

Budget Allocations - End-of-Year Rollover

If your church has monthly Budget Allocations set up in Jewel, they will expire when you close December. If you want to keep the same allocations into the next year, roll them over, as it were, there is something that you must do before then.

Even if your church is working on new budget allocations for the next year, rolling them over and then editing them is easier than having to enter them all from scratch, so I recommend this easy process.

Go to Maintenance/Edit Budget Allocations, find and click on the box that says "Copy from This Year to Next Year." That is all it takes!

If you want to make sure that it is saved, click on the little round "Next Fiscal Year" button. The next year budget allocations should be filled out, with identical numbers to the current year.

Edit Budget Allocations

Budget Year:

☒ This Fiscal Year (2025)

☐ Next Fiscal Year (2026)

Copy from This Year to Next Year

Don't forget to click on "OK ✓" to save and leave the page. If you click "Cancel" it will not be saved.

If you do not do this, all your allocations will disappear when you close December and you will need to enter them all again.

Don't wait, do it now.

For more JEWEL PROGRAM BASIC FEATURES tutorials, see section 7000 on the gccsda.org auditor webpage

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