

## Transfer People From/To Membership & Donations

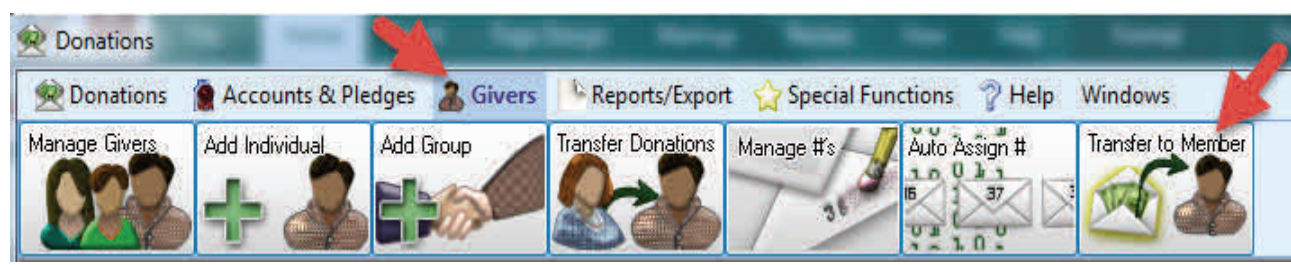
(11/18)

When people are entered into your Church Windows database, they are entered as either Membership or Donation Givers. The module they are entered in determines how much information you are able to track for each type of giver. Typically, Donations givers are people who only give to the Church but do not attend or come once and are not expected to return. Membership givers are people you need to track information for such as family members, ages, attendance, etc. If these circumstances change, you need to move people from one module to the other.

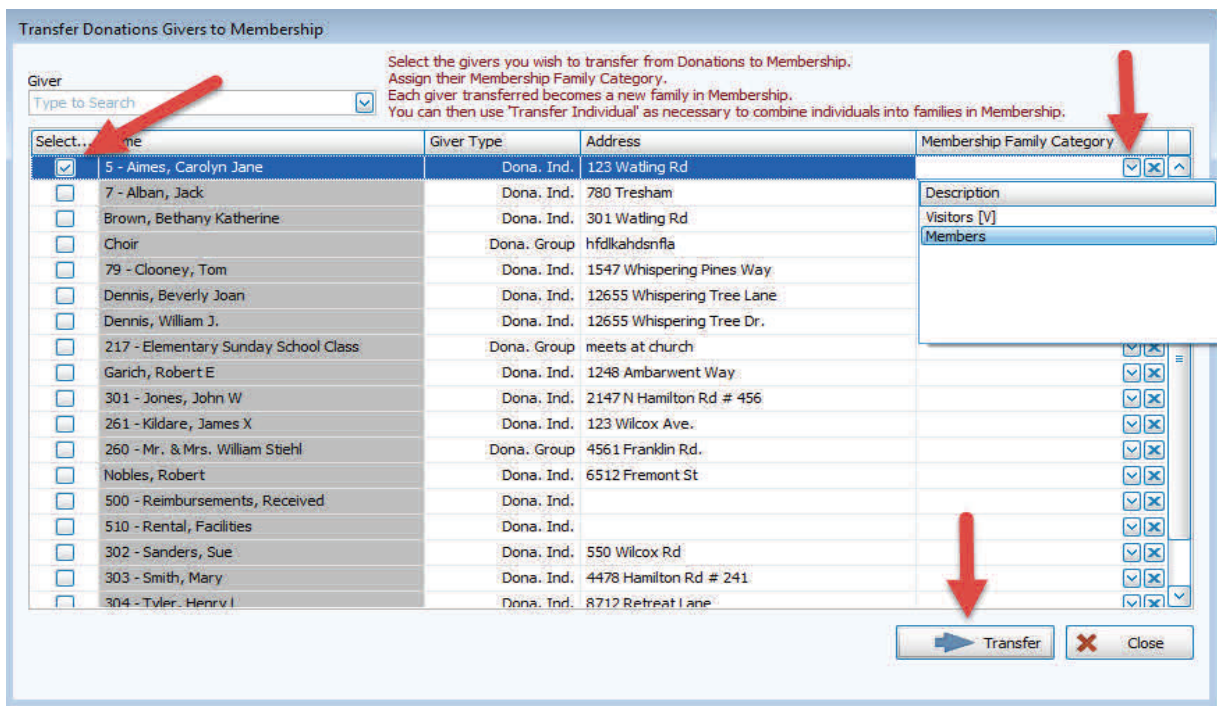
ALWAYS make a backup before you begin this process. Go to Administration>Backup.

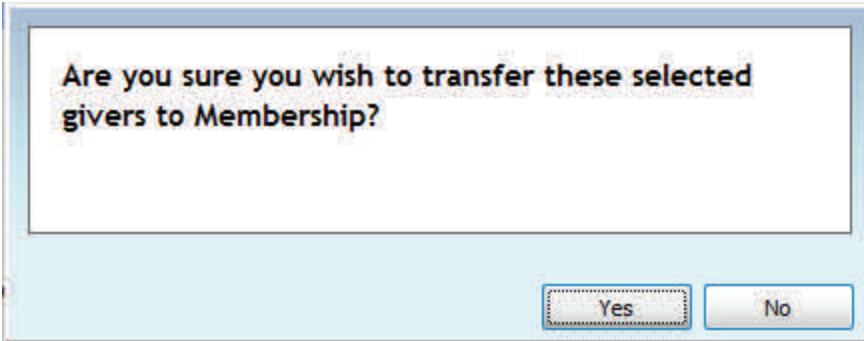
### Transfer from Donations Givers to Membership

Go to Donations>Givers>Transfer to Member



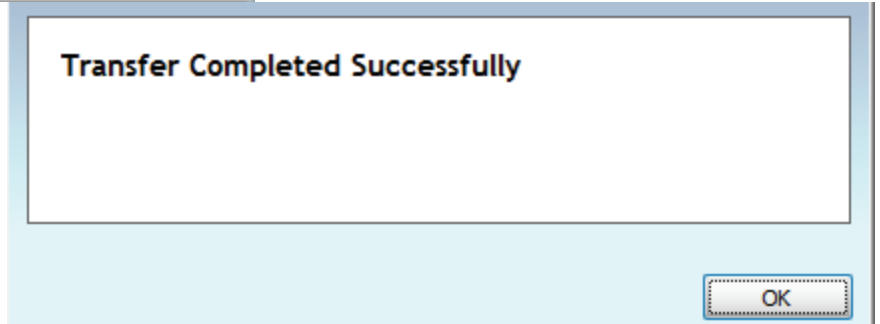
Transfer Donations Givers to Membership screen appears, check each person you want to transfer and select the Category, then click Transfer.





A window opens to confirm that you wish to complete the transfer, click Yes or No.

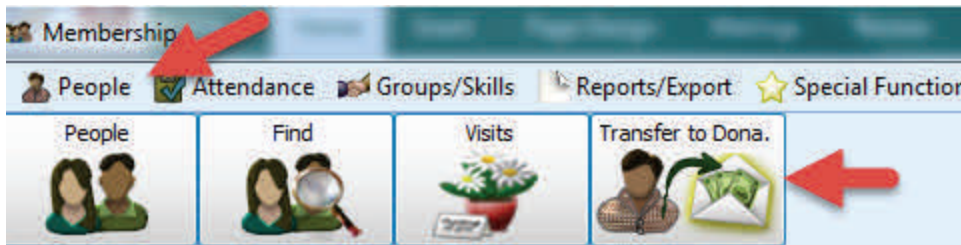
If Yes was selected, a confirmation screen will open which lets you know the transfer was successful.



### Transfer from Membership to Donations

ALWAYS make a backup before you begin this process. Go to Administration>Backup.

Go to Membership>People>Transfer to Dona.

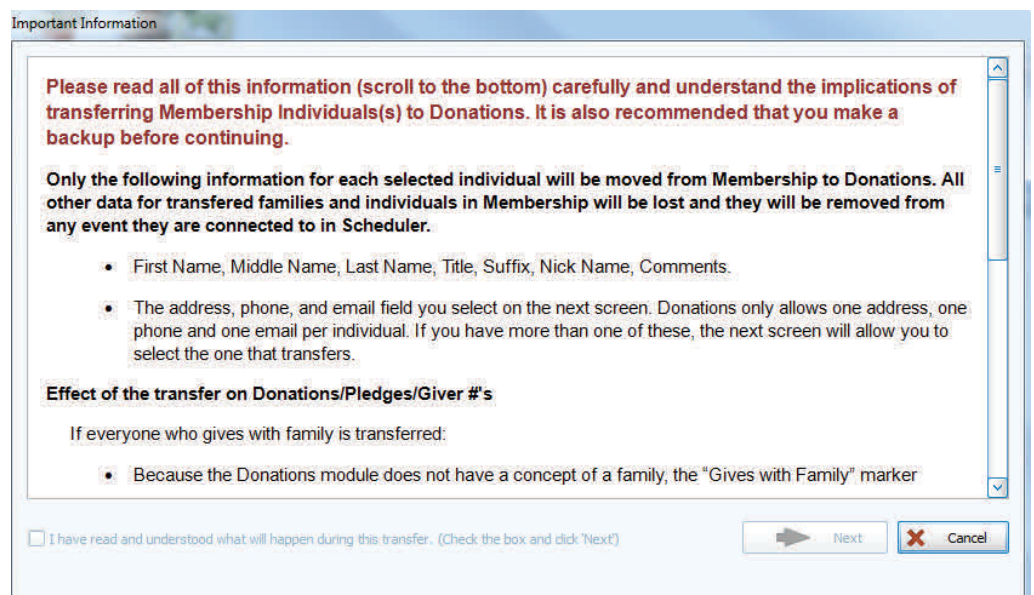


An *Important Information* message box appears.

**Please read all of the information to fully understand the implications of transferring Membership Individuals to Donations Individuals.**

Once you have read the entire message and are completely certain you want to go ahead with the transfer, check the box stating "I have read and understood what will happen during this transfer".

Click Next.



On the *Transfer Individual(s) to Donations* screen, put a checkmark next to each person you wish to transfer to Donations.

If you are transferring a person who *Gives with Family*, you will need to choose one of the individuals to keep the giving and pledging for the family.

If there are multiple addresses, phone numbers and/or emails for each individual, you will need to select one to store in Donations, because you cannot keep more than one per Donations Individual.

**Transfer Individual(s) to Donations**

Choose the individual(s) you wish to transfer to Donations. Choose the address, phone, and email you want them to have in Donations if they have more than one. If necessary, use the right most column to select who will get the Giver # and Pledge(s). Other information shown on this grid will not be transferred to Donations.

Person  
Type to Search

Select...	Name	Giv w/ Fam	DRO	Fam Rel	Address	Phone	Email	
<input checked="" type="checkbox"/>	<b>Mr and Mrs William Bell</b>							
<input checked="" type="checkbox"/>	969 - Bell, Bill	<input checked="" type="checkbox"/>	1		6431 Elm Pike	(223) 555-8745	BBell@faux.com	<input type="checkbox"/>
<input checked="" type="checkbox"/>	969 - Bell, Donna	<input checked="" type="checkbox"/>	2		6431 Elm Pike	(223) 555-8745		<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Mr Dylan Bernard</b>							
<input type="checkbox"/>	<b>Mr and Mrs Evan Bernard</b>							
<input type="checkbox"/>	<b>Mr Ian Berry [V]</b>							
<input type="checkbox"/>	<b>Ms. Andrea Brown [V]</b>							
<input type="checkbox"/>	<b>Ms. Joanne Clarkson [V]</b>							
<input type="checkbox"/>	<b>Ms Bella Cuckler [V]</b>							
<input type="checkbox"/>	<b>Mr Christian Day</b>							
<input type="checkbox"/>	<b>Ms Caroline DeSmit</b>							
<input type="checkbox"/>	<b>Mr Trevor Dowd [V]</b>							
<input type="checkbox"/>	<b>Abigail Ellison [V]</b>							
<input type="checkbox"/>	<b>Mr and Mrs Brian Ellison</b>							
<input type="checkbox"/>	<b>Penelope Ellison</b>							
<input type="checkbox"/>	<b>Mr Jonathan Fisher</b>							

Giver # and Pledges (if any) will be assigned to this person upon transfer to Donations.

Are you sure you wish to transfer these selected people to Donations?

A window opens to confirm that you wish to complete the transfer, click Yes or No.

If Yes was selected, a confirmation screen will open which lets you know the transfer was successful.

Transfer Completed Successfully