Properties in Jewel – a tour of the options

Here is a quick tour of the part of Jewel where you can make changes to settings and properties.

Tab #1: Clicking on “Maintenance” (top bar) then “Properties” then the **“Church Info” tab.** brings you to this first screen, where you find:

Entity ID: If it is not filled in, you can click on “Select Your Church to see if the entity ID is available. If it is not, just leave it the way it is.

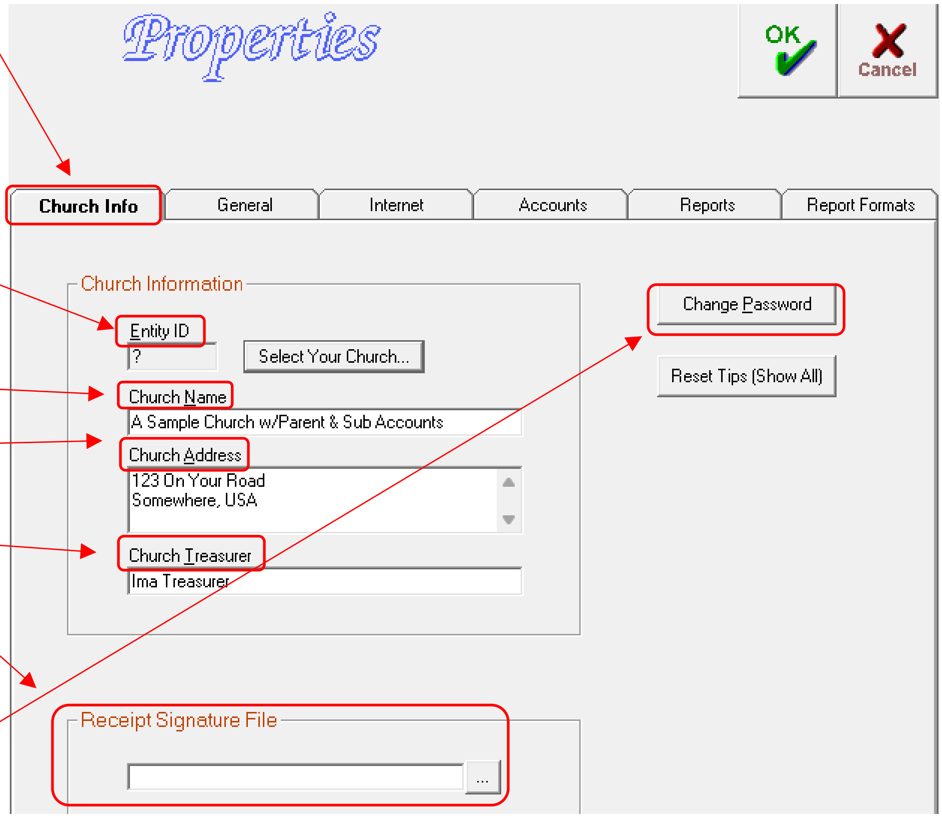
Church Name

Church Address

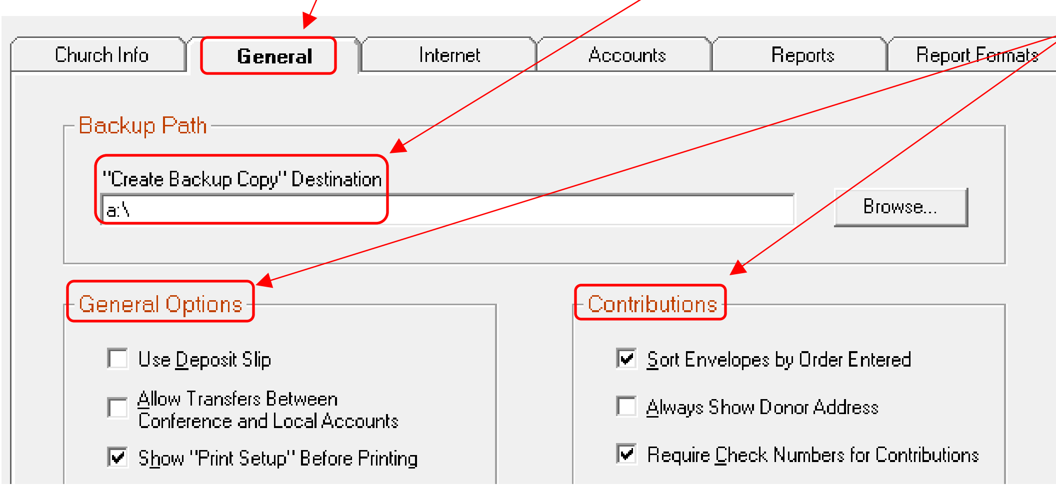
Church Treasurer name

The **Receipt Signature** can be used to sign your name to all the donor receipts at end of year. *(See Tutorial #7240)*

The **Jewel Password** can be changed here too.



Tab #2: Moving on to the **“General” Tab**, the **“Backup Copy Destination”** is set up here. Probably only changed when you get a new USB or a new computer. *(Tutorial #7280)*



The two top half sections include some settings that are mentioned in tutorials.

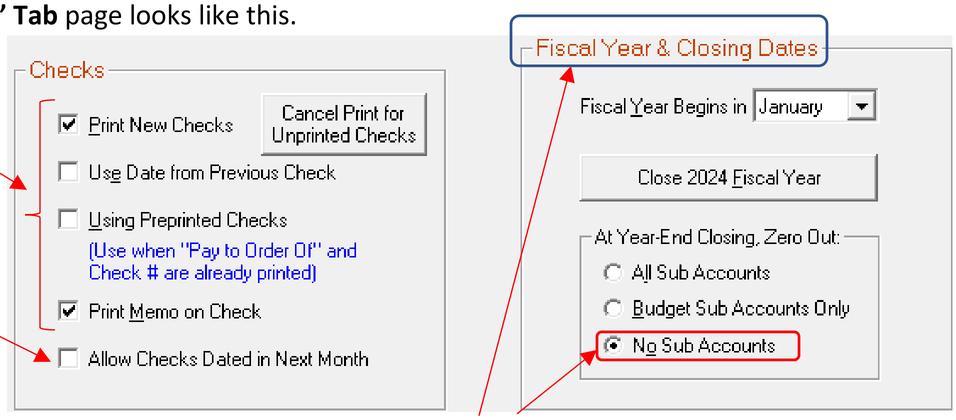
“Allow Transfers Between Conference and Local Accounts:” *(Used in Tutorials #8180, 6062)*

“Show Print Setup Before Printing:” *(Tutorial 7190)*

“Require Check Numbers for Contributions:” Important when you need to “Void” a check or deal with an NSF check. *(Used in Tutorials #7290, 7170)*

The rest are not mentioned in tutorials and are subject to your preference.

Tab #2: The bottom half of the **"General" Tab** page looks like this.

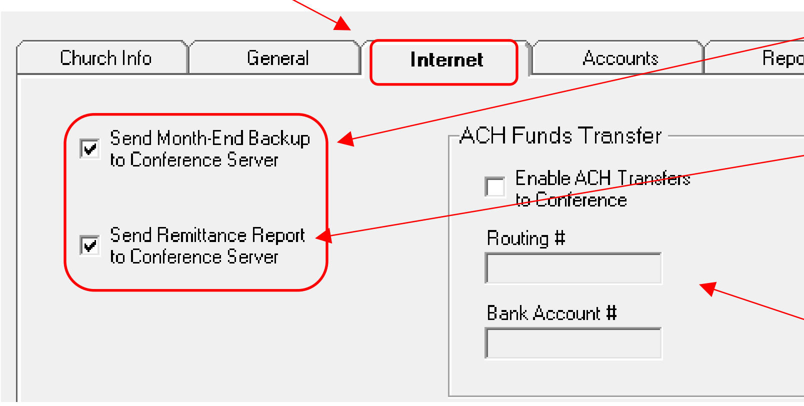


The left side is mostly related to **the type of checks your church uses.** *(Tutorial #7040)*

"Allow Checks Dated in Next Month" is explained in *Tutorial #7050.*

The right side **"Fiscal Year and Closing Dates"** is probably already set the way it should be for your church. Most Fiscal Years begin in January, unless a school is connected to the church, and we recommend that **"No Sub Accounts"** be clicked, so that any "Year-End Zeroing Out" is done manually (*Tutorial #8220)*, making sure that Trust Funds can be protected. *(Tutorials #6630, 6640)*

Tab #3: The "Internet" tab has two very important checkmarks that should always remain checked.

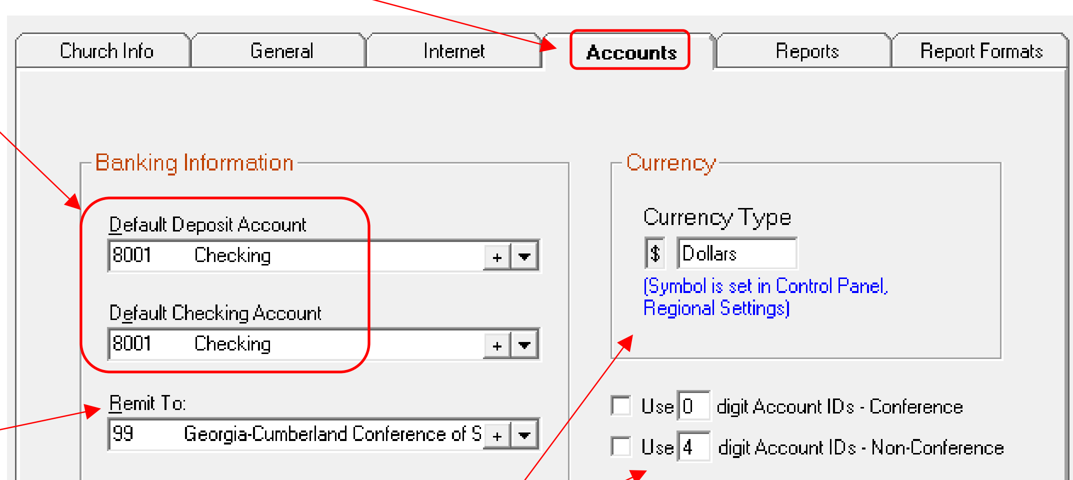


1) So that the conference receives a report of your remittance details.

2) So that your database is safely backed up in case of catastrophic loss at your house or church.

The "ACH Funds Transfer" section is where the Routing and Bank Account number of your church checking account is entered to facilitate electronic withdrawal of the monthly Remittance Check. You're Conference may or may not be using this.

Tab #4: The left side of the top half of the **"Accounts" tab** sets the defaults for Deposits and Checks as they are entered.

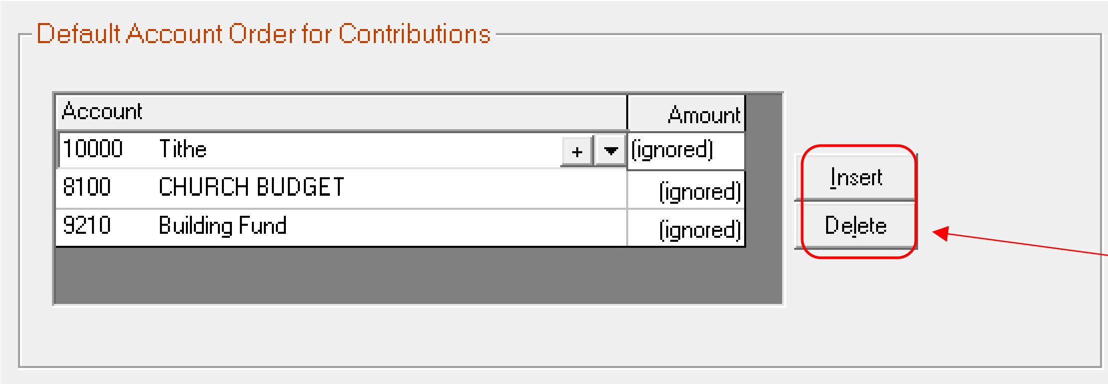


These defaults can be temporarily changed when entering Debit purchases *(Page 6 of Tutorial #4560)* or will need to be changed when a new bank account is set up, or there is a transition to a new bank or checking account. *(Tutorial #8010)*

The "Remit To" line, however, will stay the same.

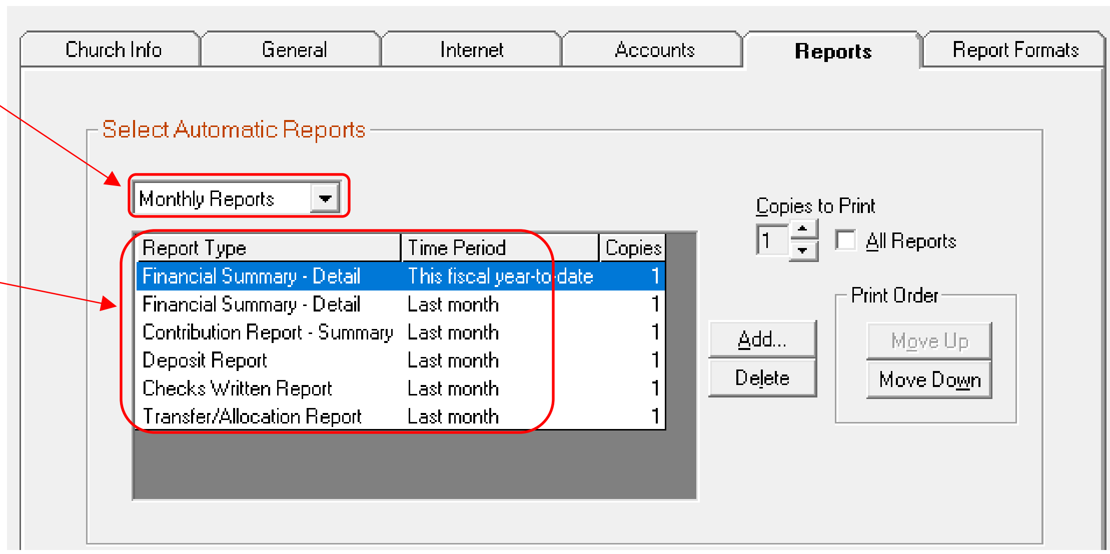
The Currency Type is Dollars and the Account ID settings can stay as they are in your database.

The bottom half of the **"Accounts"** tab has a "Default Account Order for Contributions" section.



This helps with faster data entry, so the most common donations you receive appear automatically as you enter each line. You can adjust them if you wish, using the "Insert" and "Delete" buttons.

Tab #5: The top half of the **"Reports" tab** deals with which reports are printed.

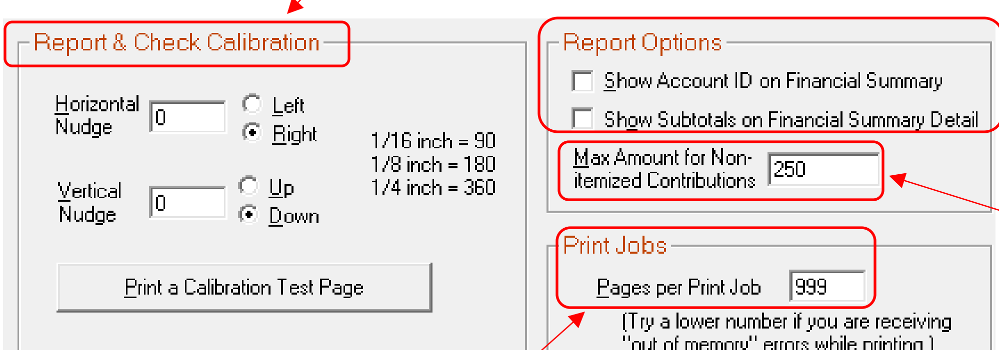


"Monthly Reports" are the default, but Fiscal Year and Calendar Year Reports are available.

This list contains the monthly reports that we recommend giving to the board.

You can play with it if you want to make changes, but even if your board says they don't want to see so many reports, take one copy of them all to the meeting so if a question arises, they will be available to examine.

If Jewel is printing your checks and you have trouble with the calibration, this is where you will make changes.



These "Report Options" will change the look and spacing of the Financial Summary. You can use them if you wish.

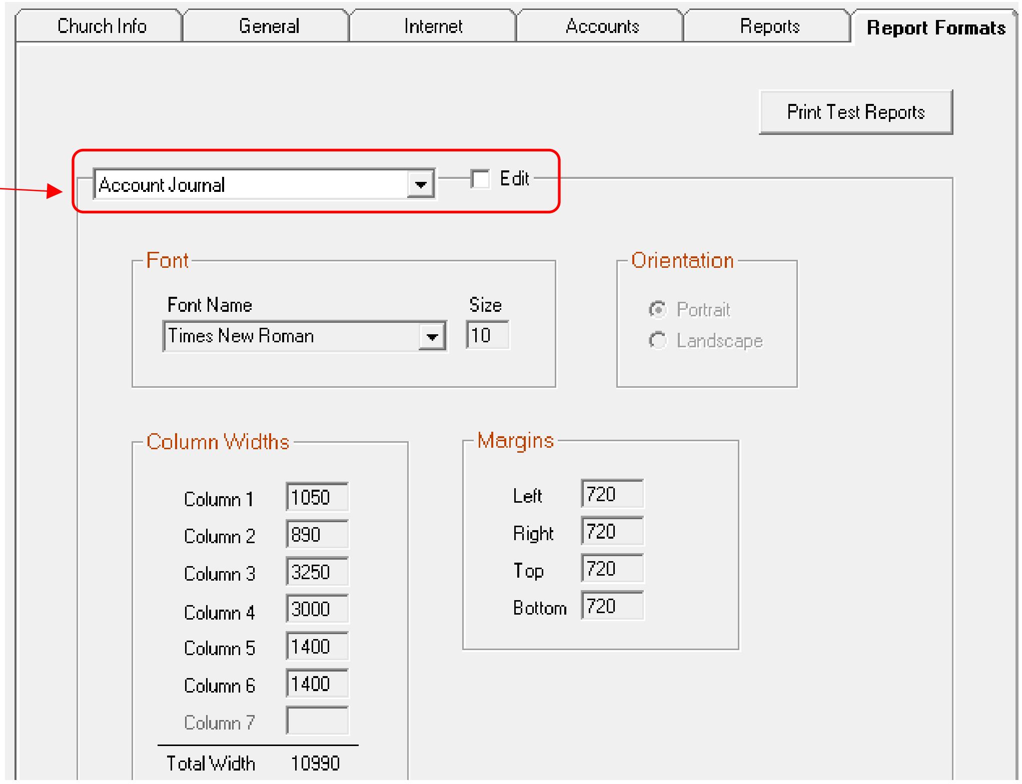
This can be left as is.

If you have trouble printing receipts, this number can be adjusted. *(See Tutorial #7080 for instructions.)*

Tab #6 is **"Report Formats"** and is about column widths for the various reports. Unless you have a lot of patience and paper and toner and have a real problem with a report, it is probably best to leave them the way they are. (the voice of experience!)

If you choose to change one, make sure you take a picture of it or write down the numbers before you start, in case you need to put it back.

Change the report you are working on here. And be sure to click "Edit."



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

This information has been brought to you by the Georgia-Cumberland Conference Audit Team
Created by Linda McCabe. Edited 8/31/2025