Donations: Statements

Version: v24.22.0

Last Updated: January 2023

800-533-5227

www.churchwindows.com

support@churchwindows.com

Donations: Statements

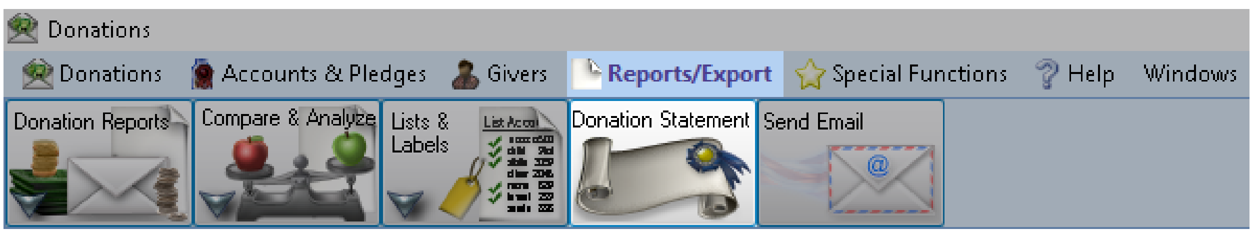
Donation Statements

Donation Statements show a giver's contributions in a given time period. Their giving totals can be broken down by time period, giving accounts, tax deductibility, and show pledge fulfillment progress.

- Sample Default Donation Statement
- **Donation Statement Troubleshooting**

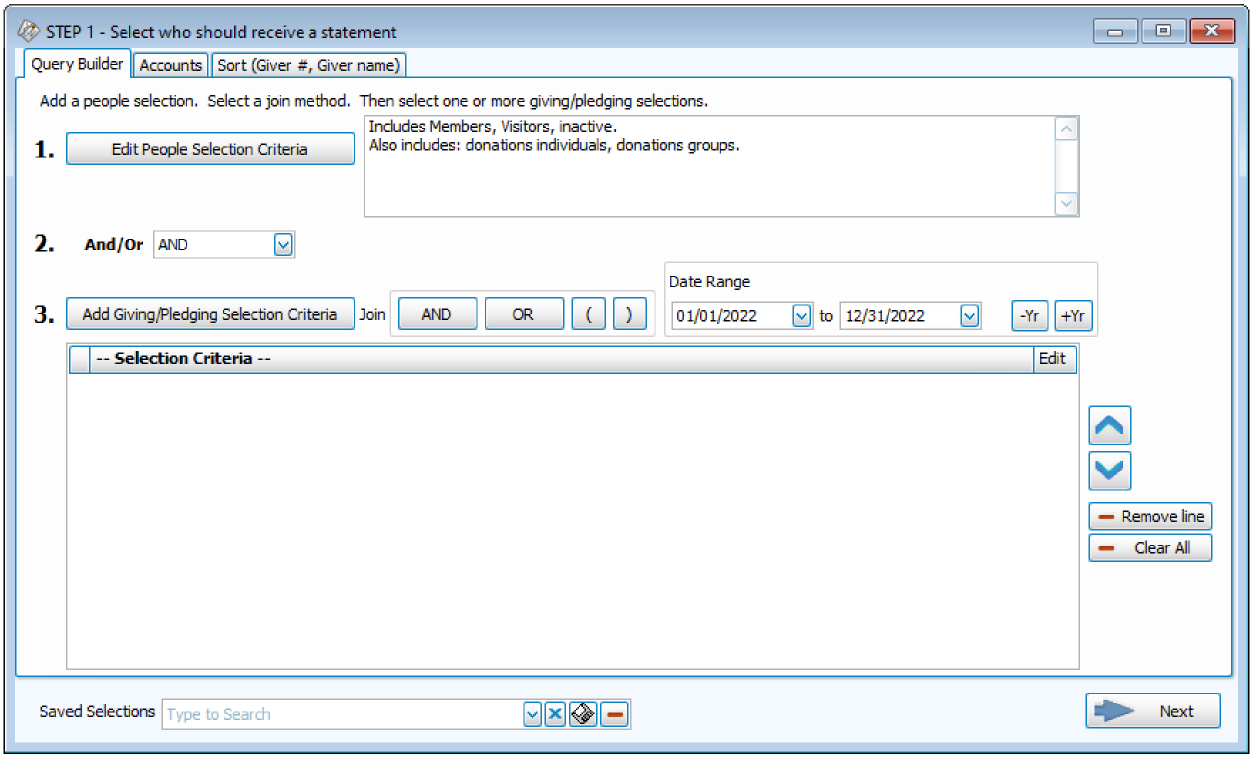
Access Donation Statements

To access from the Button Bar, go to **Reports/Export > Donation Statement**



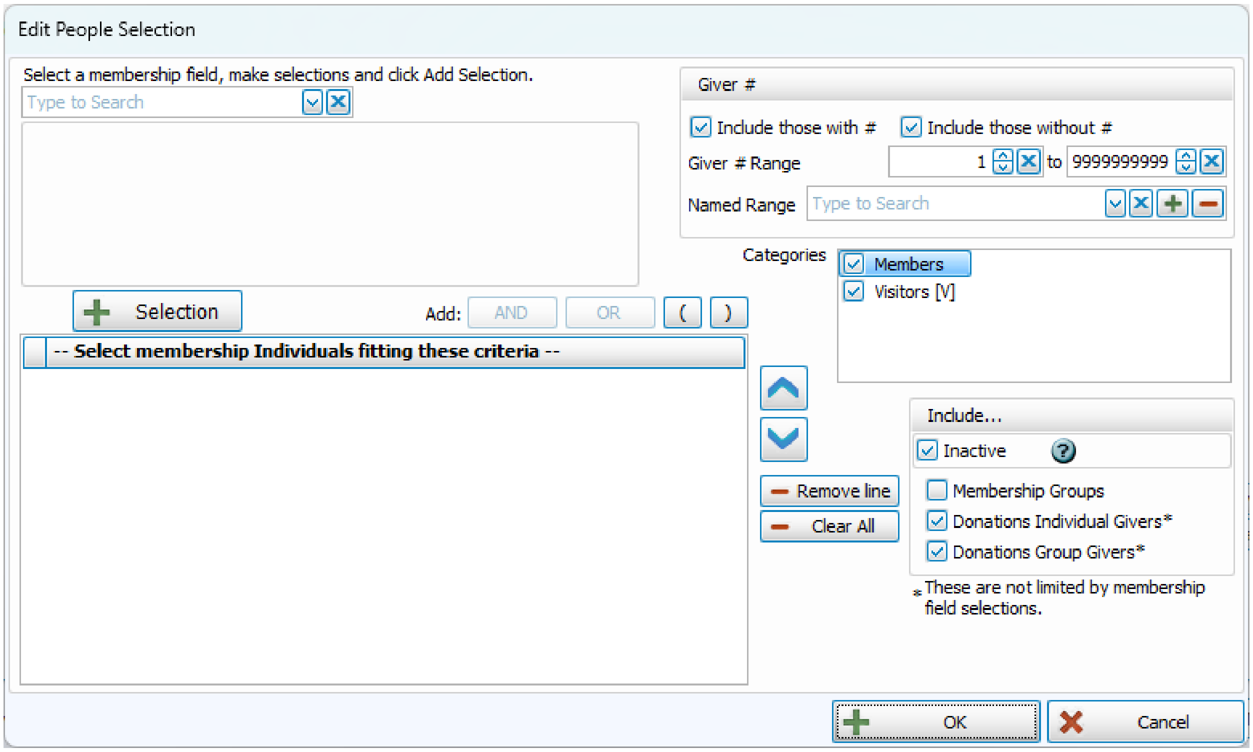
Step 1 - Select Who Should Receive a Statement

Queries are a search in which you define a set of criteria that people in your database must meet in order to be included in the list of donation statements. This tab can filter based on information in People records and can be combined with giving and pledging history from Donations.



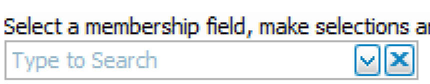
In order to generate a statement for someone, they must meet the criteria in Step 1 and have Receives Statement checked in Manage Givers. The Pledge/Giving Analysis report can produce a report of everyone who has recent giving but does not have Receives Statement checked.

Edit People Selection Criteria



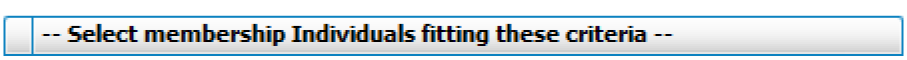
This area allows you to use criteria entered into People records in Membership.

Select Membership Field



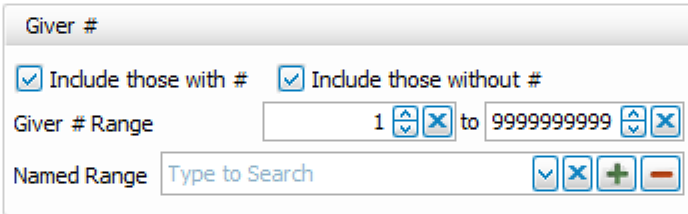
- This drop down allows you to filter statements using criteria in Membership, such as Status Code, Address, or Email.

Click Selection to add criteria to the summary in the lower left.



- Combine multiple pieces of criteria with AND and OR.
- Group conditions with ( ).
- Remove a line of criteria with Remove line and clear all selections with Clear All.

Giver # Criteria

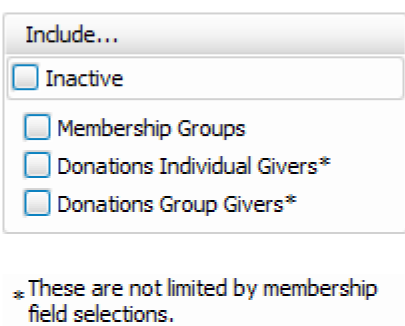


- This section allows you to use Giver #s as a criteria for inclusion. You can set your own range or define custom ranges.

Family Category

- Categories are a part of Family Records. These apply to every family with this designation.

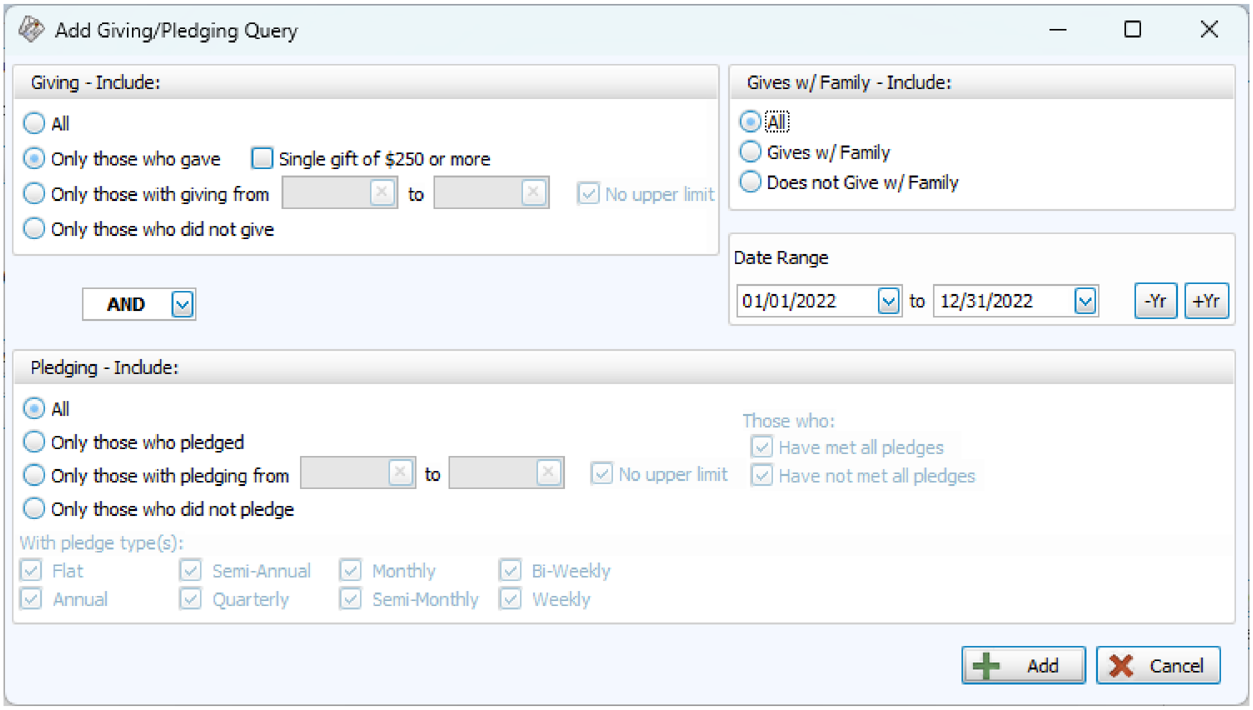
Include Inactive, Groups, and Donations Records



- The **Include...** area allows you to add People records that have been marked inactive. These records are in addition to the criteria added in the left of the screen.
- Include **Membership Groups** to list them along with individuals.

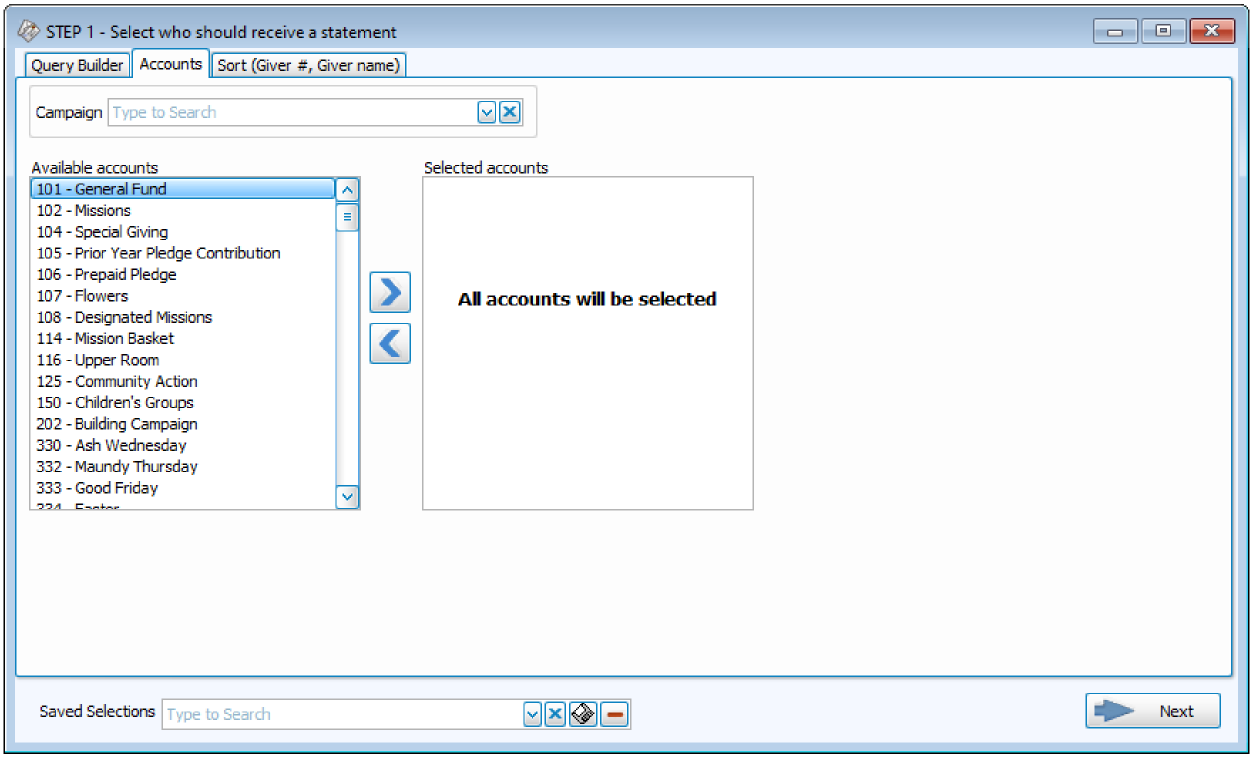
- Include **Donations Individuals** and **Donations Groups**, though as fields in Donations are limited, this will add all Donations records regardless of the criteria on the left of the screen. Giving/Pledging Criteria will still apply.

Giving/Pledging Selection Criteria



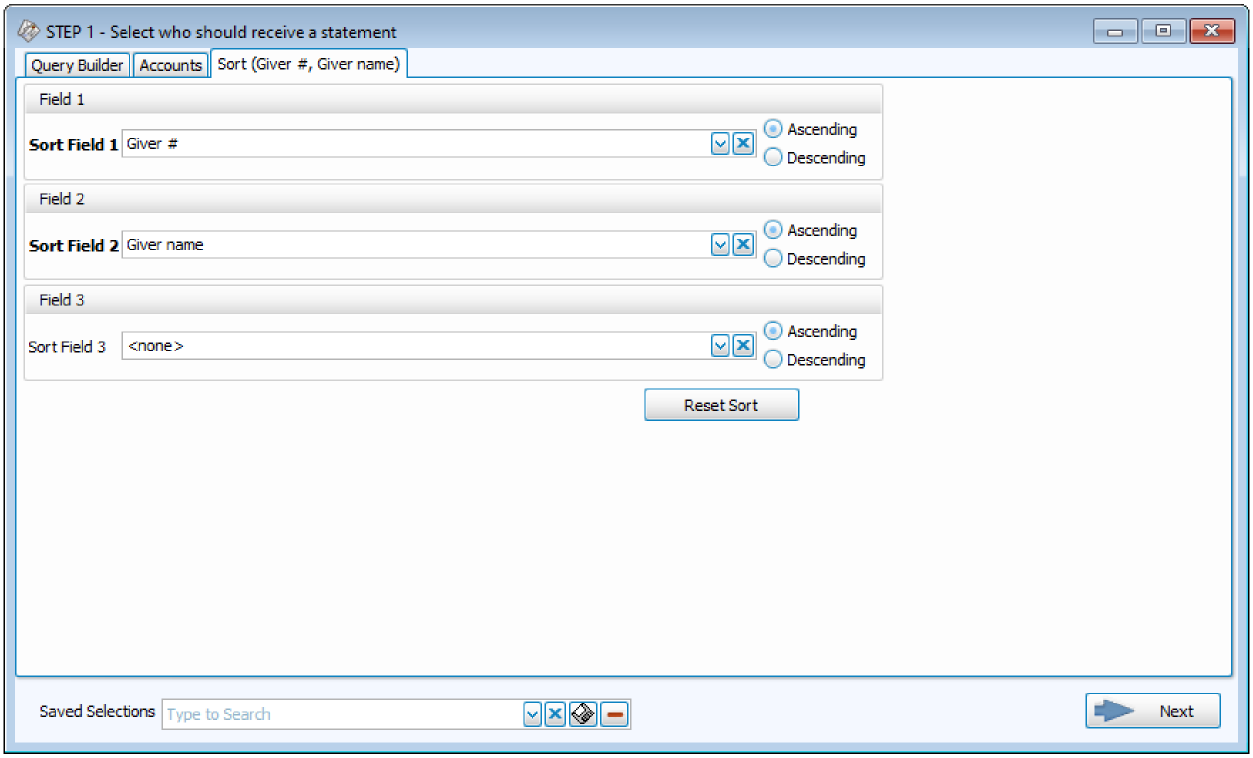
- This area is used to generate a list of people based on their giving and/or pledging history within the indicated date range.
- Use the Rec. Statement and Gives w/ Family boxes in the upper right allow you to filter based on these check boxes in Manage Givers.

Accounts Tab



- Select participants of a specific campaign with the drop down at the top of the window.
- Move columns you want to include to the right, and columns you want to exclude to the left.
- Use the  and  or double click to move a column to the opposite side.
- To select multiple columns at once
  - Click + CTRL - Selects multiple lines in any order
  - Click + SHIFT - Selects a range of lines in row

Sort Tab



Sort fields allow you to order information. The first takes priority, when those are all the same, the program will sort within that section by the selection in the second, and then the third.

- Sort in **Ascending** (A-Z, 0-9) or **Descending** (Z-A, 9-0) order.
- Click Reset Sort to restore defaults.

Common Criteria Sets for Donation Statements

These are examples of the Donation Statement Report Summary detailing the criteria entered on Step 1.

- Default Statement Criteria

  For the date range 01/01/2022 to 12/31/2022 - only those who gave and all regardless of pledging

  Accounts selected: All accounts

  Includes Members, Visitors, inactive.

  Also includes: donations individuals, donations groups.

- Single Gift of $250+

  For the date range 01/01/2022 to 12/31/2022 - only those who gave a single gift of $250 or more and all regardless of pledging

  Accounts selected: All accounts

  Includes Members, Visitors, inactive.

  Also includes: membership groups, donations individuals, donations groups.

- Quarterly Statement for All Pledges

  For the date range 01/01/2022 to 03/31/2022 - all regardless of giving and only those who pledged for all pledge types

  Accounts selected: All accounts

  Includes Members, Visitors, inactive.

  Also includes: membership groups, donations individuals, donations groups.

- Unmet Pledge Progress Statement

  For the date range 01/01/2022 to 12/31/2022 - all regardless of giving and only those who pledged who have not met their pledge for pledge types: Semi-Annual, Quarterly, Monthly, Semi-Monthly, Bi-Weekly, Weekly

  Accounts selected: All accounts

  Includes Members, Visitors, inactive.

  Also includes: membership groups, donations individuals, donations groups.

- All With Any Giving or Pledging

  For the date range 01/01/2022 to 12/31/2022 - only those who gave or only those who pledged for all pledge types

  Accounts selected: All accounts

  Includes Members, Visitors, inactive.

  Also includes: membership groups, donations individuals, donations groups.

- All Participating in a Campaign

  For the date range 01/01/2022 to 12/31/2022 - All regardless of giving and all regardless of pledging

  Accounts selected: All accounts

  Campaign Selected: 2022 Pledge Campaign

  Includes Members, Visitors, inactive.

  Also includes: membership groups, donations individuals, donations groups.

- All Active Membership Records, Regardless of Giving/Pledging

  All regardless of giving and all regardless of pledging

  Accounts selected: All accounts

  Includes Members, Visitors.

- Separate Statements for Children

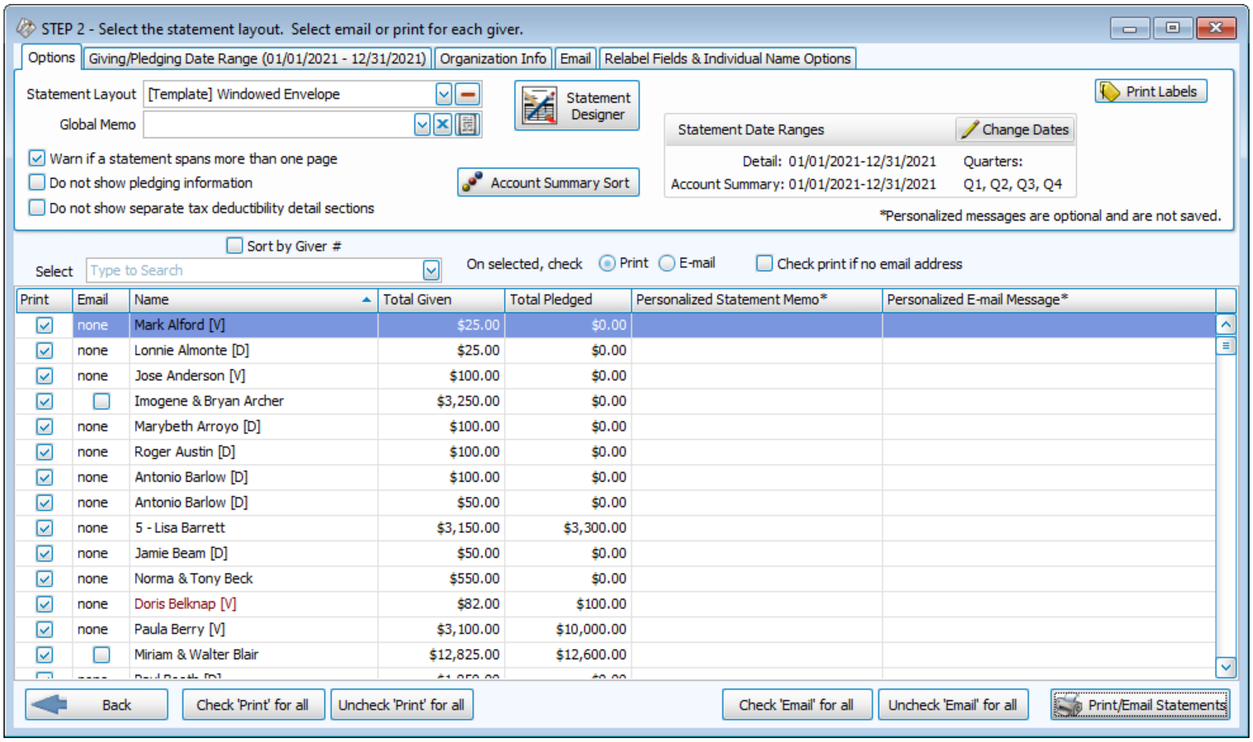
  For the date range 01/01/2022 to 12/31/2022 -only those who gave and all regardless of pledging

  Accounts selected: All accounts

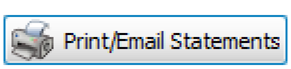
  Includes Members, Visitors

  Criteria: Directory/Report Order = 3 (Child w/ family)

Step 2 - Select the Statement Layout

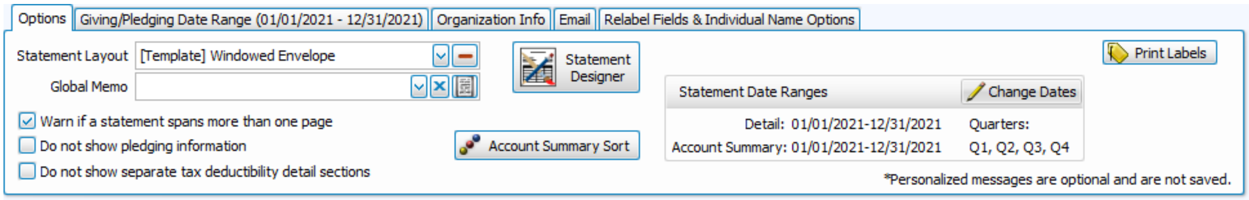


In Step 2, you'll determine what information gets included in your statement. Church Windows provides several options indicated with [Template] in the **Statement Layout** dropdown in the upper left. Below that is the **Global Memo** which allows you to add a text note to every statement.

- Generated statements will appear in a grid in the bottom half of the screen. Search for specific statements using the **Select** drop down. You can sort the grid by **Name**, **Total Given**, or **Total Pledged**. In the **Personalized** columns, you can elect to type a message that will only appear on that the statement or email for that Person or Giving Unit.
- Click 

 to generate statements that are checked in the Print column in a **Print Preview**. Statements that are checked in the **Email** column will prompt a confirmation message before sending.

Options



- **Statement Layout** and **Statement Designer** - Choose an existing template from the dropdown, or click the **Statement Designer** to customize and a save a layout.
- **Global Memo** - The Global Memo appears on every statement. Often, this space is used to say thanks, highlight accomplishments, encourage continued giving, or provide contact information for questions. Add, edit or delete messages by clicking the button.
- **Warn if a statement spans more than one page** - This will provide an alert with a count or list of statements that did not fit on a single page.
- **Do not show pledging information** - This option removes columns and fields for pledging information without having to customize a layout in the Statement Designer.
- **Do not show separate tax deductibility detail sections** - This box prevents the detail section from separating tax deductible from non-tax deductible donations. Tax deductibility totals are determined by the Statement Layout.
- **Statement Date Range** - Click **Change Dates** to control the date ranges shown in each section of the layout. For example, you might elect to show totals for the year in the Account Summary section, but only show the current quarter in the Detail section.

Giving/Pledging Date Range

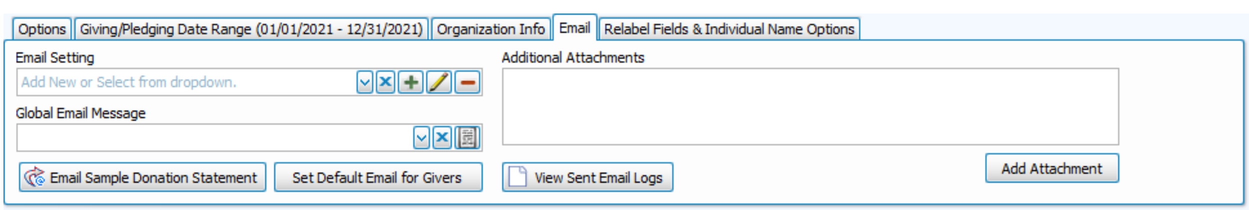
- In Step 1, the selected date range is used as criteria for who statements are produced for. In Step 2, the selected date range determines what shows on the report, for the selected givers.

  Example: You could pull statements for everyone who has had giving in the past 2 years, but only show the most recent year on the statement.

Organization Info

- By default, the **Organization Information** shown on the statement will be brought in from System Information. To use an alternate set of contact information, click to create a new set of information, to edit, or to delete.

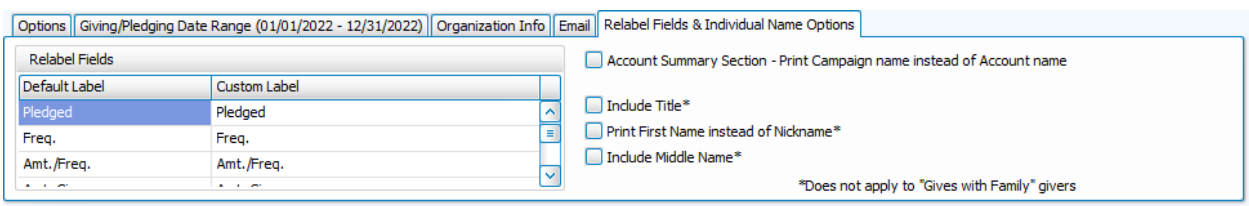
Email



- In the **Email Setting** drop down, you can choose a saved email address that is connected to Church Windows. To add an email address to send statements from, click the and follow the instructions outlined in **Email**.

- The **Global Email Message** is the text that will appear within the subject line and body of the email. Global Memos from the Options tab will be included on the attached statements. Add, edit or delete messages by clicking the button.
- Click **Email Sample Donation Statement** to see an example of what your message will look like.
- Click **Set Default Email for Givers** to open Donations Settings which allows you to choose from Email fields in Membership as the default for statements.
- **View Sent Email Logs** opens a window that lists a summary of an email batch with email address and whether they were sent or failed.
- Include additional documents to your email with the **Add Attachment** button.

Relabel Fields & Individual Name Options



- **Relabel Fields** included in statements on this tab if you use different terminology at your church or would like to change the default. Editable terms are Pledges, Freq., Amt/Freq., Amt. Given, Prior Giving, Over/Under, and Non-Pledged.
- **Account Summary Section - Print Campaign name instead of Account name** - Check this box to list a Campaign (*2023 Pledge Campaign*) instead of the giving account associated with it (*General Fund*).
- **Name Options** - For individuals, you can elect to include their **Title**, **First Name** (instead of Nickname, if indicated as Preferred Name), or **Middle Name**.

> Name options will only apply to Individual Givers who have not been included in a Giving Unit with the Gives with Family check box. Giving Unit statements names use the Group Name or Mailing Label.

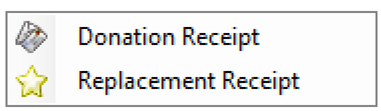
Donation Receipts

To produce Donation Receipts in compliance with Revenue Canada, **Administration > System Information** must have the country set to Canada.

Access

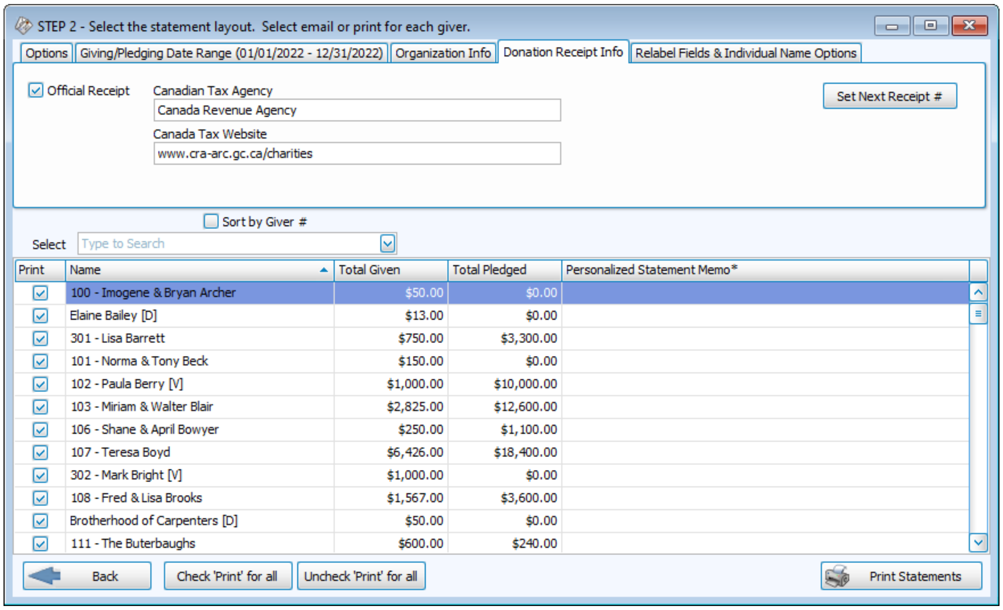
To access from the Button Bar, go to **Reports/Export > Donation Statement > Donation Receipt.**

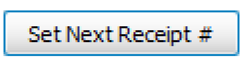
To access from the Home Screen, go to the **Quick Access Button**.

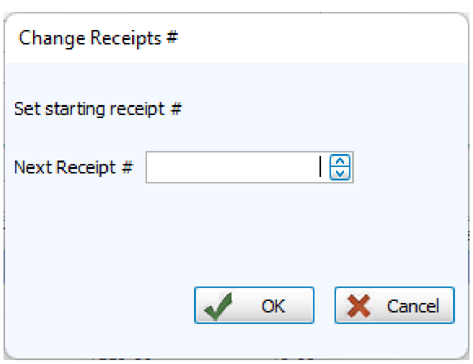


Printing Donation Receipts involves the same features and procedures as **Donation Statements** and the **Statement Designer**, with the following adjustments to meet Canadian requirements.

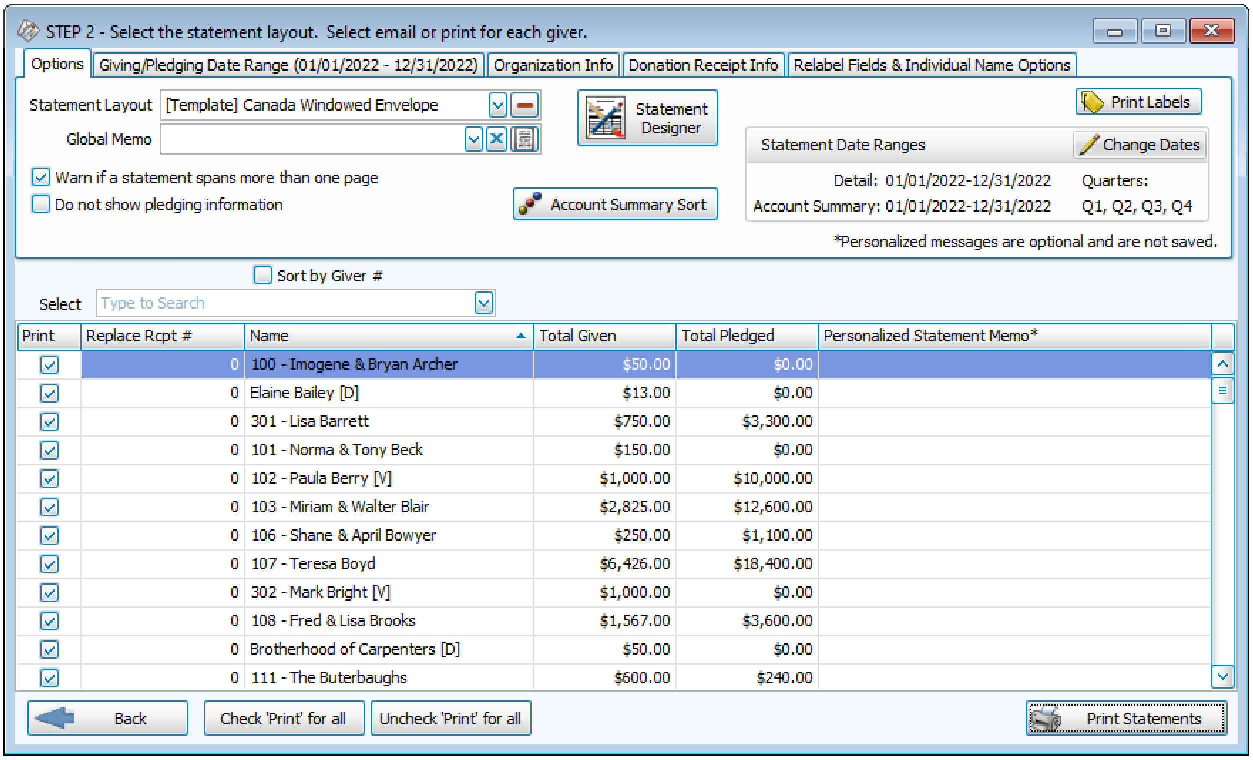
Donation Receipt Info



- In the Step 2 - Layout window, the **Donation Receipt Info** tab contains settings for Receipt Numbers and text entry for the Canadian Tax Agency and Tax Website.
- The **Official Receipt** check box allows you to produce Receipt Numbers. To generate informational copies, deselect this box to review receipts in the Print Preview window.
- Click  to open **Change Receipt #**. If this has already been set, changes are password protected and require unlock by our Support team. For the initial entry, enter the number and click OK.



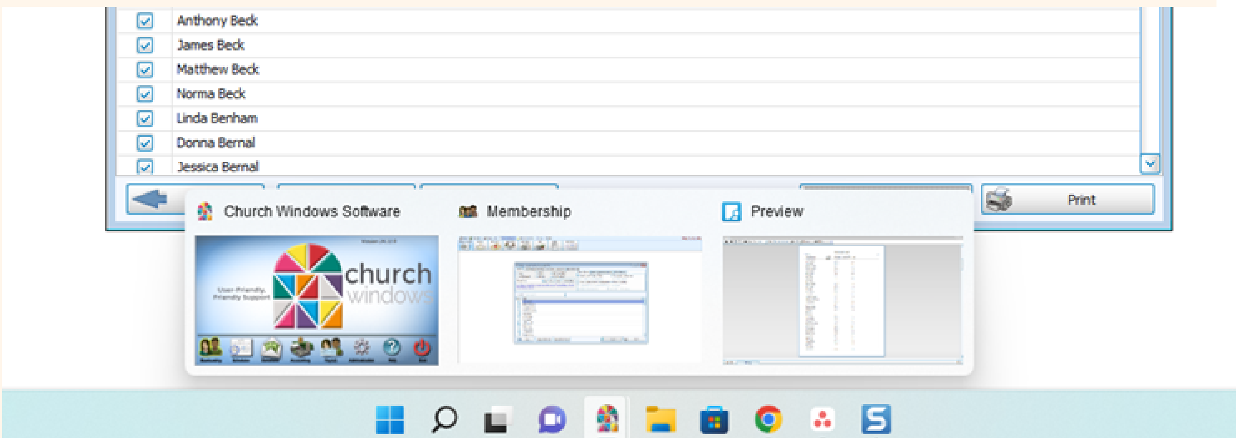
Replacement Donation Receipts



- In order to create a replacement donation receipt, you'll need the original receipt number.
- Click Uncheck 'Print' for all and then look up the person in need of a replacement.
- Enter the original receipt number into the Replace Rcpt # column.
- Confirm the new number and click OK.

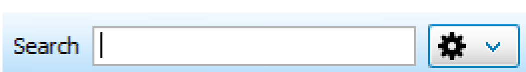
Print Preview

From this screen you can review, export, or print. Controls for the Print Preview are located at the top of the screen.

> If you click the 
>
> button but the Print Preview doesn't appear, it may be opening behind the program. Hover over the Church Windows icon on your start bar to see all the open windows associated with the program. Click Print Preview to bring it to the front.
>
> 
>

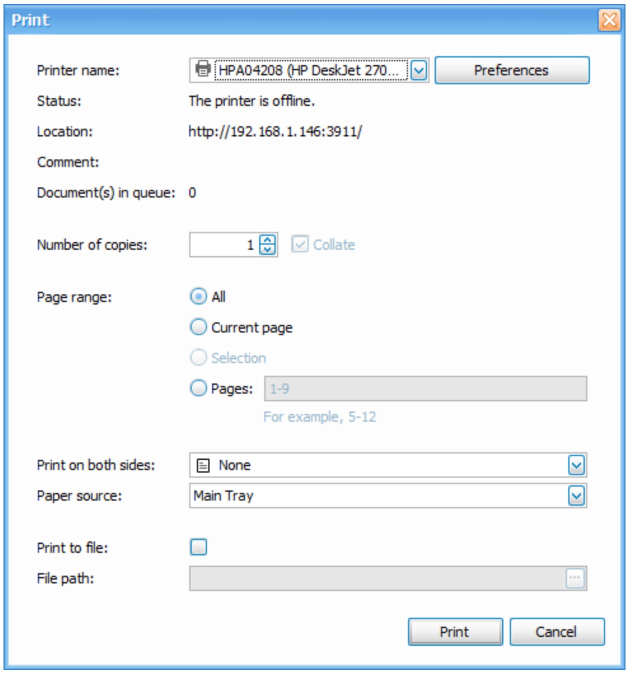
 Search

Search allows you to find a word or phrase in the document.



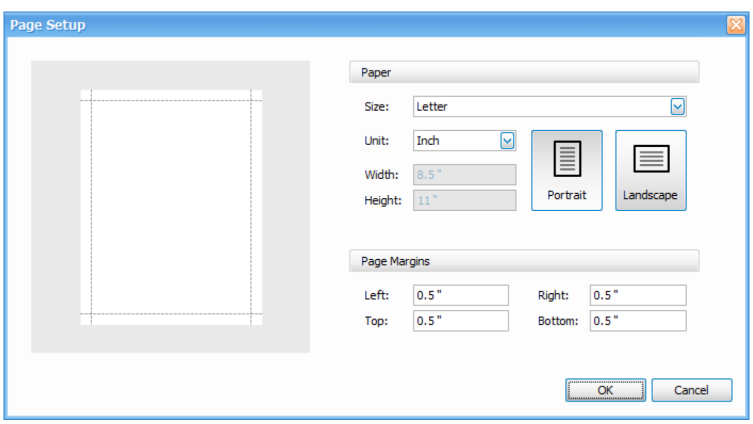
Print

This button sends your document to your printer. Check that the correct printer is selected at the dropdown at the top and the options, including page range and preferences are correct and click the Print button again.



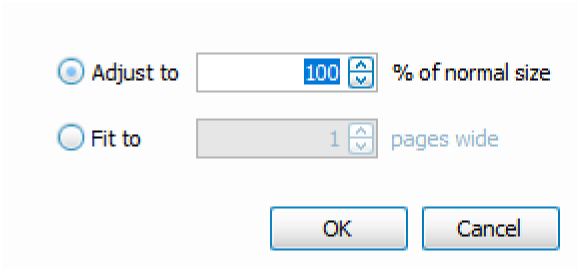
Page Setup

Click Page Setup to adjust paper size, page orientation, and margins.



Scale

Scale adjustments allow you to adjust the printed size.



Hand Tool

The hand tool allows you to click and drag to move around the page.

Magnifier

This control changes your zoom level.

Zoom

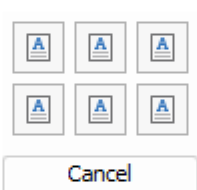
The zoom tools allows you to specify a zoom level or choose options like fitting to page width.

Page Navigation

These pages allow you to go directly to the First, Previous, Next or Last page of your document.

Pages

This control allows you to choose the number of pages to display.



 Watermark

This button allows you to add text or a picture to the background of the printed report.

Export & Email

These buttons allow you to Export your document and save it to your computer or export and attach the document in an email client.

 Info

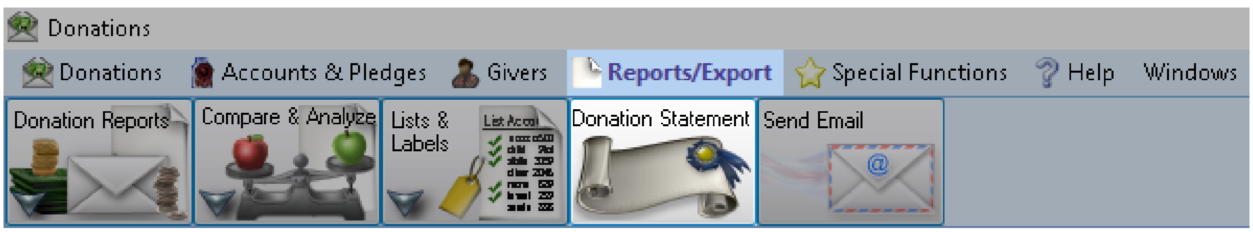
The info button pulls up the Report Information, often included at the end of the report. You'll find a total count of individuals, the criteria used to get to this figure, and additional relevant information. In Labels the Report Information will also list a count by zip code.

Statement Designer

The Statement Designer is a design tool with customizable sections for donations statements. Use statements to show detailed end of year giving, pledge campaign progress throughout the year, and fulfill charitable giving requirements. The [Template] layouts included with the software can be copied and used as a starting point for a customized layout.

Access

To access from the Button Bar, go to **Reports/Export > Donation Statements > Statement Designer**



To access from the Home Screen, go to the **Quick Access Button**

Using the Statement Designer

- The white grid portions of the screen represent the workable area where you can place content. Light gray portions are often portions sectioned off for the next column which will repeat the layout. Fields backed with a light purple color are inside of a field connector. Fields that have a yellow barrel indicate fields that will pull information from the database. Fields that show up in pink indicate that they are overlapping with another field.

- Fields can be dragged and dropped with your mouse or, once selected, you can use the arrow keys to move fields. For more minute control, hold the **CTRL** key while using the arrows on your keyboard to move objects. Holding **SHIFT** and **CTRL** will stretch or shrink objects.
- To move through each field, you can click on one and hit the **TAB** key to move to select the next field.
- Clicking and dragging within the grid area will create a box that will select all of the fields it overlaps, allowing you to select multiple fields at once. If the fields are all text fields (make sure that the light purple label connectors are not selected) you can make formatting adjustments like font or size to multiple fields at once. You can also select multiple fields by holding the **CTRL** key as you're selected or deselecting fields.
- The 🚫 symbol in the grid typically indicates that you're attempting to insert an object into an invalid section.

Controls and Tool Bars

Main Toolbar

Save As

Clicking the Save As... button will prompt you to give the report a new name. If you are editing an existing layout or a [Template] layout, this will save a copy with a new title rather than overwrite the existing file.

Save

Clicking the Save button will save the changes and update the report you selected to edit.

CTRL + A

Cut

The  button will remove the selected object and store it in your clipboard to be pasted elsewhere.

CTRL + X

Copy

The  button will make a copy of the selected object to your clipboard while leaving the original in place.

CTRL + C

Paste

The  button will place the object currently in your clipboard from Cut or Copy.

CTRL + V

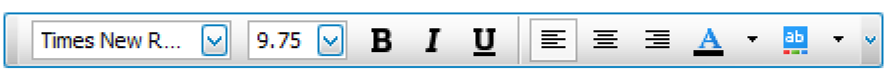
Undo and Redo

These  buttons are the undo and redo buttons. The arrow going to the left will undo your last action. The arrow going to the right will redo an action that was previously undone.

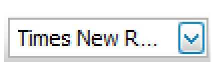
Undo - **CTRL + Z**

Redo - **CTRL + Y**

Format Toolbar

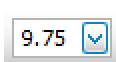


Font Name



The font dropdown window lists the available fonts.

Font Size



The font size drop down allows you to control the size of the font.

Font Decoration

These buttons will apply **bold**, *italic* or underline effects to text.

Bold - **CTRL + B**

Italic - **CTRL + I**

Underline - **CTRL + U**

Text Alignment

The text alignment will determine whether text within a field will align to the left, centered or to the right.

Foreground Color

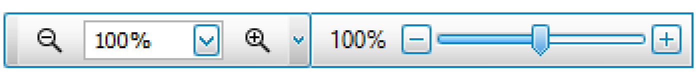
Foreground color will change the color of text, borders, or lines.

Select a color from the defaults or click the tabs or More Colors... for more customizable options.

Background Color

Background color will change fill color of the selected field.

Zoom Toolbar

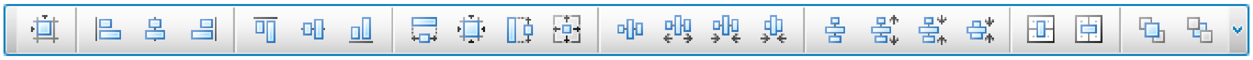


These tools allow you to zoom in or out within the Statement Designer. These settings will not affect the printed output, only the display within the Statement Designer. You can either use the zoom in and out buttons or dropdown in the Main Toolbar at the top of the screen or use the buttons or slider at the bottom of the screen. Zooming in can help you distinguish and select fields that are small or condensed.

Zoom Out - **CTRL + Minus**

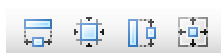
Zoom In - **CTRL + Plus**

Alignment & Spacing Toolbar

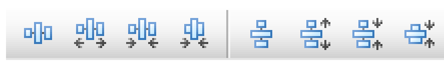


Align to Grid  Align the positions of the selected objects to the grid.

Align Fields  Align the selected objects.

Size Fields 

Make selected controls the same height and/or width or size the selected object to the nearest grid lines.

Space Fields 

Equalize, increase, decrease, or remove spacing horizontally or vertically between objects.

Center in Section 

Horizontally or vertically center objects within a report section.

Send to Front or Back 

Send objects to the front or back.

Statement Section Toolbar

Account Summary

Click the check box to include or exclude the Account Summary section.

Click Edit Account Summary to format the appearance and choose columns.

Account Summary Date Range: 01/01/2021 - 12/31/2021

Account (Pledged Dates)	**Freq.**	**Amt./Freq.**	**Pledged**	**Prior Giving**	**Amt. Given**	**Over/Under**
Missions	N/A	0.00	0.00	0.00	100.00	0.00
General Fund (01/01/21 - 12/31/21)	M	130.00	1,560.00	0.00	1,740.00	180.00
Community Action	N/A	0.00	0.00	0.00	40.00	0.00
Building Campaign	N/A	0.00	0.00	0.00	1,000.00	0.00
		Grand Total	1,560.00	0.00	2,880.00	180.00

Detail Section

Click the check box to include or exclude the Account Summary section.

Click Edit Detail Section for options, to format the appearance and choose columns.

Date	Account Name	Amount	Check #	Date	Account Name	Amount	Check #
Tax Deductible							
1/10/21	General Fund	$130.00	5046	4/18/21	General Fund	$300.00	5066
2/21/21	Building Campaign	$1,000.00	5055	4/18/21	Missions	$100.00	5065
2/21/21	Community Action	$20.00	5054	5/9/21	General Fund	$150.00	5067
2/21/21	General Fund	$130.00	5054	7/18/21	General Fund	$300.00	5082
3/14/21	Community Action	$20.00	5060	10/10/21	General Fund	$300.00	5097
3/14/21	General Fund	$130.00	5060	12/19/21	General Fund	$300.00	5107

Quarterly Section

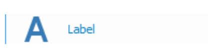
Click the check box to include or exclude the Account Summary section.

Click Edit Quarterly Section for options, to format the appearance and choose columns.

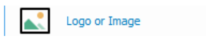
	Pledged	Non-Pledged	Total		Pledged	Non-Pledged	Total
2021 - Jan	130.00	0.00	130.00	2021 - Jul	300.00	0.00	300.00
Feb	130.00	1,020.00	1,150.00	Aug	0.00	0.00	0.00
Mar	130.00	20.00	150.00	Sep	0.00	0.00	0.00
Q1	$390.00	$1,040.00	$1,430.00	**Q3**	$300.00	$0.00	$300.00
Apr	300.00	100.00	400.00	Oct	300.00	0.00	300.00
May	150.00	0.00	150.00	Nov	0.00	0.00	0.00
Jun	0.00	0.00	0.00	Dec	300.00	0.00	300.00
Q2	$450.00	$100.00	$550.00	**Q4**	$600.00	$0.00	$600.00
				Total	**$1,740.00**	**$1,140.00**	**$2,880.00**

Standard Controls

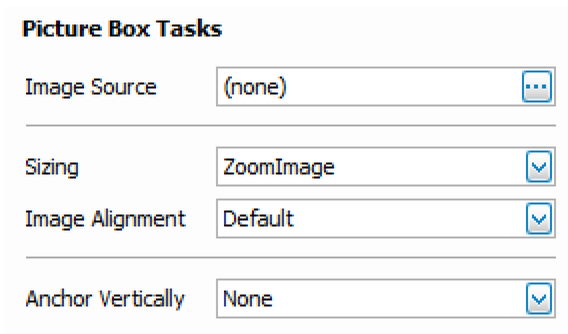
Selecting the pointer will return your cursor to the original state in order to select objects.

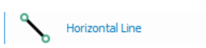


The Label control allows you to insert a label or text field. Double click inside a label to edit the text, or click the  icon to open Label Tasks.

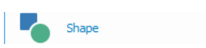


The image tool places a frame in your report that allows you to add an image file from your computer. Valid image file types include BMP, JPEG, GIF, EMF, WMF, TIFF, PNG, ICO, and SVG. To select an image, click the icon of the image frame and click the next to Image Source to browse to the image file.

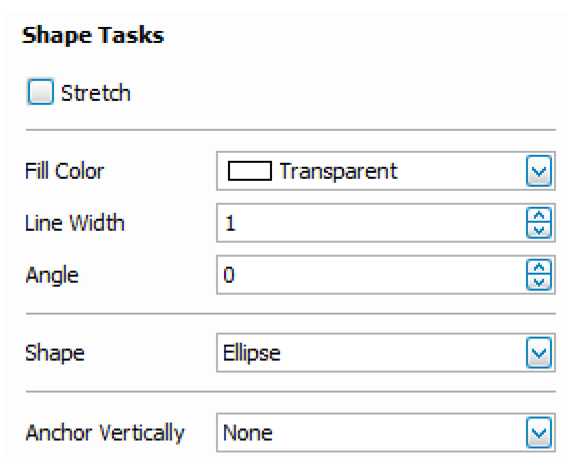




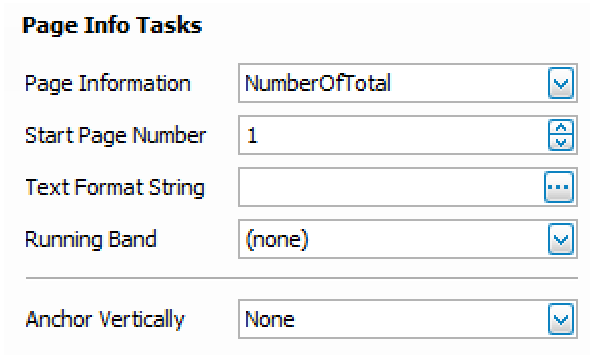
Horizontal line inserts a line that can be set to a length you determine onto the page.

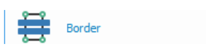


The shape tool allows you to add a simple geometric shape to your report design. Click and drag the shape object onto your report and click the icon to open Shape Tasks where you can choose the shape, settings, and fill color.

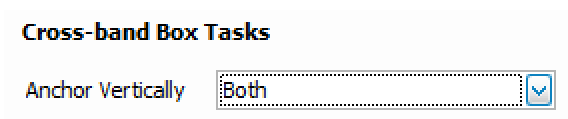


Page Information allows you to insert a variable that provides automatically generated information such as page numbers, date and time stamps. Click the to open Page Info Tasks.





The Border tool allows you to place a rectangular container around objects in your report. This differs from a transparent rectangle from the shape tool in that it can cross through multiple report sections and will now give the pink overlapping alert provided that the border itself and the objects within it are not overlapping.



Data Controls

Giver Name — Name of individual or giving unit

Global Memo — Message set on **Step 2 > Options > Global Memo**

Quarterly Date Range	Date range for the Quarterly section determined on **Step 2 > Options > Statement Date Ranges**
Required Tax Agency Statement	Message consistent with IRS requirements for charitable contribution statements.
Statement Print Date	Date that the statement was produced.
Account Summary Date Range	Date range for the Summary section determined on **Step 2 > Options > Statement Date Ranges**
Detail Date Range	Date range for the Detail section determined on **Step 2 > Options > Statement Date Ranges**
Statement Date Range	Date range for Statement determined on **Step 2 > Giving/Pledging Date Range**
Total Given	Grand total of all donations recorded for this giver or giving unit
Total Tax Status Unknown	Total for donations with an undetermined tax deductibility status
Total Tax Deductible	Total for donations to tax deductible giving accounts
Total NonTax Deductible	Total for donations to non-tax deductible giving accounts
Giver Name and Address	Name of the individual or giving unit and mailing address
Giver Address Only	The mailing address of the individual or giving unit
Giver #	Giver or Envelope # as determined by the Giving/Pledging end date set in **Step 1**

Mailing Label, Name	For individual givers, their mailing label followed by their first and last name. For giving units, this returns only the mailing label.
Statement Memo	The personalized statement message as entered on **Step 2**
Organization Info Field	Field options from Organization Info as set in **Step 2 > Organization Info**

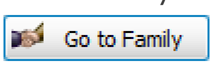
Donation Statement Troubleshooting

Here, we've outlined some common requests for statements and solutions to scenarios with unexpected results.

Generating Statements

Missing a Statement

If you run your statements and didn't get a statement you expected, here are some checks to go through.

- **Receives Statement Box**
    - In order to generate a statement, givers must have the Receives Statement box checked in Manage Givers.
    - Go to **Givers > Manage Givers > Name Tab**
    - Check the box if it is empty. If the box is 'grayed out', then you're on an individual profile for someone that is marked as a Giving Unit. Navigate to their Family or Group settings by going to the Giver # tab and clicking the 

button to access the Receives Statement check box on the name tab for everyone in the giving unit.
    - You can also go to **Special Functions > Settings** and click the
- **Step 1 Criteria**
    - Statements generated and viewable in Step 2 of Donations Statements must have Receives Statement checked *and* meet the additional criteria set in Step 1.
    - For example, if the Donations Individuals box is unchecked in **Step 1 > Edit People Selection Criteria**, you won't generate statements those people.

    - People can also be eliminated from a batch of statements if they don't meet the Giving/Pledging Criteria. If you default to "only those with giving," you will not get any statements with $0 totals. If you're not sure if someone gave, you can check in Browse Donations.
- **Typos and Name Changes**
    - Verify that you're searching for the correct name and spelling. You can do this by searching Manage Givers or Browse Donations. If the record isn't found here, they may be listed under a different name. You can use Browse to search for a date or specific donation.

Two Statements for One Giver

If you run statements and get two different statements for the same giver, you've encountered a case of duplication and may want to Consolidate Duplicate Records. To move donation history to one record, you can use Transfer Donations.

Married Couple Getting Separate Statements

If you come across two individuals that should be listed together on their statement, you can link them with the Gives With Family check box in Manage Givers under the Giver # tab. This will create a Giving Unit so that their donations are all included on one statement. Giving Units must be made up of people in the same Family Record in Membership.

Statement Design

Remove Quarterly Section

Some churches may not want to include some sections in order to create a shorter version for their donation statement. To remove a section, select the template you want to edit from the Layout Dropdown in Step 2 and click the **Statement Designer** button. In the section toolbar at the top of the designer, uncheck the box for the section you want to remove. You may need to reduce the space on the statement after doing so.

Every Other Page is Blank

If you've run your statements but in the print preview you see that there's a page with content, then a blank page, content, then another blank page throughout your statement production, that indicates an issue with your statement layout.

- In order to fix this, you'll need to go into the **Statement Designer** and look for any fields that are highlighted in a pink color. Typically, what causes this result is a field that is overlapping the left or right margins in your design. When this occurs, the program tries to complete your layout horizontally.
- Once you have moved the overlapping field within the bounds of your page, the pink highlight will disappear.
- If you're having trouble locating the offending element on the page, try clicking and dragging over the report to select all fields. With this method, even the field is small or in an odd place, it should be easier to spot.

Excess White Space

Sometimes in adjusting the layout, a large area of space is left within the layout. This increases the number of statements that span multiple pages and can prompt a warning from the program that the layout needs adjusted.

- Go into the **Statement Designer** and find the area with too much empty grid space.
- Hover your mouse over the section to be adjusted (for statements, typically the StatementFooter band) until it becomes a vertical double arrow. You can also use the three lines on the ruler on the left side of the screen. Click and drag the

section up to the content, reducing the amount of white space. Save the layout and check the results in the **Print Preview**.

Statement Content

Incorrect Donations

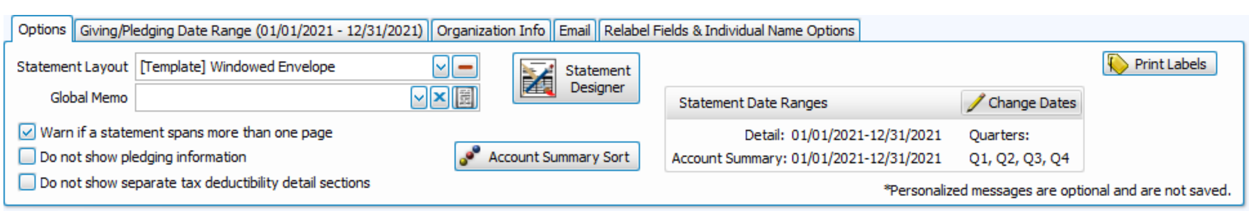
If there is an error on a statement regarding an individual donation, this gets corrected in the Browse Donations screen where it you can Correct Donations. If a donation was assigned to the wrong person, you can Transfer Donations. That correction will be reflected after running the needed statements again.

Missing Donations

You can view all donations by going to Browse Donations. If there are donations that have been entered but do not appear on the statement, check to make sure the giving account has been set up properly in Manage Accounts. Make sure that the account has Print On Statement checked. If the account is non-tax deductible, then make sure that the statement layout includes these totals.

Irrelevant Information

You may notice fields for pledging or non-tax deductible giving on a statement, but these may not apply to your church. These fields are based on settings elected on the **Step 2 > Options Tab**.



- There is a [Template] Windowed Envelope, which includes information about totals from giving to accounts that are indicated as non-tax deductible in Manage Accounts and [Template] Windowed Envelope (No Tax Deductible Totals), which omits those fields. You can also use the **Statement Designer** to add or delete these fields individually.
- The pledging information box is located in the lower left of the Options tab.

Pre-Paid Pledging

Pre-Paid Pledges are donations that are made in one year but indicated for a pledge in the future. The donor can claim their pre-paid donation in their tax filing in the year it was made so in the next year's statement, it will shown as reducing their pledge but is not totaled in the giving for the year. In their statement, the amount of last year's pre-paid donations shows in the Prior Giving column in the Account Summary section.

Emailing Statements

Incorrect Email Address

Many individuals have more than one email address. In Donations Settings you can Mass Assign Default Email Field from the Membership module, while email settings for individual donors can be set in Manage Givers.

Send/Connection Errors

- Review your **Email** settings. Test them by performing a connection test and by sending a test email.
- The most frequent reason for a connection failure is an incorrect password. Ensure your email credentials are correct by logging in to your email through a web portal. If you are unable to log in, reset your password and update the new

password in the email settings.

- Some email service providers, such as Gmail, require a special application password. This function is often found by logging in to your email account and going to security settings. Gmail App Password allows you to create a unique password that you'll enter in Church Windows. Gmail no longer supports third party application access without this layer of authentication.
- In order to prevent spam emails, some providers place restrictions on the number of emails that can be sent or the amount that can be sent at once. If you have a very large numbers of emails to send, you may need to send batches over several days. To increase the time in between each outgoing email, enter the amount of time in seconds by going to **Setup SMTP Email > SMTP Server**.

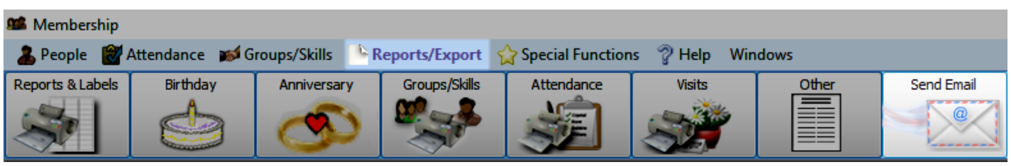
Email

Church Windows allows you to connect your email account in order to collect email addresses entered into Church Windows. You can also generate mailing lists based on things like group assignment, giving or membership criteria. Some popular use of this function might include:

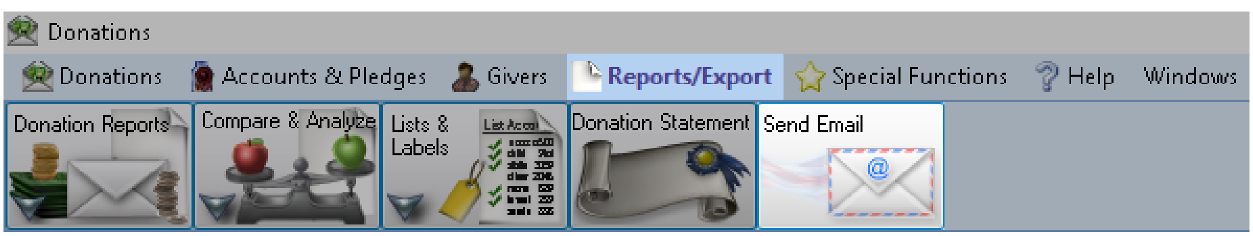
- Sending a periodic newsletter to a list of email subscribers
- Emailing donation statements to givers
- Attaching and sending reports to those listed in a specific committee

Access Email

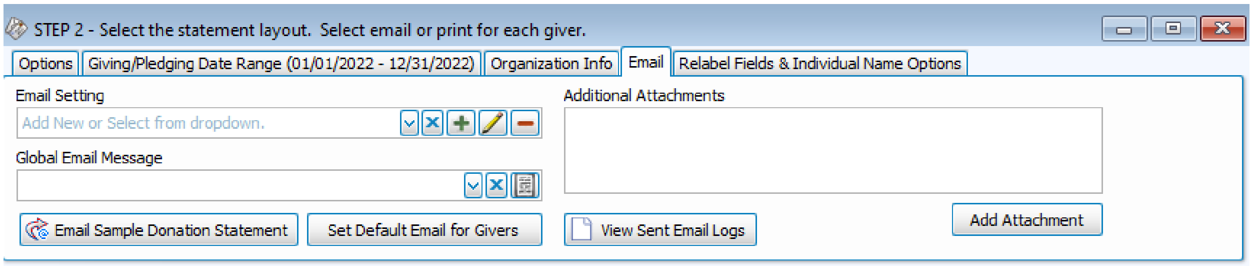
To access from the Membership Button Bar, go to **Reports/Exports > Send Email**



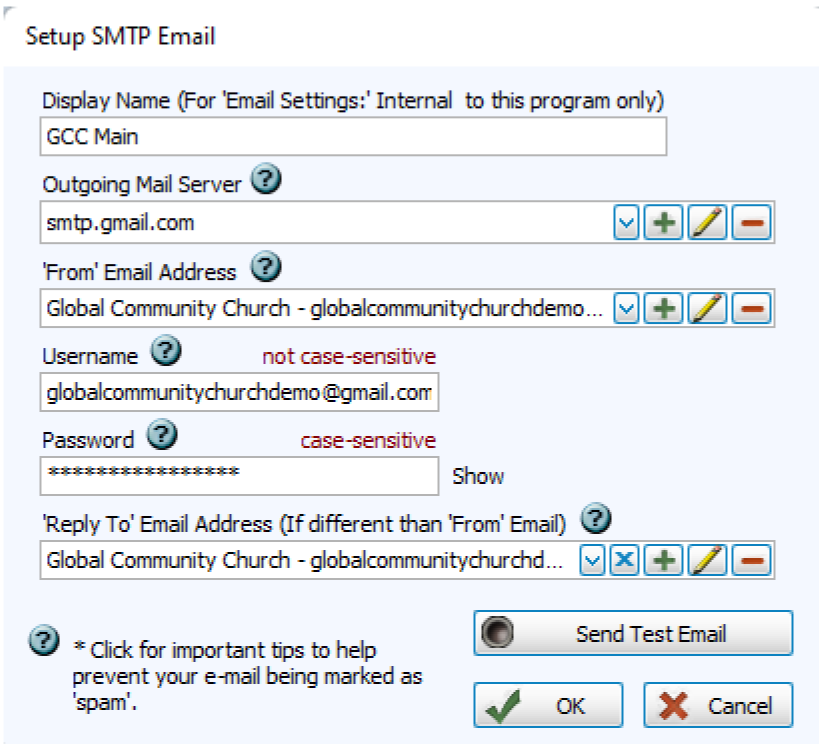
To access from the Donations Button Bar, go to **Reports/Exports > Send Email**



To access from the Step 2 - Statement Layout window, go to **Reports/Exports > Donation Statements > Email Tab**



Email Setup

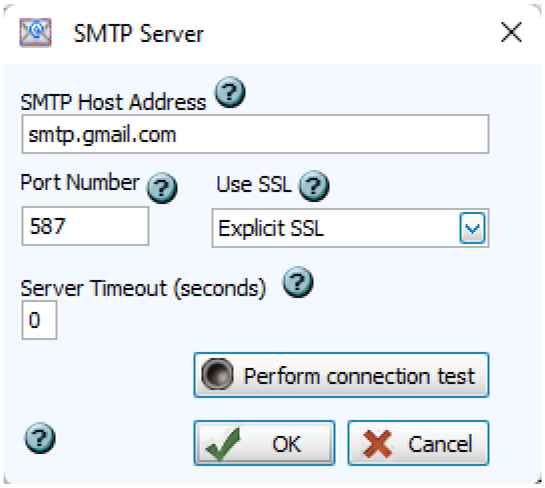


- To use the email function, you will need to connect your email account. Email service providers can differ from one another, but the essential information is basically the same. You will need your log in information for your email account.
- Multiple email accounts can be set up within Church Windows. This allows users to send emails from their individual work email account or the larger organization email account. Each of these accounts will be listed in the **Email Setting** drop down list.

Add an Email Account

1. Click the  button for **Email Setting**.
2. Enter the **Display Name**. This is what the account will be listed as in the Email Setting drop down.

3. Click to add a new Outgoing Mail Server.



You must perform a successful connection test to save these settings.

> Outgoing Mail Server settings can be shared by multiple email addresses so these settings only need to be added once per email service provider. You can find these for your email by doing a web search for "Your Email Provider" and "SMTP settings." The top results tend to be the most reliable and accurate.

SMTP Host Address

SMTP stands for Simple Mail Transfer Protocol. This address is set by the mail application and is used to receive and pass along communications.

Examples: smtp.gmail.com, smtp.mail.yahoo.com, smtp.mail.me.com

Port Number

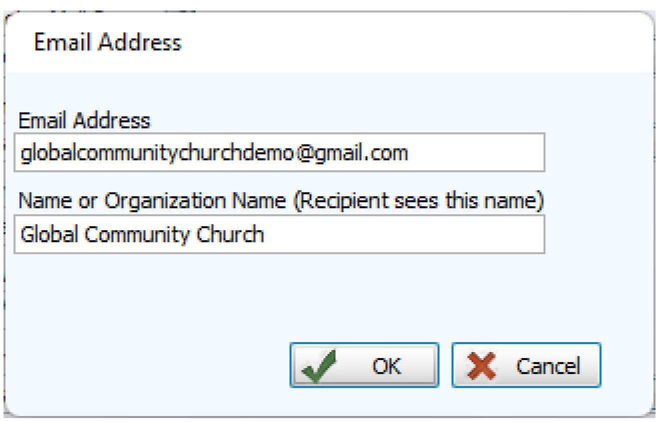
The port number is a part of the address that designate how individual computers connect to each other. The most common port is 587 for email submission.

Examples: 25, 587, 465, 2525

Use SSL	SSL stands for Secure Sockets Layer and protects your information while being transferred across the internet. Explicit SSL is recommend if offered by your email host. *Examples: Implicit SSL, Explicit SSL, No SSL, Basic No SSL*
Server Timeout	This setting typically remains at 0, but may be increased if you run into issues with sending large batches of emails. This adds a hold time to avoid hitting a limitation set by your provide on the number of emails you can send in a given time frame.

4. Select **From Email** Address.

   This is the email account from which emails will be sent. Click to add a new one; to edit; to delete.

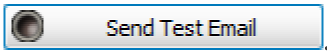


5. Enter Email Credentials, **Username** and **Password**.

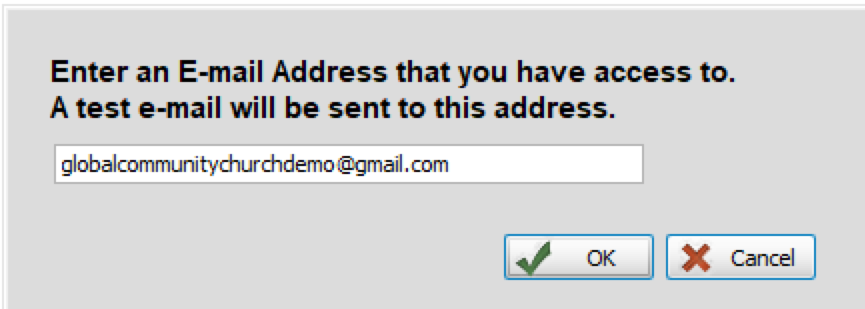
> Your email service provider may require an App Password to integrate with programs like Church Windows. In this case, you'll generate a special password in your email security settings and enter that here.

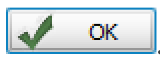
6. *Optional*: Set a **Reply To** Email.

   When a recipient clicks the reply button in their email, this is the email the reply will be sent to. The sender will still show as the From Email address.

7. Send a Test Email. Before a test is sent the button appears like this 

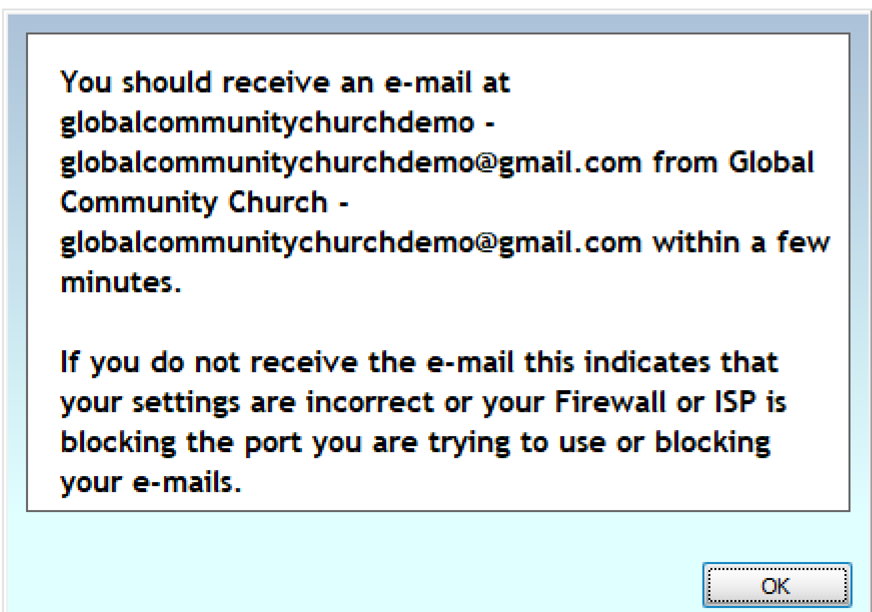
.



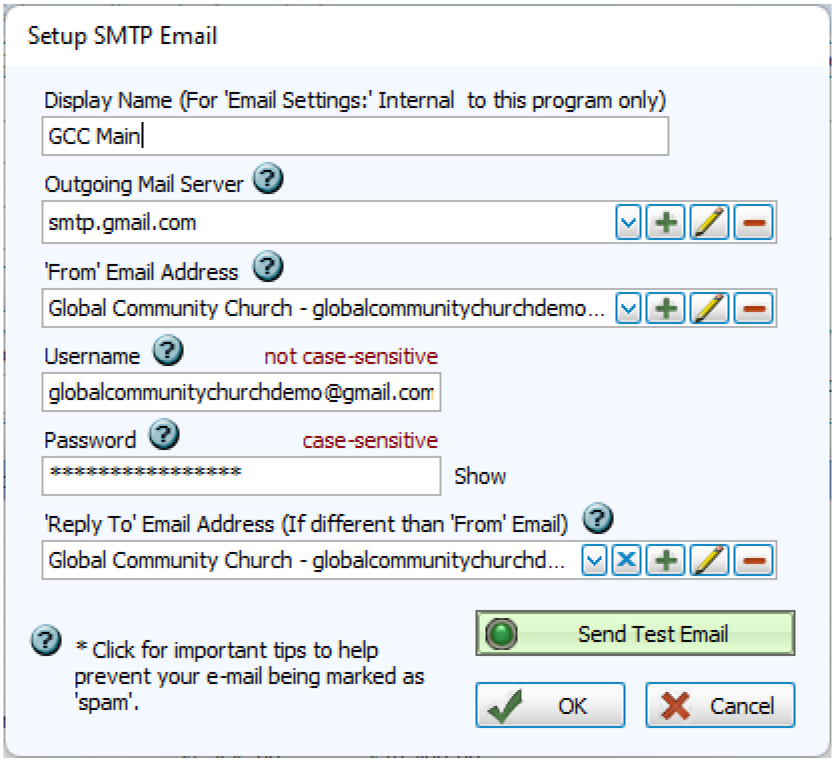
To save the new email confirmation, you'll need to successfully send a test email. Enter the test recipient and click 

.

A successful send will produce this message. Check the associated email account to confirm.



8. Click  to save your Email Settings. The Send Test Email button will appear in green once the settings have passed.



Edit an Email Account

1. Select the email setting to edit from the drop down and click .

2. Make changes to the needed areas. You will need to perform a connection test if you change Outgoing Mail Server settings and all changes are confirmed by sending a test email.

Delete an Email Account

1. Select the email setting to edit from the drop down and click .

   This will permanently erase the email settings.