asked if this is a network installation use the following guidelines.
  a) Answer 'No', if this computer is not on a network or this computer is a server or workstation that will contain the data for other computers to access.
  b) Answer 'Yes', if this computer will be accessing the server or workstation that contains the data. Make sure to locate the 'SY0001.dat' file in the **DATA** folder on the server or workstation that contains the data.

Using Revelations

- Double click the ***Revelations*** icon on the desktop to start ***Revelations***.
- If a 'Product Information' window appears on the ***Revelations*** desktop then you are in the demonstration system. This section contains sample data to test with. A **Help** button is located on the top right portion of the menu bar on most windows. Press **Help** and then **Window Help** to find information pertaining to that window. Reports will no longer print once the number of households entered exceeds 15.
- If a 'Welcome' window appears then you are in the **Product** section. This is the section used by churches. The default user name is **Master** and the default password is **Reveal**. To help get you started press the **Help** button on the menu bar and select **Getting Started**.

Network Users

- The **Multi-User** option is required in order to share data with other computers
- Install ***Revelations*** on all workstations that will access the data. If a stand alone server is being used, it is best to install to the server first.
- A drive must be mapped from the workstation to the server before ***Revelations*** is installed. Mapping a drive is done using the Windows Explorer.

Buttons

Many of the **Buttons** found in ***Revelations*** are common to many screens and perform the same function. Rather then describing them on every form they are included here.

Reports

The **Reports** button is always located on the top left corner of a form. Pressing this button will open another window displaying report options for the form. These reports are quite often found under the ***Revelations*** main menu **Reports** option.

Print

The **Print** button is located on screens where there is an option to print the reports, create merge files or print mailing labels. Clicking this button will begin the process of building a report based on the parameters given.

Save

This button will save any changes made to the current screen. The screen may or may not be cleared after the save is complete.

Add New

Click the **Add New** button to be presented with a clean form to add new information to the database.

Delete

This button will delete the active record from the database. An exception to this is the **Delete** button on the household form. Here the **Delete** button changes the status of the household to a 'Delete' status. To remove a household from the database, set the household status to 'Delete', go to the Household List and set the 'Household status to view' to 'Delete'. Select a household and press the button **Delete a household**. To remove several households at once, set their status to 'Delete' and go to **People – People Utilities**.

View/Edit

The **View/Edit** button opens a maintenance form displaying information about the selected record in a list of records. Use the maintenance window to update information.

Quick Find A-Z

The A-Z buttons that appears next to various scroll windows, jumps to the first record matching the selected letter.

Refresh

The refresh button redisplays (refreshes) the window. Sometimes a window's information changes when several windows are open or another computer on a network is making changes. Pressing the **Refresh** button reloads the latest copy and displays it.

Find

This is available on most screens where there is the need to look up something such as a household or member.

Close

Closes the active form. A message will appear asking whether you want to save changes made if changes were made and the **Close** button was pressed before the **Save** button.

Min/Max View (Expand Button)

Located next to the **Help** button on the forms it will open a small window providing additional information about the highlighted row of information.

Help

Located on the top right of each form it has two options when pressed. One is 'Window Help' which opens a help window providing assistance on the active window. The second option is 'Custom Help' that lets you enter your own comments about the use of this window.

Valid Dates

Revelations performs many math calculations using date fields, consequently, the correct format must be adhered to. That format is ddmmyyyy and is commonly called the ‘Century’ format because the year portion of the date is 4 digits. To check the date format your Windows operating system is using, do the following:

- For Windows operating systems prior to Windows XP
  a) Go to the Windows Control Panel
  b) Double click the icon titled ‘Regional Settings’
  c) Click the ‘Date’ tab
  d) In the field titled ‘Short Date Style’, select the option ‘MM/dd/yyyy’ from the drop down.
  e) press the **OK** button
- For Windows XP operating systems
  a) Go to the Windows Control Panel
  b) Double click the icon titled ‘Regional and Language
  c) Click the **Customize** button
  d) Click the ‘Date’ tab
  e) In the field titled ‘Short date format, select the option ‘MM/dd/yyyy’ from the drop down.
  f) press the **OK** button

Menu Bar Options

Below is a list of options available from the menu bar and what they do.

File

Change Churches - Ctrl + G

This will bring up the Revelations Welcome Screen. Sign in as a new User or go to a different Church database if you have the multi-database license.

Change Users - Ctrl + U

This is the same as selecting "Change Churches

Print Setup - Ctrl + S

Modify the setup options for your printer or select a different printer driver. The **Print Setup** window is documented in greater detail in your Microsoft Windows® documentation.

Process Moniter - Ctrl + M

Monitors the processing of a job in Revelations. The window will display any active background process within Revelations such as posting or background print jobs.

Report Writer

Access the Report Writer. This option is dimmed and not available unless the Report Writer option was purchase.

Getting Started

Help File for Getting Started in Revelations.

Import Addresses

Only records created by the **Export Address** option can be imported. This is most often used to update the addresses once they have been Cass certified. Cass certification is the process by which an address is compared against a national data base of addresses prepared by the US Post Office.

Export Address

Export Revelations addresses into a Comma delimited file format. Usually, this is done to Cass certify addresses or to pass the information to a word processor.

Year-End Processing

Guides you through the correct sequence of events for performing year end activities. See System Preferences: Year End Processing

Exit

Close Revelations. Revelations can be closed without first closing all windows.

Edit

Change Telephone Codes

Use this form to perform a mass change to the database when a segment of the telephone number changes. Enter the current area code and the first 3 digits of the phone # (city code) that are in the area code being changed. When all phone numbers in the area code are being changed, leave the setting to **ALL**.

Next, enter the new area code and the first 3 digits of the phone # (city code) that are in the area code being changed. If all phone numbers in the area code are being changed, leave the setting to **ALL**.

Change Zip Codes

Use this form to perform a mass change to zip codes when the zip code of your city or portion of the city is changing.

Enter the current zip code, the telephone area code and the first 3 digits of the phone # (city code) that are being changed. If the zip code for all areas is being changed, leave the settings to **ALL**.

Next, enter the new zip code and the telephone area code plus the city code that is being changed. If all city codes are being changed, leave the settings to **ALL**

Conversion to version 5

Used when a church upgrades from version 4 or older to a more recent version. This option must be used before 'Conversion to version 7' when their existing version is version 4 or older.

Conversion to version 7

Used when a church upgrades from version 5 or 6 of Revelations to a more recent version.

Conversion to version 9

Used when a church upgrades from an older version to version 9.

Conversion to version 11

Used when a church upgrades from an older version to version 11.

Conversions

This option is only used to initialize a ***Revelations*** database by converting a database from either Membership Plus or Shepherd's Staff.

Internet

If you have Internet Access from your computer, choosing the Internet menu from the Menu Bar will allow direct access to the following Web sites.

Revelations Order Desk

Takes you to the ***Revelations*** web site. From there you can order ***Revelations*** or options for ***Revelations***. Access to the Internet from your computer must exist for this option to work.

Customer Web Site

Takes you to the Revelations Support Center. Once connected, go to the download section where you can read about reported problems and enhancements and download the ***Revelations*** version updates. The product update code file is small and can fit on a diskette. For single user installations it works best to save the download file into the 'Church' folder where ***Revelations*** is stored. The web site address is www.revelations.com/revcust.htm.

My Web Site

This is available for churches that have purchased the web site option allowing them to post information to their web site using ***Revelations***.

Update Revelations

This option will check the internet to make sure you are using the most current code of version of Revelations the system is running. (ex. Will update from version 11.01 to 11.05). This will not update Revelations from one major version to another.

Macro

This option allows you to create macros for repetitive tasks. Recording a macro is the process of recording keystrokes and saving them to a file that you name. At some future time the stored macro can be re-called and it will replay itself. To record a new macro, name the macro and then follow the directions for recording the macro.

Window

Displays all open ***Revelations*** windows. Making a selection will bring that window to the foreground and make it active.

Help

The Help option shows the various Online Help options available. Select **Window Help** to open the on-line manual for ***Revelations***.

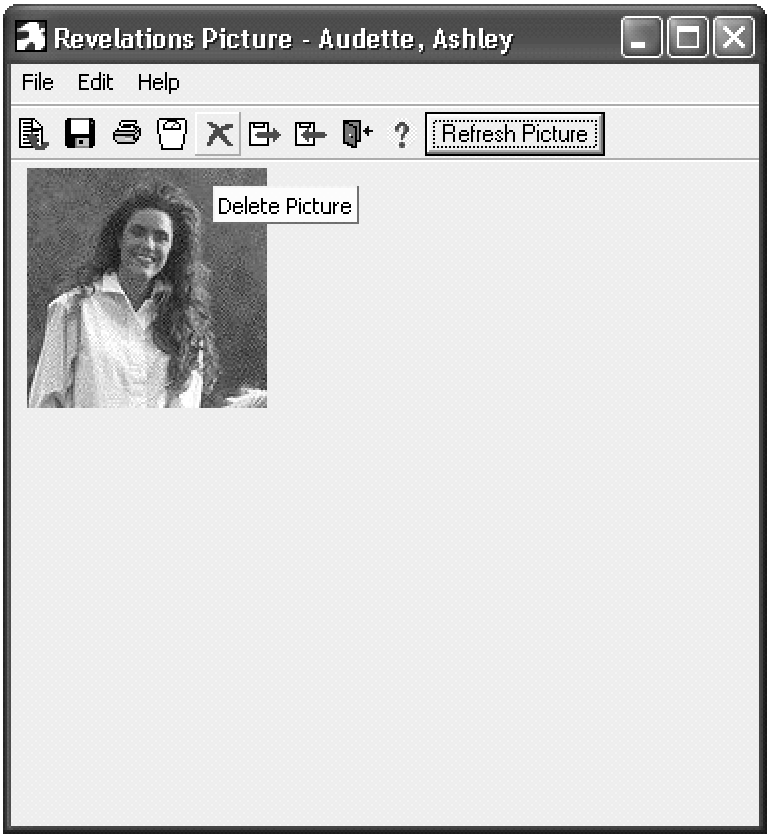
Window Help
Open the ***Revelations*** Help book.

Revelations Answer Book
This opens a help book that lists answers to many common questions and solutions.

Getting Started
A getting started guide for new users to ***Revelations***.

About Revelations
The Technical Support telephone number, Address and ***Revelations*** version number is listed here.

Pictures



Pictures can be assigned to households, family members, and to groups. To associate a picture with one of these 3 categories, press the **Picture** button on the associated form. A pictorial directory can be printed for households by selecting **Pictorial Directory** under the **Reports** button.

Note: If the colors do not show up well, go to **Control Panel** : **Display** : **Settings** and check the colors option. Use at least 256 colors. 16 colors won't work.

Use the **Refresh Picture** button to reload the picture from the Revelations database. This is useful when you want to erase changes made using the scaling feature.

Menu Options under File

Load – Locate a picture. The picture can be of several types but it will always be saved in jpeg format for Revelations.

Save – Save the picture in the Revelations database. Saving the picture associates it with the form you came from. To print a pictorial directory, all pictures should be saved at the same size.

Print – Print to paper a copy of the picture

Scale – Scaling a picture allows its size to be changed. Notice that the width or height will change automatically when you change its height or width. This is done to keep it in the same proportion as the original. Press the button **Reload @ 100 %** to restore the original size. Use the button **Scale to Fit** to establish a consistent size for all the pictures. This becomes the default size used by the **Pictorial Directory** and will make the process of creating a directory easier.

Menu Options under Edit

Delete – Deletes the picture from the Revelations database.

Copy from Clipboard – Copy the contents of the Windows clipboard onto the Revelations canvas.

Copy to Clipboard – Copy the contents of the Revelations canvas to the clipboard.

Change Users

The **Change Users** function allows you to quickly login to ***Revelations*** as another user or to change databases (from demo to product databases). To access, select **File** on the menu bar and then **Change Users**. 'Change Users' and 'Change Churches' provides the same functionality.

Special Window Fields – Change Users

User Name

User names are defined in ***Revelations*** to ensure security of all the information recorded in the system. To access ***Revelations***, type in your user name. If you do not have a user name, have the ***Revelations*** administrator setup a new user name using the **Security Maintenance** window.

When using ***Revelations*** for the first time, use the following user name and password to login:

User Name :	Master	This field is case sensitive.
Password:	Reveal	This field is case sensitive.

Password

Type the password established for your user name. If you do not have a password or forgot your password, have the ***Revelations*** administrator change your password using the **Security Maintenance** window.

System Type

Run either a "demonstration" copy of the system or the ***Revelations*** product (as many as five different databases can be selected if you have the multi-database option) using the **System Type** drop down list.

Special Buttons – Change Users

OK

When the **OK** button is pressed, the system verifies the user name and password entered. If both are verified, you are "logged into the system – ready to use ***Revelations***.

Cancel

The **Cancel** button closes the **Welcome to Revelations** window.

Report Writer

When the **Report Writer** option is purchased it can be accessed from two different areas: 1) Click the **File** option on the top menu bar and select **Report Writer** or 2) a **Report Writer** button appears on the top line (far right) of the Revelation menu bar. Accessing the report writer takes you out of Revelations and opens a window. Press the button titled **Reports**. This opens a window with two large scroll windows. The left scroll window lists all the reports that come with the ***Revelations*** product. The right scroll window lists all the reports that were either added or modified by your church.

Modifying a Report

Before a report can be modified its name must be known. This is done by running the report in ***Revelations*** and when the **Report Destination** window appears write down the report name. Select this report from the left scroll window and press the **Insert** button. A copy of the report will be placed in the right scroll window. Select the report in the right scroll window and press the **Open** button. The report is now ready for modification. This report can be run from ***Revelations*** just as before except ***Revelations*** knows the report was modified because it exists in the right scroll window and runs that one. To return to the original report, go into the **Report Writer** and delete the modified report from the right scroll window.

Adding a New Report

New reports can be added to the system by pressing the **New** button when in the **Report Writer**.

More Information

Additional information about fields, data types and tables can be found by pressing the associated button on the **Report Writer** menu bar. In addition to the manual authored by Great Plains, Microsoft there is an on-line manual directed to churches. This on-line manual can be opened in the **Report Writer** by pressing the **Help** button and selecting **Contents**.

Return to Revelations

Go to **File – Revelations** to return to the ***Revelations*** system. You will be asked to re-enter the user name and password.

Group Schedules

Group schedules are prepared in ***Revelations*** by selecting ‘People – Scheduling – Event Scheduling. An event can be created for one day, several consecutive days, or multiple weeks and all with one or more times per day for each event. One or more groups can then be assigned to one or more events. Posting a Group Schedule will send to the Internet all the events from today forward for the event(s) selected. **Important:** To keep your web site clean of obsolete information and to reduce maintenance time, all group schedules at the site are removed as part of the posting process. What this means is: be sure to select all groups that should appear on the Internet each time groups are uploaded. This is a great way to keep choir groups, ushers, etc informed as to the day and times they are scheduled. Schedules are not displayed once they go beyond the current date.

Misc Schedules

Misc Schedules are prepared in **Revelations** by selecting ‘People – Scheduling – Misc Schedules. Any type of category and item can be created. Examples would be a category of School Building and items would be room numbers. Select an item, identify who the item is reserved for and then select the day(s) and time of day. Any scheduling conflicts are seen immediately on the scheduling calendar. Schedules can be selected for uploading to the Internet. . **Important:** To keep your web site clean of obsolete information and to reduce maintenance time, all existing schedules at the site are removed as part of the posting process. What this means is: be sure to select all schedules that should appear on the Internet each time schedules are uploaded. Once at the Internet they are available under the heading of Scheduled Items. When a schedule at the Internet becomes obsolete it isn’t shown.

Talent Lists

Talent lists are prepared in ***Revelations*** by selecting ‘People – Talents’. Talents can be of a ministerial type or vocational type. To promote community within your church, create talent categories such as Legal, Medical, Mechanical, etc. Then create the various groups within each category and post them to the Internet. **Important:** To keep your web site clean of obsolete information and to reduce maintenance time all existing talents on the Internet are removed during the posting process.

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