

How to Import Adventist Giving into Jewel version 8 or 9
Option 2: Import from a File

- ✓ *This method will import any report, even from previous months.*
- ✓ *This method enables you to wait until the end of the month and then import both monthly reports.*
- ✓ *This method downloads the report to your computer and imports it from there, rather than connecting directly to Adventist Giving.*

Before you begin:

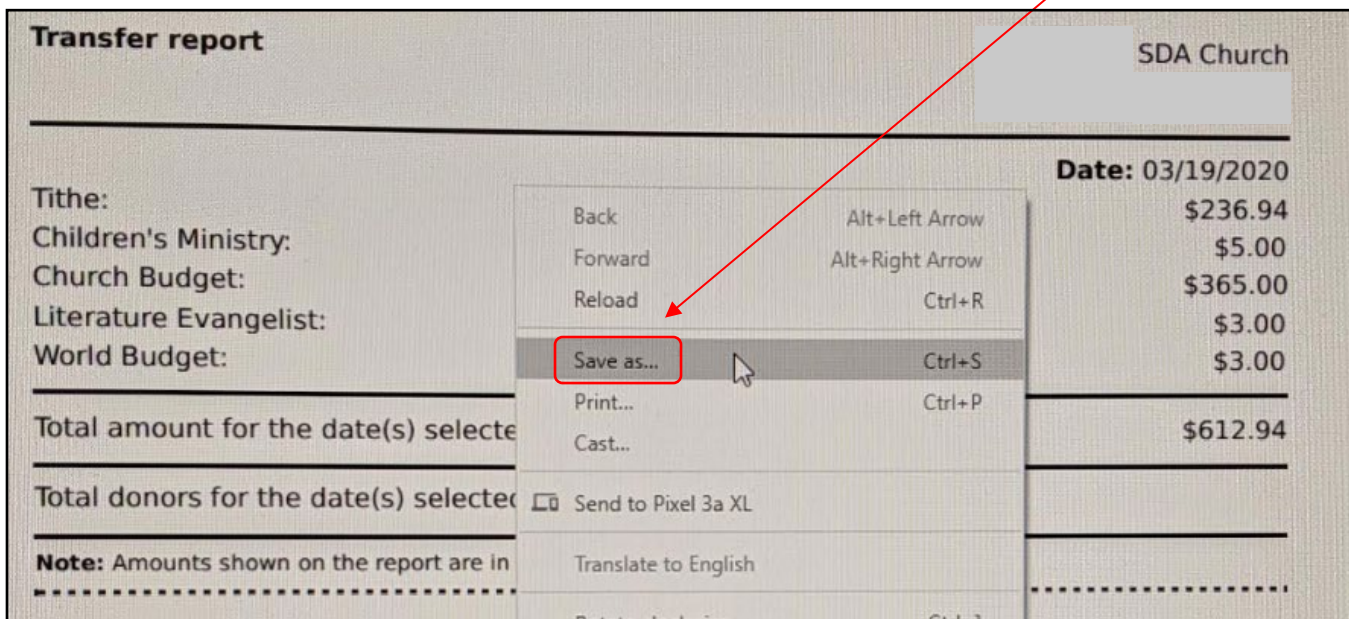
- A. Update Jewel to the latest version by going to “Help” at the top of Jewel Home Page. Click on “Check for Updates.” If there are updates, click “yes” and download.
- B. Use Chrome as your browser.
- C. Create a new folder on the desktop of your computer and rename it "Adventist Giving." (If you need help with this step, be sure to ask for it.)

1) Log into your church’s Adventist Giving account, using the “AG – Log In” instructions provided.

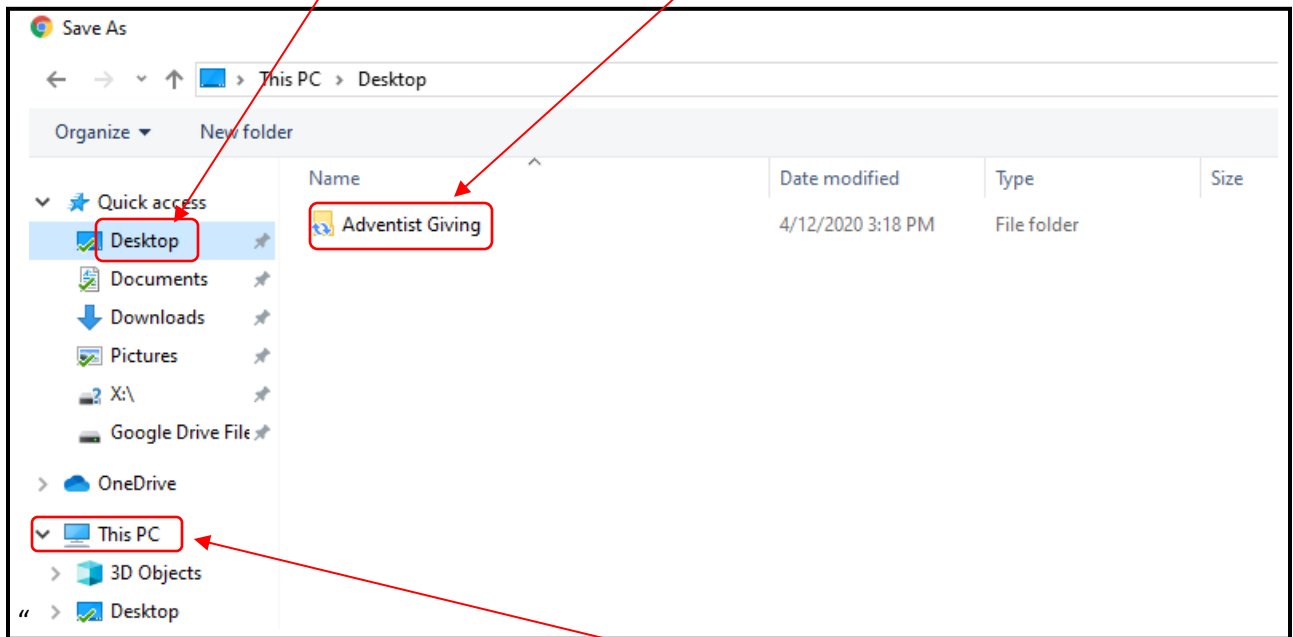
2) Choose which report to download, using the “AG – Overview and Fundamentals” instructions provided.

3) Save that report to the Adventist Giving folder on your computer desktop, using the following instructions.

While the PDF is still on your computer screen, right click anywhere on the report. Select “Save as” or “Save Page As.” (if you were not able to create an “Adventist Giving” folder on your desktop, ask for help the first time you do this)



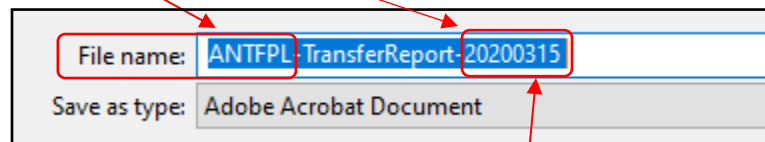
Locate and click on “Desktop,” then click on the Adventist Giving folder that you created.



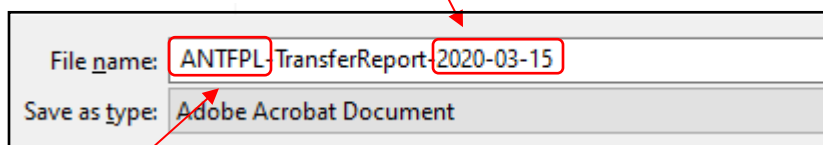
NOTE: If at first you don’t see “Desktop,” You may need to click on “This PC” first.
After the first import, Jewel will remember where this folder is and you should not have to go looking for it.

Once the Adventist Giving folder is open, it may say “No items match your search” or something like that to let you know that the folder is empty so far.

Along the bottom of that screen, the deposit report file name will be formatted something like this. Six capital letters (your church’s Entity ID) and eight numbers at the end.



Those numbers specify the date of the report. If you edit the “file name” slightly by entering hyphens in between the year, month and day, it will be easier to identify as a date and you will avoid importing the wrong report.



NOTE: Your church’s 5 letter Entity ID will be different than this one. That is ok.

Click on “Save” (down in the bottom right of your screen.) This will save a copy of this PDF in your “Adventist Giving” folder.

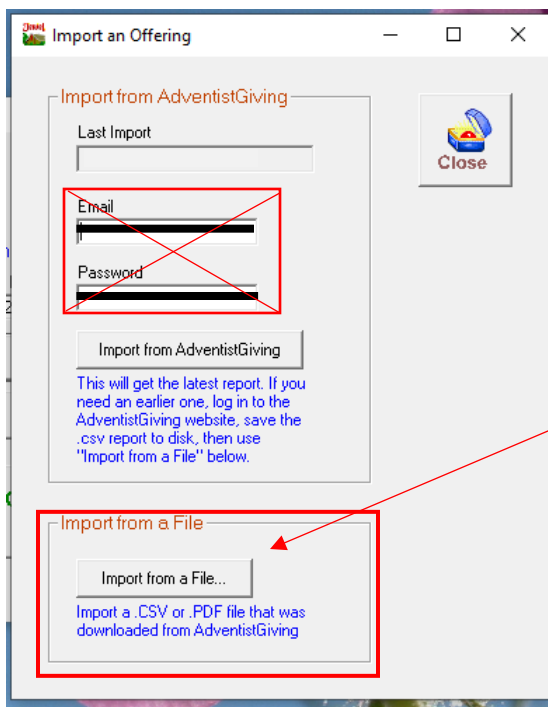
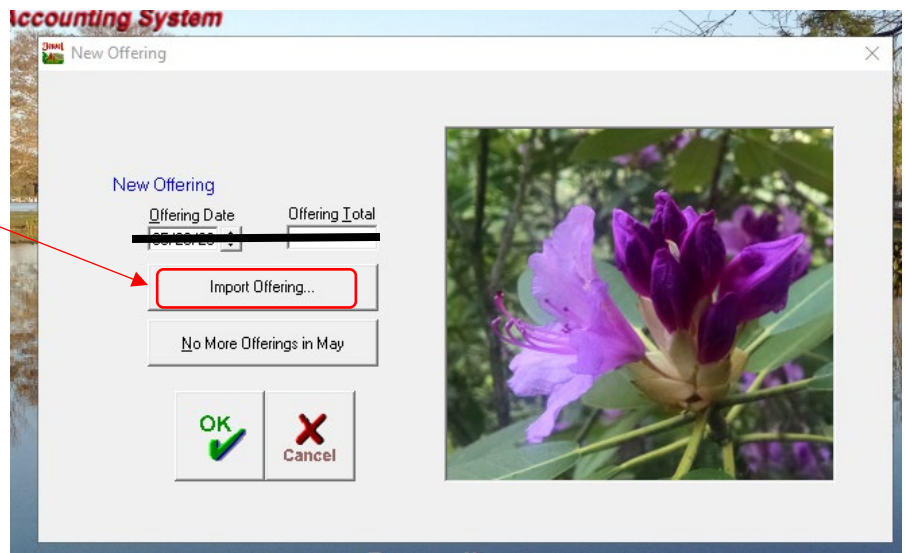
Repeat from Step 3 if you wish to download additional deposit reports before you sign out. The steps are:

- Click on the “PDF” button of the report you wish to save/import.
- When the PDF report appears on your screen, right-click anywhere on the report. Select “Save as” or “Save Page As.”
- Locate the Adventist Giving folder on your Desktop. Edit the default name of the deposit report by putting hyphens in between the year, month and day numbers at the very end of the name.
Ex: ***** – Transfer Report – 20180331 should say ***** – Transfer Report – 2018-03-31
- Click on “Save.”

4) Open Jewel to begin the import.

Click on “Start New Offering” in Jewel

In the screen that appears, ignore the date and amount boxes and click on “Import Offering.”



When this window opens, do not enter an email and password at the top of the box.

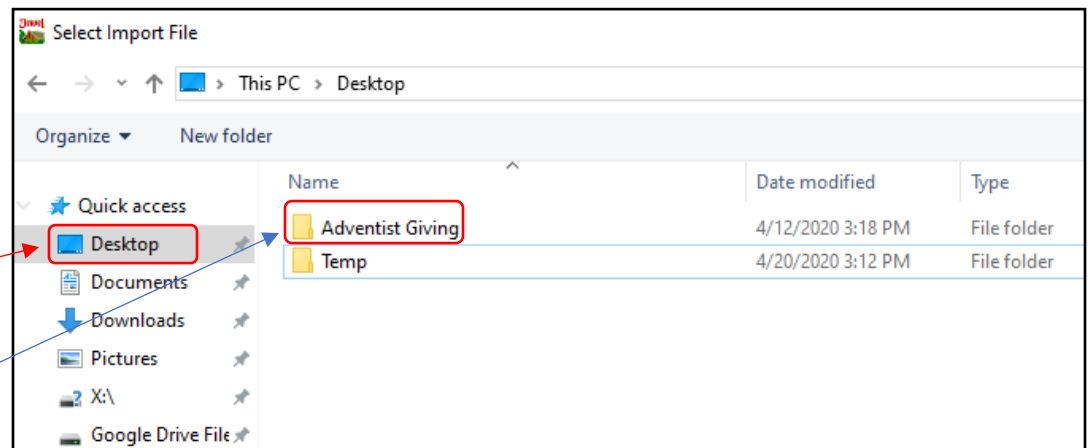
Go directly to the bottom section and click on “Import from a File.”

5) Locate the desired report in the Adventist Giving folder on your computer desktop

The first time you do this, you will need to locate the report.

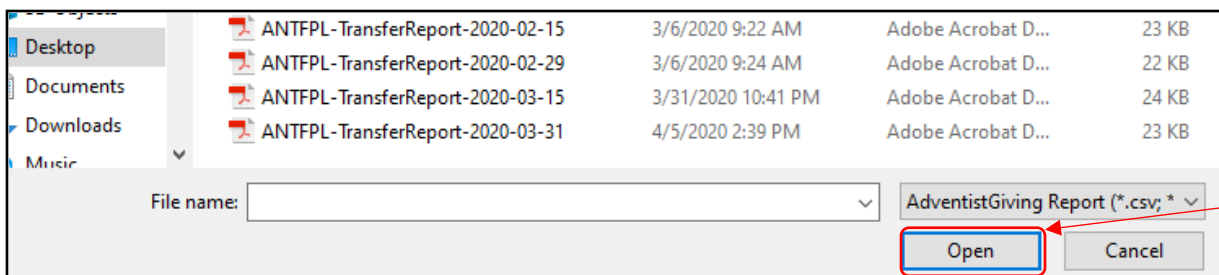
Click on “Desktop.”

Then click on the “Adventist Giving” folder.



NOTE: After the first import, Jewel should automatically take you to your Adventist Giving folder. You should not have to go searching for it.

This folder should contain a list of Adventist Giving Reports that have been saved. They will all be lined up in date order, and if you have edited the date on the report name, the correct report will be easy to locate.



Find the deposit report that you wish to import, click on it, then select “Open.”

This brings you to the screen where Adventist Giving donations and Jewel accounts meet to compare notes and ensure that the donor’s wishes are being followed.

6) Map Accounts and Donors using the “AG – Mapping Basics” instructions provided.

Once all the red accounts and names are mapped, click the green OK in the top right and Jewel will open the “Make Deposit” screen.

Make Deposit - 05/15/23

Make Deposit

Deposit Info

Offering Date	# Envs Entered	Cash	0.00
05/15/23	34	Checks	19,015.51
		Total	19,015.51

Deposit Date: 05/15/23
Memo: AdventistGiving 5/15/23

Bank Account for Deposit: 8001 Checking

Trial Deposit...

ID	Account	Amount
7338	Worthy Student Fund - GCA	1.00
7550	Conference Disaster Donations	1.00
7951	Cohutta Springs	1.00
77101	ACS S GA Building Fund	1.00
77210	Georgia-Cumberland Ministries (Co	51.00
77500	Atlanta Adventist Academy Worthy	1.00
77555	Samaritan Center - CFC Chattanooga	31.00
77994	Conference Camper Funds	1.00
Conference Funds		13,965.77
7320	Conference Elementary Schools	1.00
8200	CHURCH BUDGET	3,305.79
8600	New Building Fund	1,598.95
8720	Adventurers	1.00
9020	Evangelism - Locally Funded	1.00
9060	Community Center - Local Funds	41.00
9110	SS Expense - Local Funds	1.00
9502	Piano Fund	100.00
Local Funds		5,049.74
Deposit Total		19,015.51

Trial Contribution Report...

Make Corrections...

Take a moment to check:

1. Do these two totals match? 99% of the time they will, but if they don't, it is probably a mapping error and you will need to contact me to fix it.

If you don't catch it at this step, you will find it when you are trying to reconcile and it will take a lot longer to fix then. It takes 2 seconds to check it. Do it every time.



If the totals match, you can click on the green "OK ✓" in the top right and you are done!

NOTE: Don't close out any month until you have entered both Adventist Giving offerings for that month – the one dated the 15th and the one dated the last day of the month, using the Cutoff Date.