

**\*\*Please Note:** the Email function is not available for Canadian users.

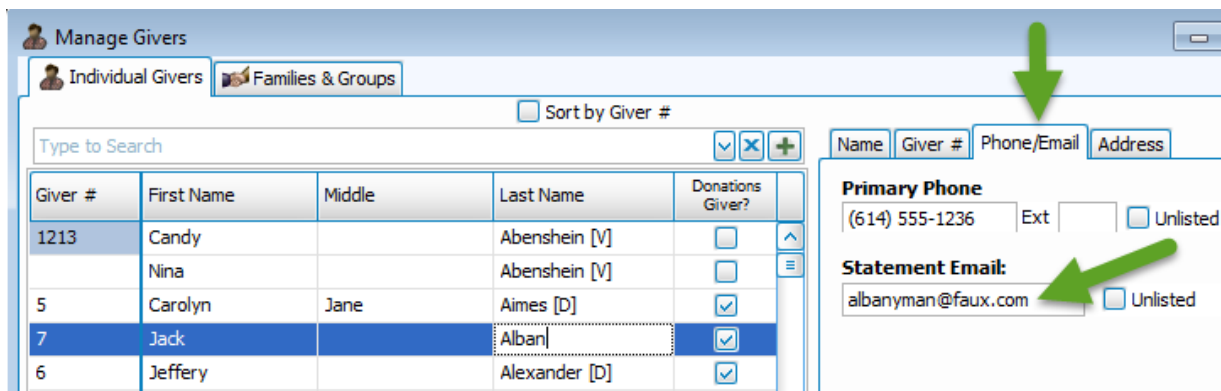
For Donations to have the ability to email statements, individuals must have a valid email address entered into the database. Donations Statements can be emailed to Individuals that are entered through Membership or Donations.

### Individuals entered through Membership:

- If an individual gives alone, the *Donation Statement* will be sent to the email address on their Individual record.
- If you have individuals in a family that are checked *Gives with Family'* the *Donation Statement* will be sent to the email address of the *Primary* person in the Family only. This is the individual with the *Directory/Report Order* of 1.

### Givers entered through Donations:

- The email address is added through *Manage Givers*.
- Go to *Donations > Manage Givers*. Highlight the Individual. Click on *Phone/Email* tab and add the email address.



Giver #	First Name	Middle	Last Name	Donations Giver?
1213	Candy		Abenshein [V]	<input type="checkbox"/>
	Nina		Abenshein [V]	<input type="checkbox"/>
5	Carolyn	Jane	Aimes [D]	<input checked="" type="checkbox"/>
7	Jack		Alban	<input checked="" type="checkbox"/>
6	Jeffery		Alexander [D]	<input checked="" type="checkbox"/>

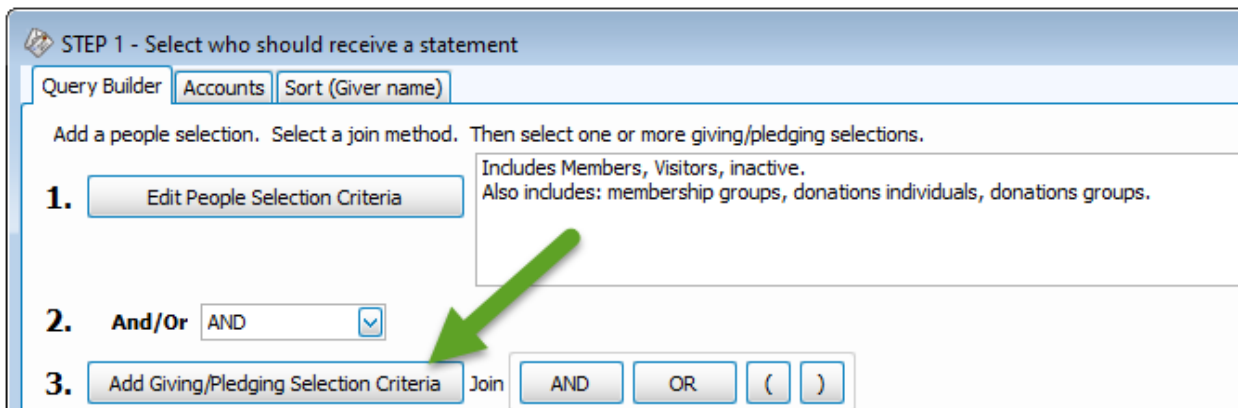
**Primary Phone**  
(614) 555-1236 Ext   Unlisted

**Statement Email:**  
albanyman@faux.com  Unlisted

**All Donation Statements are attached to the email as a PDF**

Go to *Donations > Donation Statement > STEP 1 - Select who should receive a statement*

Choose #3 *Add Giving/Pledging Selection Criteria*.



STEP 1 - Select who should receive a statement

Query Builder Accounts Sort (Giver name)

Add a people selection. Select a join method. Then select one or more giving/pledging selections.

1. Edit People Selection Criteria  
Includes Members, Visitors, inactive.  
Also includes: membership groups, donations individuals, donations groups.

2. And/Or AND

3. Add Giving/Pledging Selection Criteria Join AND OR ( )

**Typical criteria:** choose *Only those who gave*, under *Giving - Include*. Choose *All*, under *Pledging - Include*.

**Enter Date Range:** Select the Date Range you need for your statements. Click *Add & Next*.

**STEP 2 - Select the statement layout. Select email or print for each giver.**

**Statement Layout:** There are several statement layouts available or you can design a layout of your own, by clicking the *Statement Designer* tab. Once the *Report Designer* screen opens, press the F1 key on your keyboard to open the *Help* topic on designing a statement.

**Global Memo:** Is a message to all Givers on their Statements. A new message may be added by clicking on the icon that looks like a sheet of paper with writing on it. A previously entered message may be selected from the dropdown.

**Email Column:** Will have a checkbox by the Giver's name to indicate an email address is on file.

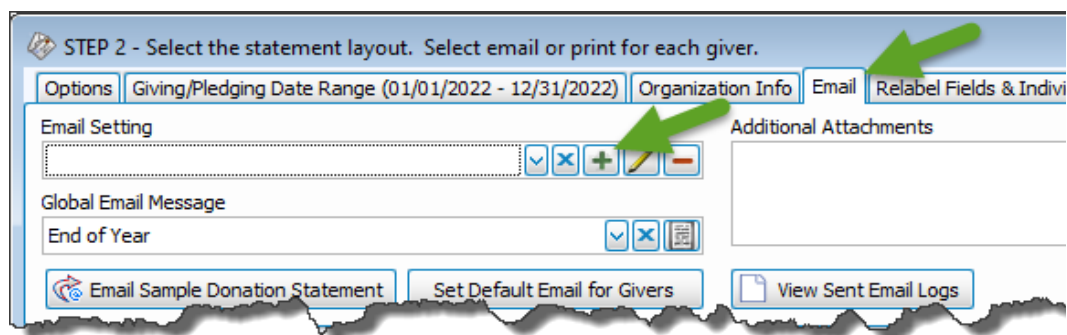
- Those without an email address will have the word **none** in the Email column.
- Those with an invalid email address will have the word **invalid** in the Email column.

**Personalized Email Message:** may be entered to be included on an individual's statement. **Please note:** The Personalized Email Message does not Save.

### Step 2, click on the Email tab. Setting up your Email Settings

To email out of Donations, you have to create a connection between Church Windows and your Email Provider. This is done by entering the required information from your Email Provider. This is not information that Church Windows is able to provide you. This information applies to your specific Email Account. If you have an IT Person or someone that set up your email; they should be able to give you the credentials for your outgoing mail server.

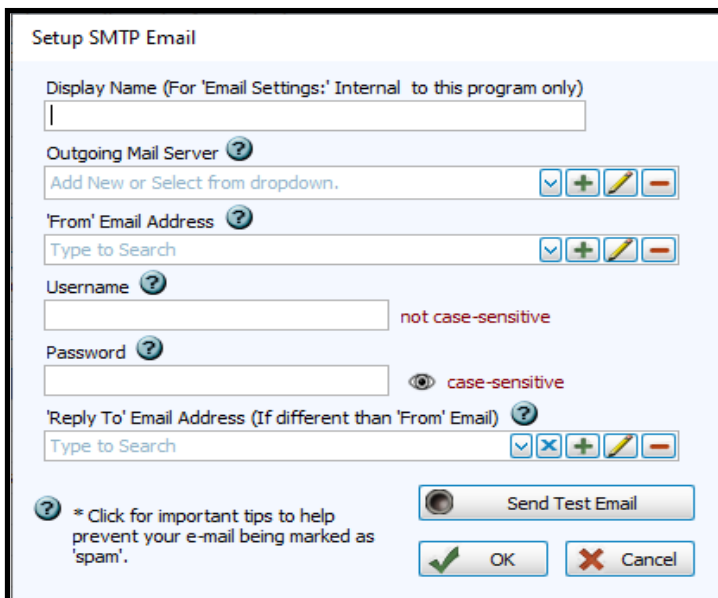
- At the *Email Setting* field, click on the green plus sign +.

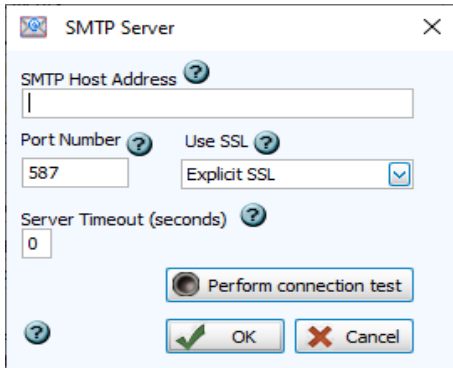


- **Setup SMTP Email** screen opens which is where all the specific Email Provider information is entered and saved.

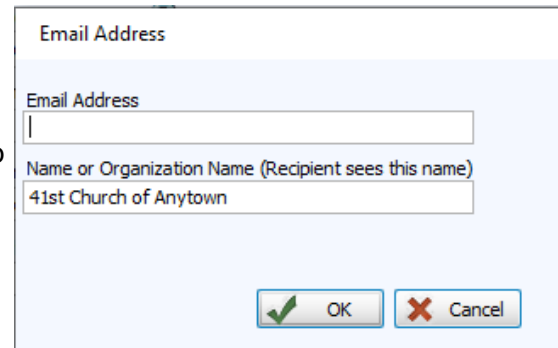
- **Display name (For 'Email Settings:' Internal to this program only):** Email Settings will be held under the name entered in this field. Different groups within the church can be set up with their own Display Name to use different email accounts

- **Outgoing Mail Server (SMTP):** You can select an existing name from the drop-down box. If you have not yet set this up, click the *Green Plus (+) sign* on the right.



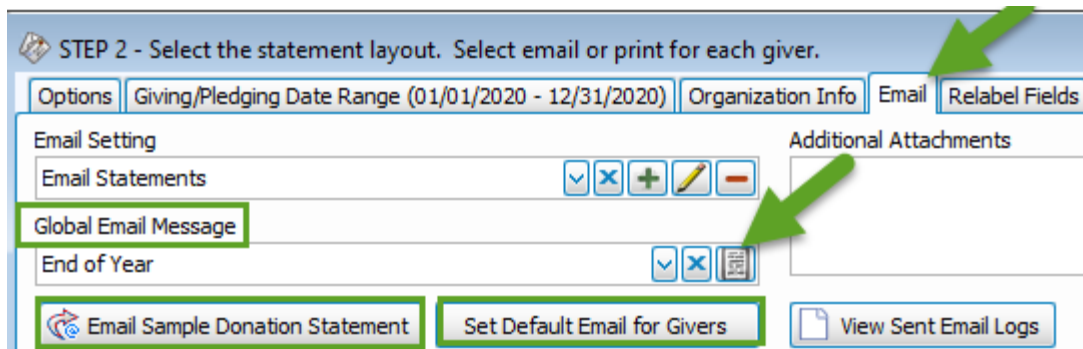


**\*\*Fill in the Host Address, Port Number and SSL then click the Perform Connection Test button. You MUST get a Successful Connection Test to go further. If so, click OK.\*\***



- **'From' Email Address:** You can select an existing email address from the drop-down box. Or if this has not been set up yet, *click the Plus (+) sign* to set up your (or your organization's) email address. This is the address your email will be sent from.
- **Username:** Will be filled in automatically, after the From Email Address is entered.
- **Password:** The password used to access to your Email Account.
- **'Reply To' Email Address (If different than 'From' Email):** This will fill in automatically with the email that you entered as your From Email. If you want to use a different email *Click the Plus (+) sign* to set up a different email address people will use to send a reply.
- **Send Test Email:** Review the information to make sure that all the information appears correct. Then *click the Send Test Email* button. Type an email address that you know you can immediately access. *Click OK* and a message will be sent. Check to see if you received an email message with the subject "TEST Email" from the email address you entered. After receiving the test email, *click the OK* button on the Setup SMTP Email screen to complete the email setup.

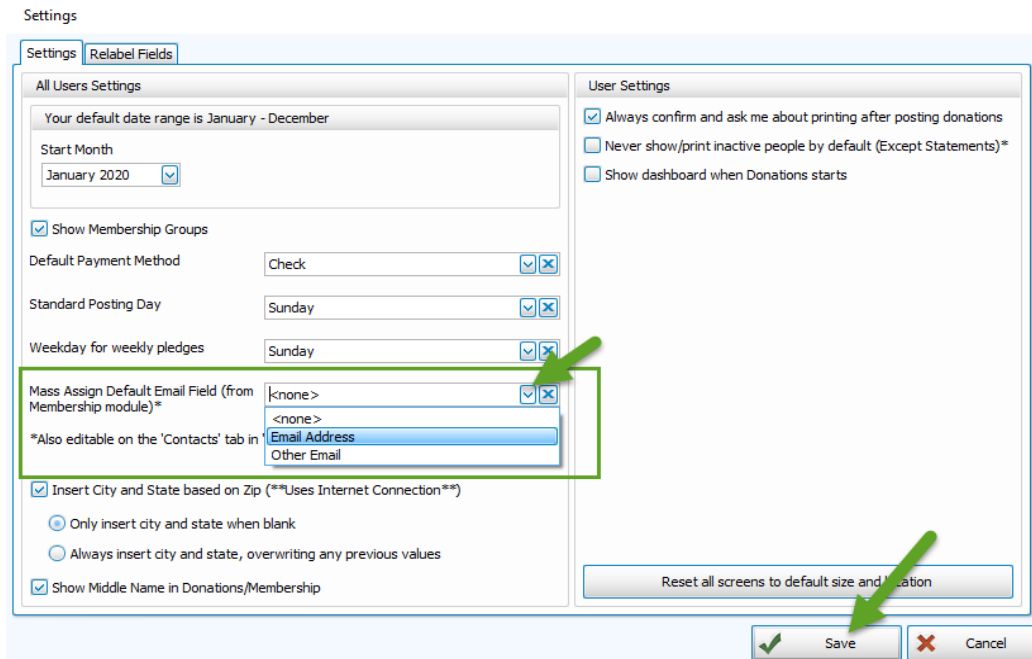
**Global Email Message:** Must be entered when mailing. This adds an Email Subject and Email Message to each email sent. This allows you to set up one or more messages to attach to donation statements. You can use a different message each time you send statements. To add a statement, click on the Icon that looks like a sheet of paper with writing on it.



**Email Sample Donation Statement :** You have the option to send a sample statement. This is done by clicking the *Email Sample Donation Statement* . Enter the email address you want the sample to go to by clicking the green *plus sign*, enter the Email Address (click OK) and click *Send Email*.

## Set Default Email for Givers

- Before emailing you must identify which email address is to be set as the default.
- On the *Settings* screen, at *Mass Assign Default Email* field, click the drop-down arrow to indicate which of the email fields in Membership is to be used for emailing statements. Click Save.



- Click *OK* at *Change all Membership Givers who currently have no default email or '<none>' as their default email to 'Email Address'*

**Change all membership givers who currently have no default email or '<none>' as their default email to 'Email Address'**

OK      Cancel

## To email statements to people with emails and print statements for those who do not have emails, follow the following steps.

- Click the radio button for Email and click the box for *Check Print if no email address*.
- Click *Uncheck "Print" for all*.
- Click *Check 'Email' for all*.

### PLEASE NOTE:

If the system fails to send emails, you may need to increase the Server Timeout (seconds), which is found by clicking on the pencil by the Outgoing Mail Server field.

**Please Note:** your email provider could have extra security/protection for your email account. For example, Google requires the App Password setup and entered in the Password field (see Page 2 Setup STMP Email).

If your provider uses the *Allow Less Secure Apps* setting, make sure this is switched to ON (not supported on Google).