



# Ministry Brands<sup>®</sup> Advance Your Knowledge Webinar Series

**It is Time for Giving Statements,  
Again!!**

**Welcome**

Please take a moment to locate the Zoom Webinar controls.  
Feel free to say hello or ask a question using the Q & A feature.

# Welcome – Introducing our Panelists



Ben Lane  
Staff Trainer



Carmen Dea  
Staff Trainer





# Why run Statements?

Year-end giving statements provide donors with a convenient summary of their charitable contributions but there are other reasons for providing them.

- Required by the IRS to substantiate a gift of \$250 or more.
- It's an opportunity for your organization to express its appreciation.
- Donors can view their giving against their own personal goals or pledges.



# Who receives a Statement?

- As mentioned earlier, a donor needs the statement to substantiate their gift if it is \$250 or more.
- The Evangelical Council for Financial Accountability, or ECFA, has a video on 'Church Charitable Gift Reporting' that we believe will be helpful to your ministry regarding requirements for charitable gift reporting :

<https://vimeo.com/groups/713865/videos/492508530>



# What needs to be on our Statement?



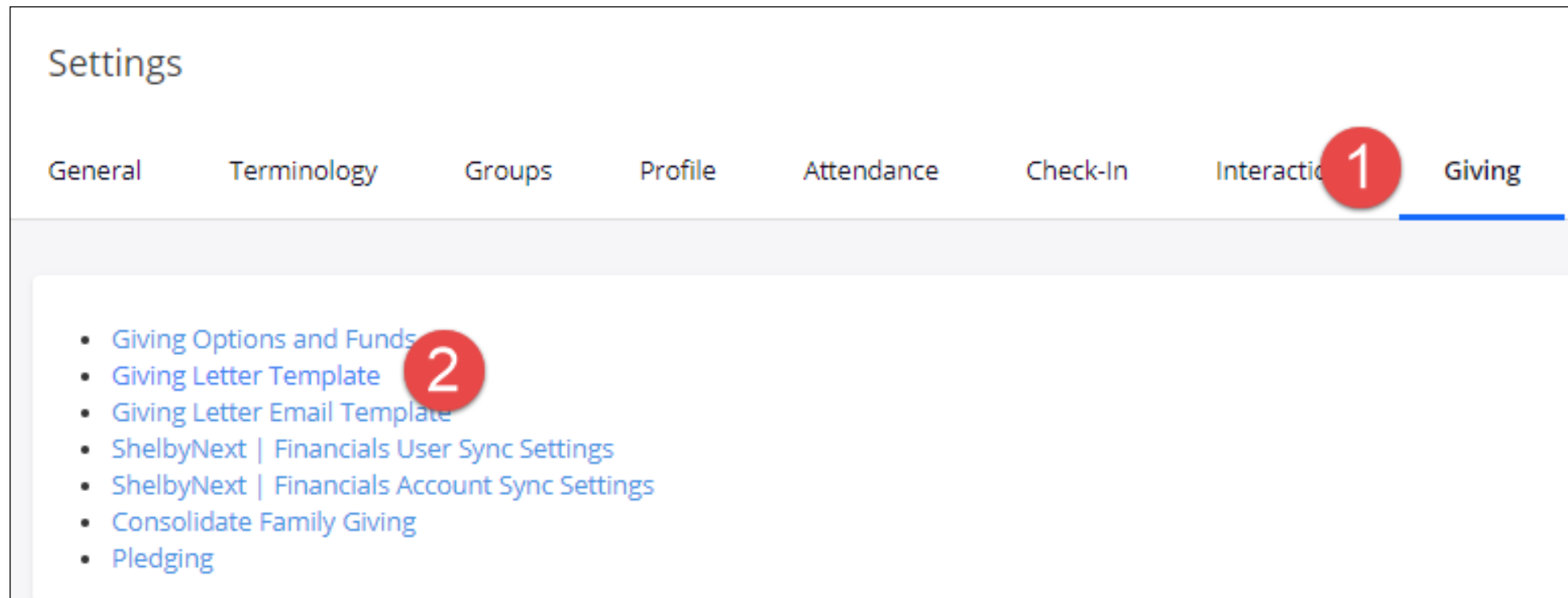
At minimum, the IRS Requires for Cash Donations...

- Name of your Organization
- Amount of Cash Donation – this includes check, cash, or online
- Gift Date
- Description
- Disclaimer that only “intangible religious benefits were provided” or something similar

<https://www.irs.gov/taxtopics/tc506>

# Getting Started

- Choose Settings > Giving > Giving Letter Template



Settings

General Terminology Groups Profile Attendance Check-In Interactions **1** Giving

- Giving Options and Funds
- Giving Letter Template **2**
- Giving Letter Email Template
- ShelbyNext | Financials User Sync Settings
- ShelbyNext | Financials Account Sync Settings
- Consolidate Family Giving
- Pledging

# Placeholders

- Placeholders are essentially **merge fields**.
- Various placeholders are available for the style of names or giving detail desired.
- Copy and Paste or type the Placeholder ex. @MEMBERADDRESS where you'd like it to appear on your template (statement)

Placeholders
@FIRSTNAME - The Individual's first name, or the name of the primary family member, under whom giving has been grouped. Ex: John.
@FULLNAME - The Individual's Formal Full Name or first name and last name. Where giving has been grouped, this is the name of the primary family member. Ex: Dr. John R. Smith, Jr. Ex: John Smith
@PREFERREDNAME - The Individual's preferred name, or the name of the primary family member, under whom giving has been grouped. Ex: Johnny.
@PREFERREDFULLNAME - The Individual's full name, or the name of the primary family member, under whom giving has been grouped. Ex: Johnny Smith.
@FAMILYNAMES - The Family Greeting Name if it exists, or the first name(s) of the Individuals represented on the letter. Ex: John. Ex: John and Margaret. Ex: John, Margaret, and Jack
@FAMILYFULLNAMES - The Family Label Name if it exists, or the full name(s) of the Individuals represented on the letter. Ex: John, Margaret, and Jack Smith. Ex: John Smith, Maggie Jones, and Jack Smith
@FAMPREFNAMES - The Family Greeting Name if it exists, or the preferred name(s) of the Individuals represented on the letter. Ex: John. Ex: John and Margaret. Ex: John, Margaret, and Jack
@FAMPREFFULLNAMES - The Family Label Name if it exists, or the preferred full name(s) of the Individuals represented on the letter. Ex: Johnny and Maggie Smith
@ENVELOPENUMBER - The Individual's envelope number
@MEMBERADDRESS - The Individual's address. Ex: 123 Main St. Town, FL 32378
@DATE - The date on which the report is printed. Ex: 01/02/2023
@DATERANGE - The date range of the giving report. Ex: 01/01/2010 - 12/31/2010
@LINES - The individual lines in the person's giving record. Includes the date, Fund, Tax Deductible Status, and amount. Ex: 10/21/2010 General \$154.23
@LINESWITHNOTES - Same as above, but with notes included.
@SUBTOTALS - The totals of the person's giving for each giving Fund.
@PLEDGES - The individual's pledges and their status, including all "Active" campaigns and any pledge with contributions during the statement period.
@TOTAL - The total given by the Individual in the given date range. Ex: Total: \$123.45
@LINES_TAXDEDUCTIBLE - The individual lines in the person's giving record for tax deductible Fund. Includes the date, Fund, and amount. Ex: 10/21/2010 General \$154.23





# Basic Statement Design

- More than one Template can be created. For example, one for mailing and another for email.
- Good idea to only use the **'Tax Deductible'** fields so donors aren't confused on how much they can deduct.
- Choose the Mailing Label that will match the name on the statement.
- Include in the message the IRS disclaimer and who to contact if they have a question regarding their statement.

Template Name

Default

Use This Template When Users Download Their Own Statements Online.

Format For #10 Window Envelope.

@LOGO  
 @CHURCHNAME  
 123 Main St.  
 Anytown, USA 12345

@FAMPREFFULLNAMES  
 @MEMBERADDRESS

@DATERANGE

@LINESWITHNOTES\_TAXDEDUCTIBLE  
 @SUBTOTALS\_TAXDEDUCTIBLE  
 @TOTAL\_TAXDEDUCTIBLE

No goods or services were received in exchange for these gifts. If you have any questions, please contact Lynette Stewart at LStewart@firstchurch.org or (555) 555-1234.

Mailing Label Name


Family Preferred Names - @FAMPREFFULLNAMES

Delete Save



# ChMS Sample

- Gift Details, Summary Totals, and a Grand Total are included.
- Using 'with notes' placeholder will print the Check Number and Notes.
- Suggest using a logo with a white background. It blends in much better.



**First Church**  
123 Main St.  
Anytown, USA 12345

George and Julie Adams  
6715 Watergrove Dr  
Memphis, TN 38119-8654

**Giving Period:** 01/01/2021 - 12/31/2021

Date	Fund	Amount	Notes
01/03/2021	General Offering	\$1,500.00	Check #4579
01/17/2021	General Offering	\$1,500.00	Check #4581
02/07/2021	General Offering	\$1,500.00	Check #4590
02/28/2021	General Offering	\$1,500.00	Check #4600
03/07/2021	General Offering	\$1,500.00	Check #4611
03/28/2021	General Offering	\$1,500.00	Check #4620
04/04/2021	General Offering	\$1,500.00	Check #4629
04/25/2021	General Offering	\$1,500.00	Check #4635
05/02/2021	General Offering	\$1,500.00	Check #4642
* General Offering:		\$13,500.00	
<b>Total:</b>		<b>\$13,500.00</b>	

No goods or services were received in exchange for these gifts. If you have any questions, please contact Lynette Stewart at [LStewart@firstchurch.org](mailto:LStewart@firstchurch.org) or (555) 555-1234.



# Email Template

- Settings > Giving > Giving Letter Email Template.
- Statement is a pdf document attached to this email.
- Customize using same method as Letter (Statement).

### Template Body

Email Subject Line

@CHURCHNAME Giving Statement

Body

**B I** | | | | | Format | | | Font | | Size | | Source

@LOGO

Dear @FAMILYNAMES,

Attached, you will find your giving statement from for @DATERANGE. Please retain this for tax purposes.

Thank you for your faithful giving!

[Save](#)

### Placeholders

@FIRSTNAME - The Individual's first name, or the n

@FULLNAME - The Individual's Formal Full Name of member. Ex: Dr. John R. Smith, Jr. Ex: John Smith

@PREFERREDNAME - The Individual's preferred na

@PREFERREDFULLNAME - The Individual's full nam

@FAMILYNAMES - The Family Greeting Name if it e John, Margaret, and Jack

@FAMILYFULLNAMES - The Family Label Name if it Ex: John Smith, Maggie Jones, and Jack Smith

@FAMPREFNAMES - The Family Greeting Name if it Margaret. Ex: John, Margaret, and Jack

@FAMPREFFULLNAMES - The Family Label Name if Smith

@DATE - The date on which the report is printed. E

@DATERANGE - The date range of the giving report

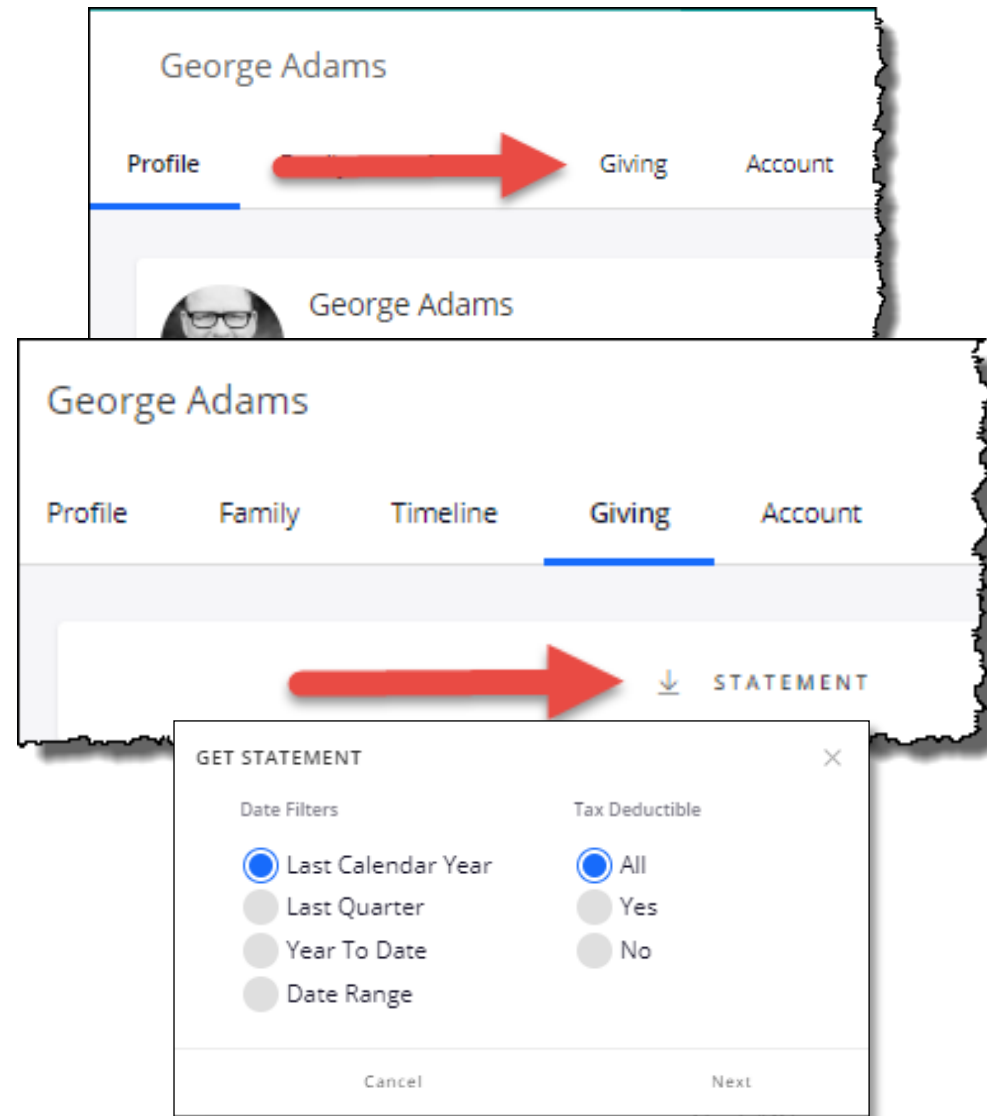
@LOGO - Your church's logo, as configured on the

@CHURCHNAME - Your church's name, as configu



# Test your Design

- Lookup a frequent donor and click on the Giving Tab.
- Choose to download or email statement.
- Choose Filters as needed.
- This is also how you print a statement for one person.



# Consolidating Family Giving

- This **MUST** be done before running statements.
- Occasionally gifts are posted to the NON-PRIMARY family member, such as a spouse and needs to be moved to the primary family member.
- This often happens when the non-primary spouse/partner uses a credit card with online giving. The money will be posted to their record instead of the primary.



The screenshot shows a table titled "Individuals" with the following data:

Name	User ID	Relationship	Group Giving With Family
George Adams ★	11	Husband	Yes
Julie Adams	12	Wife	Yes

# Correction using Consolidate Family Giving

- Settings > Giving > Consolidate Family Giving
- The list of names are **ONLY** those where gifts have been posted to the **Non-primary** family member **AND** they are marked **YES** for Group Giving.
- This Utility provides a quick and easy way to move monies to the primary family member.
- Select the Name(s) and click Go.

<input type="checkbox"/>	First Name	Last Name	User ID
<input checked="" type="checkbox"/>	Julie	Adams	12

Go

# Fine Tuning!



Though not required, before printing statements, you might want to customize using the following tips.

# How to include Titles or other custom Names

- To print names with Titles on statements, you'll need to use the Family Label Name.
- When running statements, the Family Label Name will be used instead of the Placeholders @FAMILYFULLNAMES or @FAMPREFFULLNAMES.

George Adams

Profile **Family** Account

Family Picture  
File must be smaller than 5MB and either PNG or JPG/JPEG.

Drop file here or [browse](#)

Family Label Name ⓘ  
Dr. & Mrs. George Adams  
Ex: Mr. John Smith & Dr. Kia Liu-Smith

Family Greeting ⓘ  
Bubba & Julie  
Ex: John and Dr. Kia

Cancel Save



# Pledge Balances

- To include pledges, and balances for **any active** pledges on the statement, use @PLEDGES Placeholder.

## Pledges

<b>Campaign</b>	<b>Pledged</b>	<b>This Statement</b>	<b>Prior</b>	<b>To Date</b>	<b>%</b>	<b>Balance</b>
2022 Budget Pledge	\$1,200.00	\$1,500.00	\$0.00	\$1,500.00	125%	(\$300.00)

# HTML

- Uses HTML codes for better placement of items and customization of the design such as...
  - <Center>
  - <Bold>
  - <font color>
  - <U> for underline
  - <HR> for Hard return
- For more help with HTML: <https://documentation.shelbynextchms.com/external/article/1417?l=37>

# HTML Statement Example

**Template Body** [Add a template](#)

```
<Center>@LOGO  
<B><font color="green">7345 Goodlett Farms Parkway  
Cordova, TN 38016</B></Center></font>  
  
&@FAMILYFULLNAMES Env # &@ENVELOPENUMBER  
&@MEMBERADDRESS <hr >  
  
<DIV Align=Right>&@DATERANGE</Div>  
  
&@PLEDGES  
  
<B><U><font color="blue">Record of Giving</B></U></font>  
&@LINES  
&@SUBTOTALS <hr>  
<B>&@TOTAL</B>  
  
<i>No goods or services were received in exchange for these gifts.</i>
```


MAILING LABEL NAME

Full Names - &@FULLNAME ▼

SAVE



# HTML Statement Results



**First Church**  
7345 Goodlett Farms Parkway  
Cordova, TN 38016

Allen and Ellen Adams Env # 15  
1158 Charles Bryan Rd  
Cordova, TN 38018-5641

---

Giving Period:

**Pledges**

Campaign	Pledged	This Statement	Prior To Date	%	Balance
Time to Build	\$720,000.00	\$0.00	\$0.00	0%	\$720,000.00
Time to Build	\$1,800.00	\$0.00	\$0.00	0%	\$1,800.00

[Record of Giving](#)

Date	Category	Amount	Notes
<input type="text"/>	General Giving	\$100.00	Check #2233

\* General Giving:                     \$100.00

**Total: \$100.00**

*No goods or services were received in exchange for these gifts. If you have any questions, please contact Lynette Stewart at [LStewart@firstchurch.org](mailto:LStewart@firstchurch.org) or (555) 555-1234.*



# ChMS Non-Cash Donations



- Donors may want the option to give through a Non-cash method such as stocks, IRAs, or Gift-in-kind.
- Per IRS Non-Cash gifts **ARE** tax-deductible to the donor but should not appear on the statement *where it totals to the cash donations*.
- The IRS requires a letter or form to the donor to acknowledge non-cash gifts.
- To exclude Non-Cash gifts from statements we create a Non-Tax-Deductible Category. We don't have an official Non-Cash method, so *this is a work-around*.

Settings

General Terminology Groups Profile Attendance Check-In Interactions **Giving**

Fund Name

Time to Build - Non Cash Stock

Active  
Active Funds show up when inputting giving.

Tax Deductible

Save Delete

You cannot delete this Fund, since it has giving tied to it.

# Sample Letter to Donor

Please consult your tax accountant or advisor for an appropriate donor letter or form for non-cash giving.



**First Church**  
123 Main St.  
Anytown, USA 12345

June 24, 2022

Mrs. Abigale Adams  
123 Main St.  
Birmingham, AL 35222

Dear Mrs. Adams:

This will acknowledge and express appreciation for your 2022 stock gift of 20 shares of Xcel Energy to First Church. This information should be given to your tax advisor for preparation of your tax return.

Thank you for your generous contributions which further the mission and ministry of God through First Church.

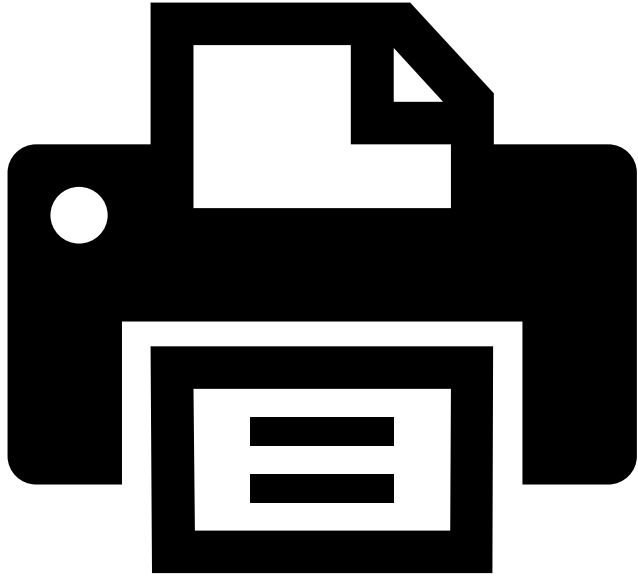
Faithfully,

Sharon Williams  
Staff Accountant

*No goods or services were provided by First Church in consideration, in whole or in part, for your contributions, which are used solely for the purpose of intangible religious benefit.*

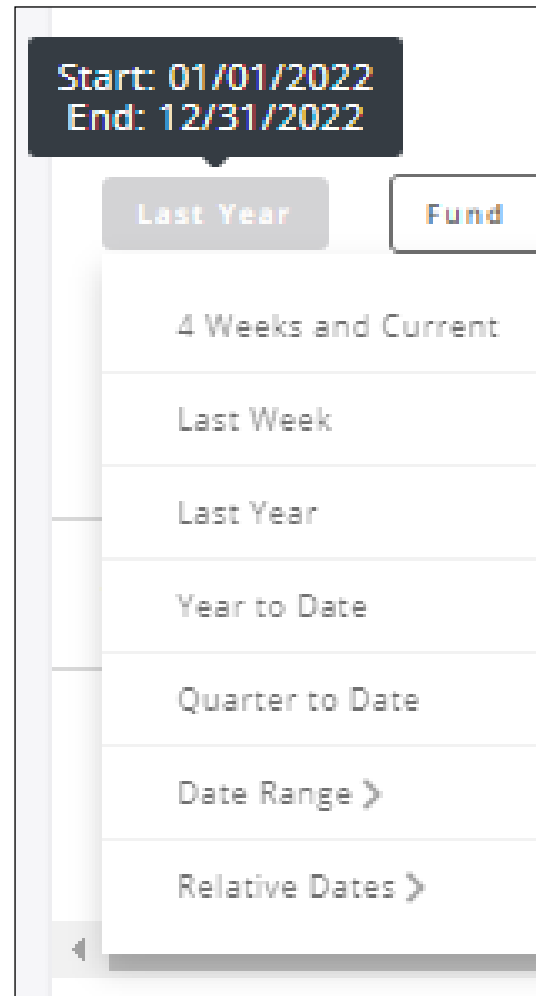


# Printing and Emailing Statements



# Filter - Date

- Reports > Giving > Detail
- Typically use Last Year but other options are available such as Quarter to Date and Date Range.




The screenshot shows a date filter interface. At the top, a dark box displays the selected date range: "Start: 01/01/2022" and "End: 12/31/2022". Below this, there are two buttons: "Last Year" (which is currently selected and highlighted in grey) and "Fund". A dropdown menu is open, listing several options: "4 Weeks and Current", "Last Week", "Last Year", "Year to Date", "Quarter to Date", "Date Range >", and "Relative Dates >". A scroll bar is visible on the left side of the dropdown menu.



# Filter – Categories (Funds)

- Optional
- Common to include all Categories.



A screenshot of a web application's filter interface for fund categories. At the top, there are three tabs: 'Fund' (selected), 'Group', and 'More Filter'. Below the tabs, a note states 'A \* denotes an inactive fund'. A search input field contains the word 'Filter'. Below the search field is a list of fund categories: '2022 Budget Pledge', 'General Offering', 'Time To Build', 'Benevolence', 'Home Missions', 'International Missions', 'Tuition Scholarship', 'Time To Build - Non Cash Stock', and 'Time To Build - Non-Cash IRA'.

# Filter – Group

- Optional
- Not common, but may need to filter by individuals who want statements by Email vs. Mailed

The screenshot shows a dialog box titled "Filter – Group". At the top, there are three buttons: "Group" (disabled), "More Filters", and "Apply". Below the buttons, the dialog is divided into two sections: "Views" and "Groups".

**Views:** A search box contains the text "Filter". Below it, two items are listed: "Youth Sunday School" and "Members".

**Groups:** A search box contains the text "stat". Below it, two items are listed: "How Received - Statement" and "Statement - Email", which has a checkmark next to it.

At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

# Filter – More Filters and Apply

- Optional.
- If statement design ONLY includes Tax-Deductible Placeholders, no need to use this filter..
- Only send to donors with gifts over a specific amount?
- Click Done then Apply when finished with selection.

More Filters Apply

Tax Deductible  
All

Source  
All

Include Anonymous  
No

First time givers only

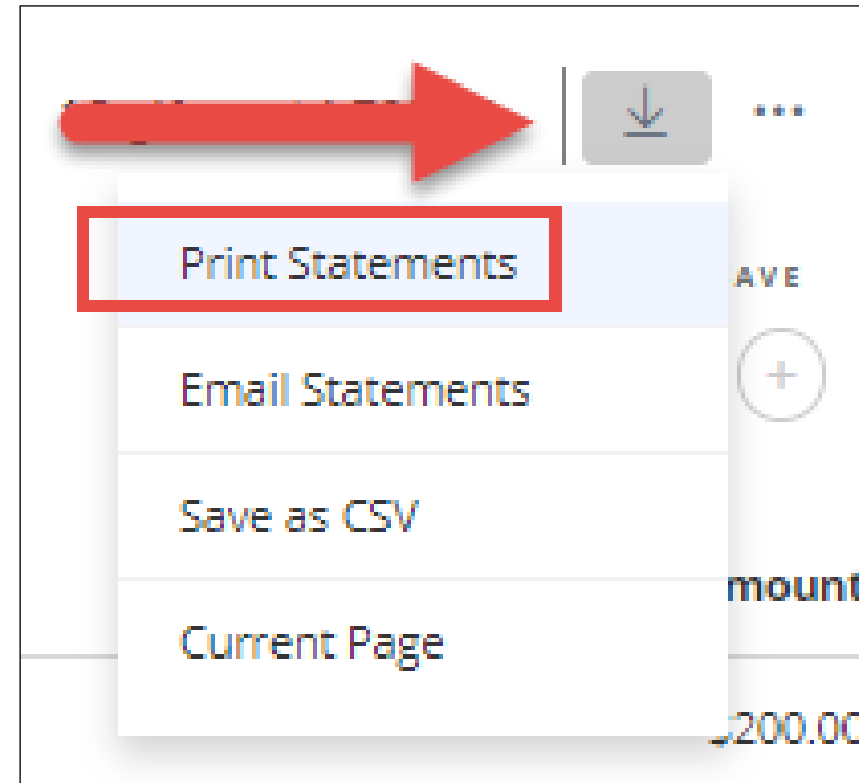
Individual Gifts  
 Total Gifts

Above or equal to: 50  
Below or equal to: \$1,000+

Cancel Done

# Print Statements

- Click on the down arrow.
- Choose Print Statements.
- Best Practice to create and save, for future reference, a full set of statements by year.



# Statement Options

- If more than one statement template, choose from menu.
- Choose Sort order.
- Include Pledge information for those ***"Even if they Made No Contributions During This Period"***.
- Click Go.

STATEMENTS OPTIONS

Default

@LOGO  
@CHURCHNAME  
123 Main St.  
Anytown, USA 12345

@FAMPREFFULLNAMES  
@MEMBERADDRESS

@DATERANGE

@LINESWITHNOTES\_TAXDEDUCTIBLE  
@SUBTOTALS\_TAXDEDUCTIBLE  
@TOTAL\_TAXDEDUCTIBLE

STATEMENTS OPTIONS

@PLEDGES

No goods or services were received in exchange for these gifts. If you have any questions, please contact Lynette Stewart at LStewart@firstchurch.org or (555) 555-1234.

Name line on Mailing Labels

Family Preferred Names

Sort By Name  Sort By Zip Code

Include All Individuals With Active Pledges, Even If They Made No Contributions During This Period.

You may edit and add giving templates at [Giving Template Settings](#)

Go

# Printing Options

- Check if anyone doesn't have a mailing address. Use the 'Statements for Individuals with No Address' if you want to print them.
- Click Mailable Labels, if needed.
- Click Mailable Statements. PDF Statements will now print for those selected.

There is one Individual who does not have a mailing address.

[Frank Landry](#)

[Statements for Individuals with No Address](#)

You can download the giving statements and mailing labels for the **15 Individuals** who gave between **01/01/2022** and **12/31/2022**

[Mailable Labels \(Avery 5160\)](#) [Mailable Statements](#)



# Emailing Statements

- Reports > Giving > Detail
- Filter as needed.
- Click on Down Arrow.
- Choose **Email Statements**.
- Choose the Statement Options.
- Print Statements and Labels for those without email addresses.
- Click **Send Emails** to email statements.

Overview Summary Detail By Anonymous Batches Pledges Demographics

There are  Individuals who do not have an email address. Below, you can download a printable version of their report and address labels so you can mail their statements.

[Mailable Labels \(Avery 5160\)](#) [Mailable Statements](#)

Are you sure you want to email giving statements to the  Individuals who gave between **01/01/2022** and **12/31/2022**?

For families with grouped giving, emails will be sent to the Primary family member and spouse.

[Send Emails](#)

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Click on a Title to Watch NOW	Presented
<a href="#">Working to Make Your Organization More Recession Resistant)</a>	11/16/2022 <a href="#">Slides</a>
<a href="#">Important Year-End Information - eFiling (W2s and 1099s)</a>	10/12/2022 <a href="#">Slides</a>
<a href="#">Making, Tracking, and Reporting Budgets</a>	09/27/2022 <a href="#">Slides</a>
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The next Advance Your Knowledge webinar

# **Bank Account Reconciliation: Reconciling to Your Bank and to your Books**

**Wednesday, February 22, 2023  
2:00 pm Central**

**Led by Consultants:  
Carmen Dea  
Mark Crain**

[Sign up today](#)

