Just remember: http://www.shelbyhelp.com

==Step-by-Step instructions on working with Project Codes. I will also show you the NEW Project Register feature that is now available in version 5.4.1990 +==

DID YOU KNOW: Project Registry Reports can now span multiple years and/or multiple companies.

How is a Project Code used?

Projects can be linked to invoices, journal entries, contributions, and payroll, in order to link event (projects) amounts together. For instance, you have senior adult ministry that is collecting money for different trips that are planned. You would have to setup different accounts in general ledger in order to track all the money coming in separately for each trip or you can use projects to do this. A Project is similar to job cost or job class in other programs. There are two ways to use this feature:

1. You have **ONE ACCOUNT in General Ledger** called Senior Adult Missions. You can use multiple Project Codes to track all the different trips that we have collected money for (example: Branson MO trip, Hawaii Missions trip, Bahama Missions trip – Yeah, I want to go too). You can then run a "Project Register" for each trip or run it for all the projects trips that pertain to Senior Adult Ministry. (Examples below)
2. You have ==**MULTIPLE ACCOUNTS in General Ledger**== that you want to tie back together based on ONE event (project). The example is going to be Christmas Musical. Lets say you have different General Ledger expense accounts that you are going to use to pay for the event (project) and you have an income account that you are going to use to collect the money for the Christmas Musical. The problem is you use the accounts for other activities besides the Christmas Musical that's where the project comes into play. You can pay the invoices and link to the Christmas Musical project and even within the same invoice you can choose to link to the project on one line and then not link on the next line. (Examples below)

Step 1. To setup a project: Choose Utility, Project Information (Within most financial options you will be able to setup projects)
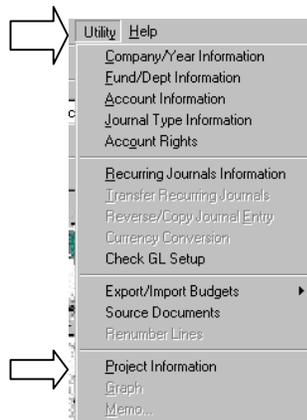
Step 2. Within Project Information: Choose the NEW Icon to create projects. The system will number the projects. Tip: you can keep all the projects together by using the same prefix within description. (Ex. SA=Senior Adult so the description will be SA Hawii Missions Trip.)
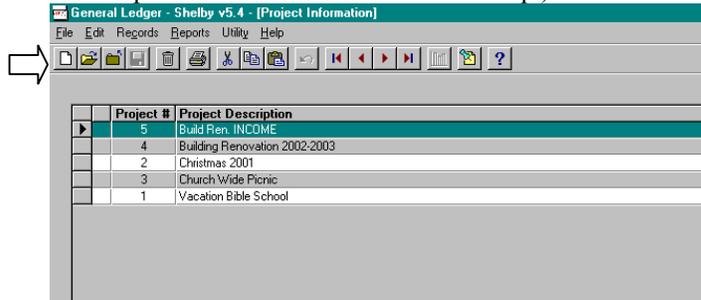
Step 3. Within Project Entry: Type your project name. (remember Step 2 example SA=Senior Adult)
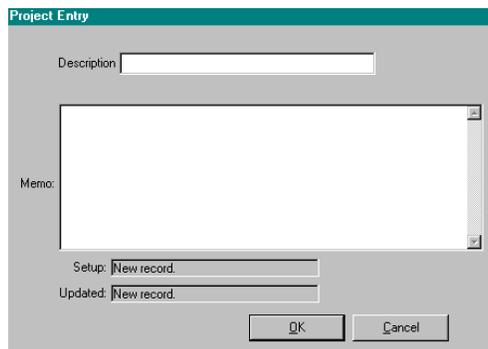
Step 4. Below you will see different screens that you can use to link a project. (Tip: you can either search for the project by clicking on the arrow within the project box or pressing F4 on the keyboard or just type the project number that was assigned, to save time)

General Ledger Journal Entries
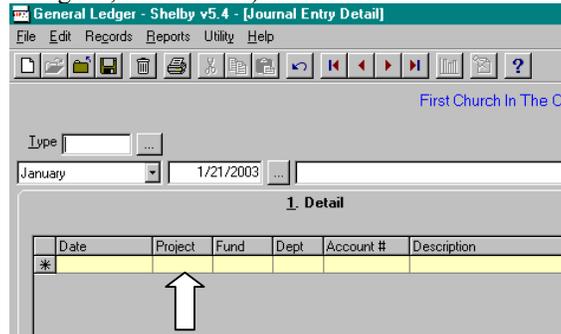
Contributions Purpose information within CN Utility
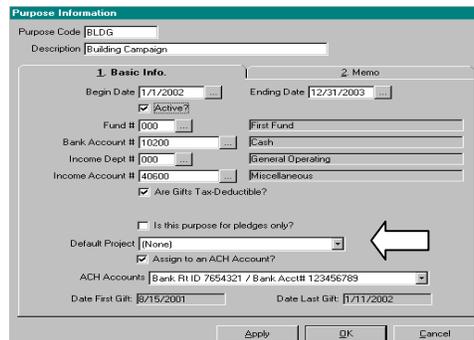
Contributions Entry, Choose Preference, Choose Projects to allow the project field to show on the entry screen

You now have a project field on the entry screen

AP or AR you have an option to link to a project to an invoice NOTE: you will use this a lot within AP

Payroll – Employee Information Compensation Tab

Step 5. To run the NEW Register: Choose General Ledger, Utility, Project Information, Reports, Register
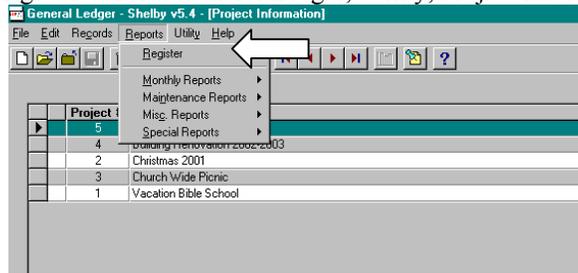
Step 6. Within the Project Register you can choose the Include/Exclude button to select the projects you want. (Samples on next graphic) You can choose date ranges from and to. (Remember this feature will allow you to choose multiple years.) You can choose multiple companies. You can sort it in journal date or journal account number.
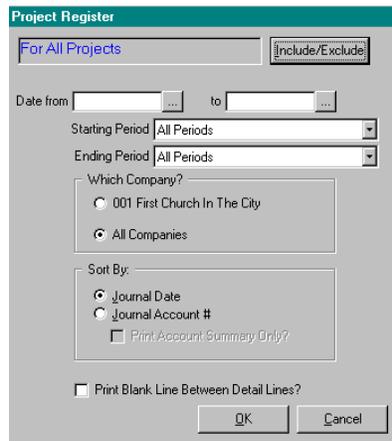
Include/Exclude Button. You can select different projects
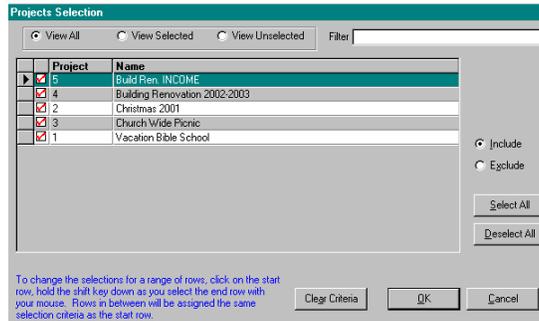
Step 7. This is the ending report layout.

We will try to bring you new features every other week so please check back. Please email me your suggestions and comments. Let me know if these tips are helping.

Remember: **www.shelbyhelp.com**