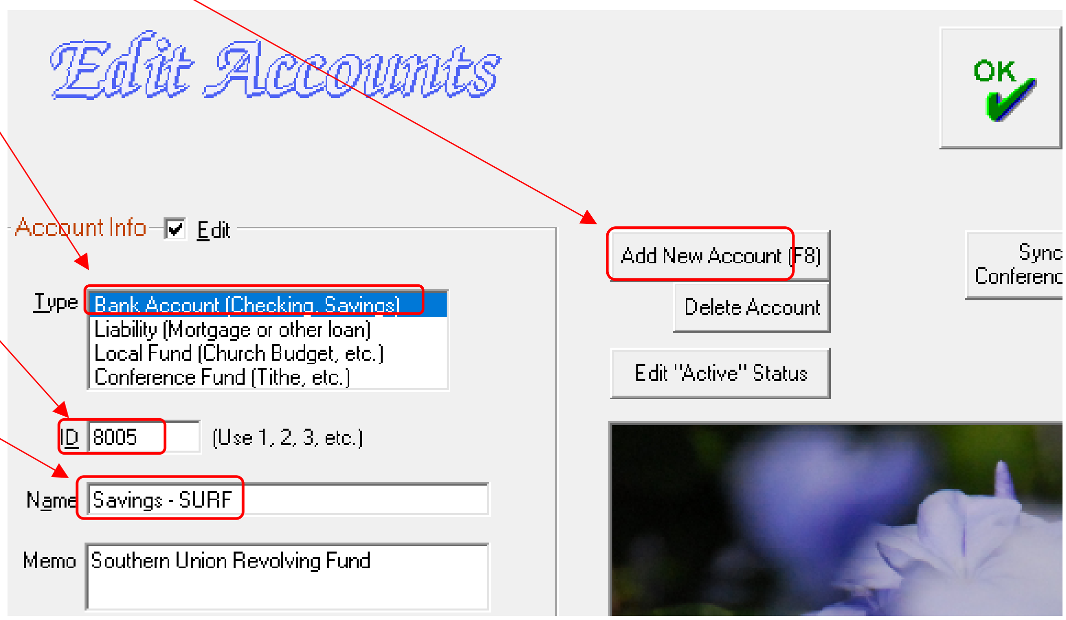
Opening a New Revolving Fund and Setting It Up in Jewel

Each Union in the North American Division has a “Revolving Fund,” where churches and schools can earn interest on currently unneeded funds and others can borrow from these funds to help pay for needed upgrades or building projects. Here in the Southern Union, our revolving fund is called the “Southern Union Revolving Fund” or just “SURF.”

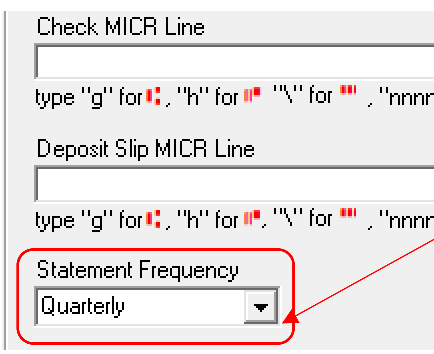
1. If your church has never had a revolving fund account before, contact your conference office or google your union’s revolving fund. “Southern Union Revolving Fund.” “Columbia Union Revolving Fund.” Lake Union Revolving Fund” etc for instructions on how to set up an account and send a check.

1. If your church has never had a SURF account before, this is how to set it up in Jewel:

a) Go to “Maintenance (top bar of home page)/Edit Accounts”
b) Click on “Add New Account”
c) Click on “Bank Account”



d) Enter an Account ID #. It will vary, depending on what other accounts you already have, but try to make it land somewhere near your other bank accounts.
e) Enter “Savings - SURF” as the name.



f) Go to the bottom of that column and use the little triangle to change the “Statement Frequency” to quarterly. (it can be reconciled monthly if it is active and you wish to do it that way.)

g) Click on “OK √” to save and close.

See Tutorial #4610 for SURF Deposit, Withdrawal and Reconciliation instructions.

For more tutorials on CREDIT, DEBIT CARDS AND REVOLVING FUNDS, see section 4500 on the gccsda.org auditor webpage.

This information has been brought to you by the Georgia-Cumberland Conference Audit Team
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