

# SHELBY SYSTEMS®


## Advance Your Knowledge


## Webinar Series

# Processing Contribution Statements

**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.

 *\*The webinar is being recorded\**

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Advance Your Knowledge

# Presenters

Mark Crain | Staff Trainer



ChMS Giving



Staci Sampson | Staff Trainer



Arena Contributions

**SHELBY**SYSTEMS®

# ShelbyNext | Membership (ChMS) vs. Arena

Both are record-keeping database solutions for tracking people, gifts, attendance, communications and much more.

**ShelbyNext | Membership (ChMS)** is the latest in offerings for church/nonprofit management systems. It provides simple yet robust methods for engaging with congregants.

**Arena** is a highly customized system that churches, or conference headquarters have used for many years. There are two levels of software customization, Select and Premium.

# ChMS: Giving Letters



- Templates
- Email vs Mailed
- Single Statements
- Corrections

First Church †  
7345 Goodlett Farms Parkway  
Cordova, TN 38016

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

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Giving Period: 01/01/2020 - 12/31/2020

**Pledges**

Campaign	Pledged	This Statement	Prior To Date	%	Balance
Tithe 2019 Pledge	\$1,300.00	\$0.00	\$200.00	15%	\$1,100.00

**Record of Giving**

Date	Category	Amount	Tax Deductible
01/27/2020	Tithe 2020 Pledge	\$50.00	Yes
02/17/2020	Tithe 2020 Pledge	\$50.00	Yes
02/24/2020	Tithe 2020 Pledge	\$50.00	Yes
03/10/2020	Tithe 2020 Pledge	\$50.00	Yes
08/22/2020	Tithe 2020 Pledge	\$50.00	Yes
09/12/2020	Tithe 2020 Pledge	\$50.00	Yes
09/19/2020	Tithe 2020 Pledge	\$50.00	Yes
10/04/2020	Tithe 2020 Pledge	\$50.00	Yes

**Subtotals:**

\* Tithe 2020 Pledge: \$400.00

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**Total: \$400.00**

*No goods or services were received in exchange for these gifts.*

Pembroke Church Giving Statement

PC [Redacted]

giving\_statement.pdf  
14 KB

Attached, you will find your giving statement from Pembroke Church for Giving Period: 01/01/2019 - 12/31/2019. Please retain this for tax purposes.

# Arena: Contribution Statements

- Multiple Templates to pick from
- Email or Print options for running statements
- Premium version: Ability to edit report with images and set parameters
- Incorrect classification of donations
  - Person
  - Amount
  - Category

Shelby Financials  
7345 Goodlett Farms Pkwy  
Cordova TN 38016-4990

Mr. Don Ellis  
PO Box 905327  
Charlotte NC 28290-5327


Contribution Statement for Mr. Don Ellis				Giving from 1/1/2020 to 12/31/2020 Total Tax-Deductible Gifts: \$800.00			
<b>Tax-Deductible Gifts</b>							
Date	Pledged Giving	General	Missions	Benvelonce	Other	Check / Trans. #	Gift Total
1/26/2020	\$400.00					520	\$400.00
2/2/2020	\$400.00					520	\$400.00
<b>Total:</b>	<b>\$800.00</b>						<b>\$800.00</b>
<b>Pledge Summary</b>							
Fund	Pledge Amount	Prior Year	Current Year: Cash	Non-Cash	Balance		
20987654PLEDGE	\$2,600.00	\$0.00	\$800.00	\$0.00	\$1,800.00		
<b>Fund Summary</b>							
Fund			Non-Cash	Cash	Total		
20987654PLEDGE			\$0.00	\$800.00	\$800.00		
<b>Total:</b>			<b>\$0.00</b>	<b>\$800.00</b>	<b>\$800.00</b>		

# Arena Hub

Check Arena Hub for updates to  
Contribution reports

**OR**

Install Contribution reports for the  
first time.



**Reports Contribution With  
Five Fund Columns**

Version 5.9.1  
Installed 5.9.1  
Allows a customer to add a  
contribution statement  
report with up to five sets of  
funds in separate columns of  
the output.

[Uninstall](#)

[Refresh](#)



# SQL Server Reporting Services (Arena)

- Default Funds
- Preset dates
- Preset Fund Labels
- Allows customization of statements in Report Builder

SQL Server Reporting Services

★ Favorites Browse

Manage ContributionStatementsFiveFunds

Home > Arena > Contributions > ContributionStatementsFiveFunds > Manage > Parameters

Name ^	Data type	Visibility	Prompt	Use default	Default value
ActiveOnly	Integer	Hidden		<input checked="" type="checkbox"/>	0 <input type="checkbox"/> Null
AdjustmentTypes	Text	Visible	Adjustment Types to Print	<input checked="" type="checkbox"/>	None Selected
Campus	Integer	Visible	Campus	<input checked="" type="checkbox"/>	All
Chapter	Integer	Visible	Chapter	<input checked="" type="checkbox"/>	0
ChapterSize	Integer	Hidden		<input checked="" type="checkbox"/>	400
CheckUsage	Integer	Hidden		<input checked="" type="checkbox"/>	0
Column1Label	Text	Visible	Column 1 Label	<input checked="" type="checkbox"/>	Default Label
Column2Label	Text	Visible	Column 2 Label	<input checked="" type="checkbox"/>	Default Label
Column3Label	Text	Visible	Column 3 Label	<input checked="" type="checkbox"/>	Default Label
Column4Label	Text	Visible	Column 4 Label	<input checked="" type="checkbox"/>	Default Label
Column5Label	Text	Visible	Column 5 Label	<input checked="" type="checkbox"/>	Default Label
ExecutionID	Text	Hidden		<input checked="" type="checkbox"/>	-1 <input type="checkbox"/> Null
FromDate	Date/time	Visible	From Date	<input type="checkbox"/>	
FundCategories	Text	Visible	Fund Category	<input checked="" type="checkbox"/>	Expression-based <a href="#">Override</a>
FundID1	Integer	Hidden		<input checked="" type="checkbox"/>	-1

# Editing Emails for Statements (Arena)

1. Go to **Administration** tab.
2. Click on **System Emails** under *Customize*.
3. From the **Type** dropdown, select **Agent | Contribution Statement Email**.

Customize the email's From, From Email, Reply to Email, Subject, and Message. You can use **Merge Fields** to auto fill items, such as names.

**Manage System Templates**  
Select the email you wish to modify. Leaving an empty From/From Email will result in the default organization setting email.

**Type** Agent | Contribution Statement Email

From

From Email

CC

BCC

Reply To Email

Subject

**Communication Content**

HTML Message Plain Text Message

Use this HTML editor to format your email message.

Merge Fields



# Running Contribution Statements (Arena)

## Email statements

- Use a public list to select people who will receive an email statement
- Make sure in **Module Settings** the right contribution statement report is connected.

## Print Statements

- Five Fund
- Simple Statement
- Can run a single statement by the **Contribution** tab on an Individual records or by the **Person Guid** in preferred contribution statement

# Tips & Tricks

- Received Qualified Distribution (*Direct from custodian*)
  - [Sample IRA Qualified Charitable Distribution Gift Acknowledgment - ECFA.church](#)
  - [IRA Direct Charitable Contributions - ECFA.church](#)
- Running a single statement
- Finalize all giving from 2020 and Export (Post) to GL
- Non-Cash gifts
  - [ChMS](#)

*\*Recommended to speak with qualified legal/financial professional for individual application of advice given here\**

# Shelby Systems Training Resources

- [shelbysystems.com/learn/training](http://shelbysystems.com/learn/training) for more training resources
- For personalized training with one of our Trainers contact [Rhonda.Putt@Shelbyinc.com](mailto:Rhonda.Putt@Shelbyinc.com) or call 1-800-654-1605
- Shelby Support: 1 (888) 697-4352
- [training@shelbyinc.com](mailto:training@shelbyinc.com)
- [help.shelbyinc.com/financials](http://help.shelbyinc.com/financials)
- [community.shelbysystems.com](http://community.shelbysystems.com)
- <http://myapplication.help/YearEndResources/index.htm>