



Contribution Statements

Contribution Statements are generated for your donors; one statement per donor, pulling the donation criteria you choose. Statements can be both printed and emailed (as PDF attachment).

Print Statements

Reports > Donation Activity > Contribution Statements

Contribution Statement

Date of Donation
Start: 1/1/2013
End: 12/31/2013

Donation Type: All items checked
Campaign: All items checked
Appeal: All items checked
Accounting Code: All items checked

DataMiner Batch: Limit Contacts by Selecting Batch ...
(Note: DataMiner Platinum Batch must only have 1 record per contact)

Order By: Last Name, First Name Zip, Last Name, First Name

Main Contact Label: Envelope Line 1

Show \$\$\$ Columns: Contribution Amount, Value Rec'd, Tax Deduction Contribution Amount

Portrait Landscape

Field 1: Type
Field 2: Campaign
Field 3: Appeal
Field 4: Accounting Code

PDF Report Export Address Data to Excel

Select your Criteria:

- Limit the date-range
- Filter specific DonationTypes or Appeal Codes
- Change your Sort Order
- **Main Contact:** Change to **Acknowledgement**, which is the standard for most organizations
- Show Columns:
 - The default will print the donation amount, Value Received, and Tax Deductible. Great for Event Tickets and Auctions where you have a value received.
 - If you do not have events or auctions, change to only print the Contribution Amount
- List the fields you'd like to see on the Report.

This will generate a large PDF file (viewable with Adobe Reader); **one page per donor**, that you can then print & drop in the mail.



Customize the Header Lines

Maintenance > Site-Setup > Site-Information

The top FIVE fields of your Site Name & Address are pulled in to the Contribution Statements.

While the titles of the fields say "Address 1-2-3", you can put whatever information you want in those fields, such as Tax ID#, Website, Email, etc. The field names do not carry to the statement.

You cannot upload logos or images to the Contribution Statement.

Use DataMiner Batches

Contribution Statements allow you to filter DonationTypes and Date-Ranges, but what if you want to take that a step-further?

Create a report in **DataMinerPlatinum**. For example, only those who donated \$100 or more in 2012.

Once that report is created and saved, now when you go to run Contribution Statements, select **DataMinerBatch** to select the created report, and generate statements only for that criteria.

Contribution Statement

Date of Donation		Donation Type: <input type="text" value="All items checked"/>
Start: <input type="text" value="1/1/2013"/>		Campaign: <input type="text" value="All items checked"/>
End: <input type="text" value="12/31/2013"/>		Appeal: <input type="text" value="All items checked"/>
DataMiner Batch: <input type="text" value="Limit Contacts by Selecting Batch ..."/>		Accounting Code: <input type="text" value="All items checked"/>

(Note: DataMiner Platinum Batch must only have 1 record per contact)

Order By: Last Name, First Name Zip, Last Name, First Name

Main Contact Label:

Show \$\$\$ Columns: Contribution Amount, Value Rec'd, Tax Deduction Contribution Amount

Portrait Landscape

Field 1:

Field 2:

Field 3:

Field 4:

PDF Report Export Address Data to Excel



Email Contribution Statements

Processing > Contribution Statement Email

Note: If you do not see this under the processing menu, Your User does not have the security to access this menu option. You or your administrator, go to **Maintenance > User-Setup, select the desired User, click the **Rights** tab at the top of the page. Click **Edit**. On the left lists the various parts of the program, scroll down to the Processing menu and **Check** the box next to Contribution Statement Email.

This process will generate stock, merged (*for example, will say "Dear Bob"*) emails to your donors. Contribution Statement will be attached as a PDF, and appear the same as the printed statements do under Reports > Donation Activity > Contribution Statements.

The screenshot shows the 'E-Mail Contribution Statements' interface. The page title is 'E-Mail Contribution Statements' and the status is 'Current Statement --> No Records'. The interface includes a navigation bar with 'Statement Listing', 'E-Mail Settings', 'Donation Filters', 'Create PDF Statements', 'Records', and 'Sent'. Below the navigation bar are buttons for 'Clear Filters', 'Clear Sort', and 'Add'. A table header shows columns for Listing #, Name, E-Mail Method, Processing Statements, Total Statements, Statements Processed, Sending E-Mails, E-Mails Sent, and Delete. The main content area has a 'Copy form #' field, a 'Template' dropdown menu, a 'Name' field with 'Testing Tuesday', and a 'Use Contact E-Mail Address' dropdown menu. Below these is a rich text editor for the 'Statement Report Footer Comment' with a toolbar and 'Design', 'HTML', and 'Preview' buttons. At the bottom left are 'Insert' and 'Cancel' buttons.

1. Click **Add**.
2. **Name** your BATCH of emails (*such as All, or Testing, or Donations Over 100*)
3. You can add **FOUR** sentences as a footer to the Contribution Statement. This footer will be the same for each statement. Type this in the **Footer** box.
4. Click **Insert**.



DonorSnap

Donor Management Made Easy

E-Mail Contribution Statements
Current Statement --> 1 - Testing Tuesday

Statement Listing | E-Mail Settings | Donation Filters | Create PDF Statements | Records | Sent

Save | Cancel Changes

E-Mail Statement Setup:

From E-Mail:

(Note: If 'From E-Mail Address' is empty, the donor will receive an E-Mail from 'no_reply@donorsnap.com')

Subject Line: Contribution Statement

Message (Body):

Font Name | Real... | A | B | I | U | | | | | | | | | | | | | | | |

Note: Drag drop Fields to editor.

- AccountingCode
- Acknowledgement
- Active
- Address1
- Address2
- Address3
- Anniversary
- Anonymous
- Birthdate
- Cell
- Cell 2
- Child Name1
- Child Name2
- Church
- City
- Company
- ContactComments

Design | HTML | Preview

1. Customize your email on the **Email Settings** tab.
2. Type a **From** address (in case they reply); or it will be sent from the no_reply@donorsnap.com email address
3. Customize the Subject Line
4. Type the **Message** of your email.
5. To the right are all **Contact** fields. Drag into the message to “merge” with your email.
For example, Dear <Salutation>
6. Click **Save**.

E-Mail Contribution Statements
Current Statement --> 1 - Testing Tuesday

Statement Listing | E-Mail Settings | Donation Filters | Create PDF Statements | Records | Sent

Save | Cancel Changes

Date of Donation

Start: 1/1/2013

End: 12/31/2013

DataMiner Batch: Limit Contacts by Selecting Batch ...
(Note: DataMiner Platinum Batch must only have 1 record per contact)

Donation Type: All items checked

Campaign: All items checked

Appeal: All items checked

Accounting Code: All items checked

Main Contact Label: Envelope Line 1

Show \$\$\$ Columns: Contribution Amount, Value Rec'd, Tax Deduction Contribution Amount

Orientation: Portrait Landscape

Field 1: Type

Field 2: Campaign

Field 3: Appeal

1. Use the **Donation Filters** tab to set your criteria of WHOM to send statements to.
2. This is the same as the printed statements (Reports > Donation Activity > Contribution Statements). See above
3. Select your criteria (including DataMinerBatch option). Click **Save**.



Page Help How to Video

E-Mail Contribution Statements
Current Statement --> 1 - Testing Tuesday

Statement Listing E-Mail Settings Donation Filters **Create PDF Statements** Records Sent

Create Statements

Contribution Statements Process Monitor

Statements being Processed: 13 of 13

Status: 12:00:18 AM: Started Building Statements
12:00:22 AM: Completed Statement PDF
12:00:22 AM: Processing completed in 3.15625 seconds

1. Create PDF Statements by clicking the box at the top of the tab.
2. This will generate **one PDF per donor**, which will then be attached to their email. If you are doing small batches, such as my example of 13, it will only take a few seconds, listing the status when is completed.
3. If you are processing a large batch, for example 2000 statements, it might take considerably longer (even over an hour or two). Start the process by clicking the **Create Statements** button. You can leave the page; You can leave the program. Check back periodically for the status.

If you leave the page, when you return to check on the status of the Processing Statements, you only need to return to the **Listing tab**.

Page Help How to Video

E-Mail Contribution Statements
Current Statement --> 1 - Testing Tuesday

Statement Listing E-Mail Settings Donation Filters **Create PDF Statements** Records Sent

Clear Filters Clear Sort Add Currently Showing Items 1 to 1 of 1

Listing #	Name	E-Mail Method	Processing Statements	Total Statements	Statements Processed	Sending E-Mails	E-Mails Sent	Delete
1	Testing Tuesday	E-Mail, E-Mail2, PrimaryPersonaEMail	No	13	13	No	0	

Page size: 15

For your batch, the Listing page will show how many statements are included in the batch, how many have been processed, and **Yes** if it is still processing statements.



DonorSnap

Donor Management Made Easy

Contact #	Send To E-Mail	Last Name	First Name	Company	Acknowledgement	Contribution Statement
<input type="checkbox"/>		Allen	Jennifer	Allen Automotive	Jennifer Allen	PDF
<input checked="" type="checkbox"/>	drmmiles@email.com	Anderson	Miles		Dr. Miles Anderson	PDF
<input type="checkbox"/>		Bell	Jordan		Jordan Bell	PDF
<input checked="" type="checkbox"/>	gwenbradley@gmail.com	Bradley	Gwen		Mr. Gwen Bradley	PDF
<input checked="" type="checkbox"/>	paulbrown@email.com	Brown	Paul and Irene		Mr. Paul and Irene Brown	PDF
<input type="checkbox"/>		Clark	Gregg & Pauletta		Mr. Gregg & Pauletta Clark	PDF
<input type="checkbox"/>		Dekle	Rhys		Mr. Rhys Dekle	PDF
<input type="checkbox"/>		Hyatt	Jeremy		Jeremy Hyatt	PDF
<input type="checkbox"/>		Martin	James		James Martin	PDF
<input type="checkbox"/>		Perry	Michael & Joanna		Mr. Michael & Joanna Perry	PDF
<input type="checkbox"/>		Price	Dan		Dan Price	PDF
<input type="checkbox"/>		Smith	Jim		Mr. Jim Smith & Theresa Jones	PDF
<input type="checkbox"/>		Van Kirk	Beau	Van Kirk Professionals	Beau Van Kirk	PDF

1. The **Records** tab is the final step to pick & choose who receives statements, and to Send.
2. My batch is listing out the **13** records included in that batch. Notice to the left, that the program has only checked those names that have **Email Address** in their record (only those with email addresses on their contact screen can be sent email contribution statements). So while I have 13 in my batch, only 3 will receive an email.
3. Click on an individual on the list, click the **PreviewEmail** button.
 - a. This will give you a Preview of the email to be sent to that Individual.
 - b. You can choose from that point to send only that email to that individual.
 - c. Choose to send a **Test** email to yourself.
4. Click on an individual on the list, click the **PDF** button to view their PDF statement.
5. When you've decided all the information on this screen is correct and you are ready to generate emails, click the **Send Contribution Statements Email** BLUE button in the top Right corner.

The **Sent** tab will show all emails sent from that batch. You can re-send an email from here if needed.

******Once one email has been sent from a batch you cannot make changes to that batch (statement footer, criteria, etc.)******