

Adventist Giving - Managing your Church's Local Offering Categories
The Donation Options Your Donors See on Your AG Donation Page

Before you begin adding or editing offering options, please read this.

NOTE: in the points below

A and B are not optional. They are Adventist Giving operating policies.

C and D are important because they will facilitate offering entry and mapping accuracy.

E and F are recommendations that will help with clarity, accuracy and simplicity.

- A. Your church's Adventist Giving "envelope" options should only contain local offering choices. No tithe, or Conference Ministries, or ADRA. Those options are available to your donors in other sections of Adventist Giving. This is for your local church offerings only.
- B. Adventist Giving is to be used only for donations. Things like Pathfinder dues, transfers of funds from one church to another, event payments, rental payments or school tuition payments are not allowed. Only donations.
- C. Only local funds that already exist in Jewel should be entered here, using the same name as is in Jewel. You will be mapping these accounts to your Jewel local accounts, so each one should have a Jewel equivalent.
- D. The "Donation Code" should match the Jewel "Account ID" of each Local Fund, making mapping easier and more accurate. You will find your Local Fund list under "Maintenance/Edit Accounts" in Jewel.
- E. There is no need to enter all of your Local Funds into Adventist Giving. Start with a few of the ones that are most commonly used, plus Church Budget. If your board requests that more funds be added later, it is easy to do.
- F. No abbreviations please. Anyone from anywhere can look at your envelope and donate to your church. Just because your board knows what C.S.I.P. means, doesn't mean that anyone else will. Make it plain! And a short description can add to the clarity as well.

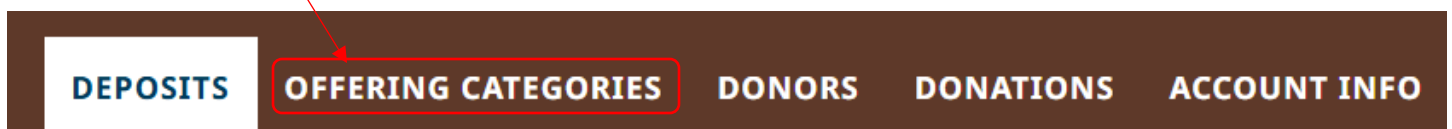
Here are the steps to manage your church's local offering categories.



1) Sign in to your Adventist giving account (Tutorial #3020) and click on "Treasurer Portal."

This will take you to the screen where you can manage the list of local church offering choices that have been set up, maybe by a previous treasurer.

2) Click on the "Offering Categories" tab that is underneath the name of your church.



LOCAL
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Search Local categories

ADD NEW CATEGORY

To set up a new local fund in Adventist Giving, one that you already have in Jewel:

3) Click on “Add New Category,” at the top of the already existing categories.

Add Offering Category

Category Name*

Donation Code*

We encourage you to use a 5-digit number between 80000-89999

Description

ADD OFFERING CATEGORY

4) A new box will appear, where you will enter:

A – The “Category Name” exactly as it is in Jewel. Example: Church Budget or Community Services.

B - The “Donation Code” should match the “ID” number of that exact local fund on the Jewel Maintenance/Edit Accounts screen. Find it in Jewel before you come here to set it up. Most of you will be using a 4-digit code, typical here in GCC. That is fine.

C - This “Description” will be visible to your donors, if you wish to add one. Not absolutely necessary unless it would add clarity.

Once you have entered everything, click on “Add Offering Category.”

Important! If you need a new fund, don't edit an existing fund. Create an entirely new one.

If you need to edit an offering option, such as correcting a donation code or inactivating an offering that goes against Adventist Giving policy or is no longer being used, here are instructions.

	CATEGORY NAME	DONATION CODE	ACTIVE	FEATURED	
↕	Church Budget	8400	☒	☐	📅 ✎ 🗑
↕	Maintenance - Building and Grounds	8580	☒	☐	📅 ✎ 🗑
↕	Community Services	8820	☒	☐	📅 ✎ 🗑
↕	Local Evangelism	9120	☒	☐	📅 ✎ 🗑
↕	Building Funds	9302	☒	☐	📅 ✎ 🗑

5) To edit an offering option, find and click on its little pencil icon.

The “Edit Offering Category” box will appear and you can edit anything in it.

Once you are done editing, make sure you click on “Save Offering Category” to leave.

There are a few other things you can do while on this page.

- Having the correct “Donation code” numbers (the same as your Jewel ID numbers) entered here will make mapping a breeze. Take time to edit them if they are outdated.
- The trash can icons on the right side are the delete buttons. However, just as in Jewel, once someone has donated to an offering account, it can no longer be deleted. If the trash can is red, no donations have been made, so it can be deleted. Once someone has donated, the trash can turns gray and the “Category” will need to be inactivated if you want to make it invisible to your donors.
- The pencil icon is the “edit” button. You must click on it if you want to make changes.

	CATEGORY NAME	DONATION CODE	ACTIVE	FEATURED			
↕	Church Budget	8400	☒	☒			
↕	Maintenance - Building and Grounds	8580	☒	☒			
↕	Community Services	8820	☒	☒			
↕	Local Evangelism	9120	☒	☒			
↕	Building Funds	9302	☒	☐			

- You can rearrange the order of your offering choices by dragging and dropping them, using the up/down arrow.
- You can inactivate offerings by clicking on their “Active” button. For example, when a project is finished and you are no longer collecting offerings for it, click to remove the check from the box. This will remove it from your donor’s Adventist Giving options.
- If you need to re-activate a fund, click again on its “Active” button to make it reappear to your donors.
- The “Featured” accounts are displayed to your donors when they choose your church in Adventist Giving. Since only 10 can fit on the front of the envelope, choose carefully which ones to display. The rest will be there, but won’t be as readily available.

6) After you are finished with your edits or entries, you must scroll down and click on “Save Changes.” If you don’t take this step, everything you did will be lost. You can “Save Changes” at intervals through the process, just to make sure you don’t lose anything.

Keeping your local envelope choices clean and clear will keep your donors happy and your donation receipts accurate. Clarity, accuracy and simplicity are always worth the effort!

For more tutorials on ADVENTIST GIVING, see section 3000 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 8/22/2025*