

Edit Names – and When Not To Want to Clean Up Your Donor's Name List?

Some have noticed duplicate donors in their receipts as they have closed the year, and have mentioned a desire to simplify their "Names" list in Jewel.

I am all for keeping the Names list up to date and accurate, but cleaning it up is a bit more complicated than just matching and combining. The "Combine Names" feature in Jewel works really well, but there are things you need to know before you start.

For one, the **Names List** (Find it at Home Page/Maintenance/Edit Names) **contains your Vendor names as well as your Donor names.** Vendor names are the names of people and businesses that have appeared the payee line of the checks you have written. Jewel keeps them separate, even though they are in the same list, by marking them as a "Vender" rather than a "Donor." To see the difference:

- Go to Home Page/Maintenance/Edit Names
- Click on a particular name
- Look at the bottom of the middle column and see the box that has both "Vendor" and "Donor" in it
- If a name was first entered into Jewel when you wrote a check, the "Vendor" box will be checked.
- If it was first entered when you recorded a donation, the "Donor" box will be checked.

Let's talk about the donors first. **Donor names can never be deleted from Jewel. Ever.** If you were to delete a donor, it would delete their offerings, which would change your deposits from past years, which would make a HUGE MESS! So Jewel doesn't let you do it. But you can hide names. Read down to the bottom to find out how.

Donor's names should always show up with the last name first. And if they are entered into Jewel correctly, they will.

And there are reasons to have some duplicates

- A family turns in a tithe envelope that says "Mr. and Mrs. Sam White." You should enter it in Jewel just that way. "White" in the last name line. "Mr and Mrs Sam" in the first name line. If after they have been coming awhile and you learn their names are Sam and Jennie, you can edit it to say "White, Sam and Jennie" if you wish. *And any combination of "Sam and Jennie," "Mr and Mrs," offerings can be posted to that donor name.*
- **But**, let's say one day on the tithe envelope, the name is just "Sam White." Then *you should create a new donor name – "White, Sam."*
- Then sometime on an envelope, Jennie enters it as "Jennie White." *You should create a new donor name – "White, Jennie."*

Edit Names

Donor Info ☐ Edit "McCabe"

ID (100 or above is recommended)

Name: L, F

First Name

Last Name

Address

Memo

Cell Phone

Home Phone

Work Phone

Email

☒ Get Receipt

☒ Donor
☐ Vendor

AdventistGiving Name

Why not combine them all into one happy family?

- Because sometimes couples file their taxes separately from separate incomes and do not want them combined.
- Sometimes they are not a happy family and are headed for divorce and they want to start separating their offerings out before they actually split.

At times, I have had to go into a database and separate a couple's finances for that reason. Not saying that every couple that gives separately is in trouble, but the rule is: **Enter the name how the donor writes it. Together if the donor put it together. Separately if the donor wrote it separately.**

At the end of the year, you might hand them three separate receipts (a "Sam and Jennie", a "Sam" and a "Jennie") but that is not a problem for them. If they file jointly, they just use the total. If they ask why, tell them that is the way you have been taught to do it. If they want them all together, tell them to always use both names on their envelopes.

NOTE: Adventist Giving is a bit more complicated. See sample AG donation below.

There are three lines with donor information. Name, For, and Paid By. And they may all be different.

OFFERINGS:

Name: (anonymous)	
Address: (incomplete address)	
Code	Description
8100	Church Budget

For: (anonymous)

Paid by: (anonymous) on 02/03/2022 07:47:51 PM EST

Transaction ID: 8691149; Transaction Status: captured

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And to further complicate it, some donors have multiple ways of entering their info.

Jewel uses the "Paid by" line when giving you the donor name, because that is the most consistently correct name, but that may say "Paul Smith" because of the Credit Card info, and the "Name" line may say "Paul and Judy Smith" which is what they want on their receipt. It is a good idea to look at the printed copy of the AG deposit report when mapping a new donor name in Jewel, to see what the "Name" line says and then use your judgment on how to map.

What to do in cases of 1) marriage, 2) remarriage, 3) divorce or 4) death?

The principle is this: Do not change history by editing existing names. Create new names.

- When someone gets married, do not click "Edit" and add the new wife's name to the husband's name in Jewel. John Smith should not be edited to be John and Mary Smith. Keep John Smith. Create a new name for John and Mary Smith if they begin donating together. Don't edit/change Mary Jones (maiden name) to Mary Smith. Keep Mary Jones as is, for the historic record. Create Mary Smith as a new donor if she donates under that name.
- Same principle with remarriage. If they donate as a new Mr and Mrs, create a new name and post the donation to it. Don't change history by changing an existing name.
- When a divorce occurs, do not just remove one spouse's name from the couple's donor name. Stop using the couple's donor name. Create individual donor names for each of them, if you don't already have them.

- When a spouse dies, you can use the joint couple name for the rest of the calendar year, since for tax purposes, they can file jointly for that year. Then create a new donation name in January for the surviving spouse. Do not just edit the couple's donor name and take the deceased spouse's name off of it. Otherwise you are erasing him/her from the entire donor history.

Remember, you are changing history when you edit a name. Do it carefully.

Consistency and attention to detail is really important in your Donor list. Last name first. Spelling correct. Capitalize the first letter of each name. If the check or the envelope has an address, double check to see if you have it entered into Jewel. Sometimes people move. Ask them which is the correct address if you see a new one. Adventist Giving donations usually have an address and I always look to make sure it is the same as the one I have already in Jewel when mapping a new name. You will be glad you did when receipt time comes.

If you are entering a Donor that you know is in the system but Jewel says they are not, take the time to stop, go to the donor list (The little plus sign on the donor name line when you enter offerings will take you to the "Edit Names" page where you can add or edit names) and figure out what is going on. ***Don't just say "Oh well!" and enter it again.*** That is how duplicates happen. You may be spelling it incorrectly, or it may have been spelled incorrectly the first time. Take time to do it right and your receipts will have fewer duplicates.

The only reason to combine two names is if there are two "Jennie Whites" that are the same person and both are checked as just donors. Just accidentally two of them. Maybe a misspelling or a punctuation mark -- just enough difference to make Jewel think they were not the same person. Then you can combine them.

But ***don't combine a Vendor and a Donor just to clean up the list.***

How to combine two names if you decide to:

- Find the two names you want to combine. Note their account numbers.
- Click first on the one you want to delete.
- Click on "Combine Names."
- Enter the account number of the one you are wanting to save.
- Once you are sure that you have the correct names in those two boxes, click on OK.
- Jewel will ask you once more if you are sure. Say yes.

Ok, let's talk about the Vendor names. **A name can be designated as a Donor and as a Vendor**, if you check both the Donor and the Vendor boxes under that name. (Like when White, Sam is a Donor but you also write reimbursement checks to him) But when you write a check to a person, it is usually first name first. Whereas the Donor names are last name first. So if you combine donor and vendor names, you will have to write checks to "White, Sam" which is a bit odd.

Because of this, **most treasurers prefer to have separate names for donors and vendors.** "White, Sam" as a donor and "Sam White" as a Vendor.

Consistency is also really important in Vendor names when writing checks. If you write checks to "White, Sam", "Samuel White" "Mr Sam White" and "Sam White", then it will be harder to check to see if he is a 1099 candidate. And if you need to search for a check that you wrote Sam and you search alphabetical by payee, you will have to look in multiple places on the report. Be careful. **Decide what name to use and use it every time.**

Another one that I see a lot, is **multiple spellings of various business names.** Example: Adventist Book Center. I have seen ABC, Georgia Cumberland ABC, Adventist Book Center, SDAABC etc. Sometimes all in the same church list! And they are using all of them! This makes it difficult to track your payments.

To be fair, **a lot of this happens when new treasurers take over.** They start to write a check, but they enter the name differently than the last treasurer, so Jewel tells them it is a new name so they just say ok. If you are a new treasurer, familiarize yourself with the Check Report from the previous year. If it is a bill that is paid regularly, see how it was entered. Use the same Vendor that has been used in the past.

And Conference names? Wow! I have seen them with all kinds of capitalizations and spellings and abbreviations! Some churches have had 4 or 5 or 6 different versions. ***C'mon, treasurers, you know it's in there, so if you start typing the name of your Conference.....and Jewel says it is new and needs to be added, back up and start over! Don't just add more and more creative spellings! 😊***

There are times when combining is necessary. And it is a very useful tool. But use it sparingly and use it wisely.

Also, it is a good idea to “Send to Auditor” before you set out to make changes to your “Names” list. It is like a Mulligan in golf. If you get yourself backed into a corner and need rescued, contact me and I can restore you to where you were before you started.

And another idea would be to go to Reports and Graphs/Names and print off your entire names list as a reference. That way you have a hard copy if you need to fix just a few names back to the way they were.

One other feature to use carefully, is the “Edit Active Status” button. *If you inactivate a name, it is still in Jewel, but is hidden.* Click on the “Edit Active Status” button on the “Edit Names” page, and you can unclick the names that you want to hide. People who have been gone for a long time, one time visitors etc. It means that you won't have to scroll through so many names when entering offerings, so it is useful. Remember though, you cannot print a receipt from an inactive name, so don't unclick people who have donated in the last year or so. Use sparingly and carefully. Like, moved-away-a-long-time-ago or-are-deceased sparingly.

So, have I scared you enough to make you decide not to touch your names list? I hope not. But have I made you cautious? I hope so!

If you don't understand what I have said here, best not wade into it. But if you understand it and are careful, it can be helpful.

Corresponding video: 2.3 – Accuracy in Posting and Dating. Find at <https://www.gccsda.com/auditing/10963>

For more JEWEL BASIC PROGRAM 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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