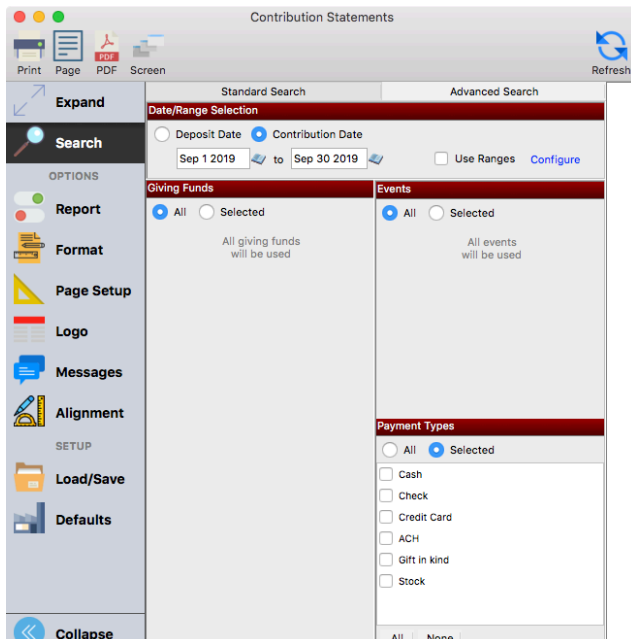# Contribution Statements

CDM+ enables your organization to be good stewards of the financial resources trusted to it. The option to provide contributors with timely and accurate Contribution Statements remains a high priority for you. This class will demonstrate how to generate those statements required in a variety of formats: printed statements, email statements, and receipts.

Determining the Content of Statements/Receipts

Date/Range Selection

Select the contributions to include on the statement by choosing either the **Deposit Date** or **Contribution Date**. For tax purposes, Contribution Statements should be generated based on the Contribution Date, not the Deposit Date. Then enter the date range to include in the report. For tax purposes, Contribution Statements should be generated based on the Contribution Date, not the Deposit Date

The basic configuration of contributions statements is to produce a statement for only those giving units that have **contributed** within the date selected.

If you wish to print statements for all giving units, *whether they have given or not*, check the **Use Ranges** box and click the **Configure** button.

Click the **Range** radio button on the Configure Ranges window. Enter 0.00 to 99999999.99, or something that exceeds your top giver's total. This will result in statements printing for basically all giving units, unless the Giving Unit Record is marked to not receive a statement.

Configure Ranges – when you check **Use Ranges** and enter the low and high end of the range you wish to print statements for, you have 3 options to select from:

1. Calculate range on any single breakdown item – this bases the range selection on any single entry line (Giving Fund).
2. Calculate range on total contribution – bases the range selection on total of any single contribution, regardless of fund split.
3. Calculate range on report date selection – bases the range selection on total of giving within date selection.

For example, Robert Jones gives $400 total and you enter one entry splitting the gift as $200 to General and $200 to Building. Robert Jones also has previously given $50 on 1/1 and $100 on 3/31.

If you configure your range selection to include $250 - $999,999.99, option 1 would not include this gift nor any other gift – he would not have a statement produced. Option 2 would include this gift, but would not include the other two gifts. Option 3 would include this gift, and would include the other two gifts since the grand total ($550) was within the range.
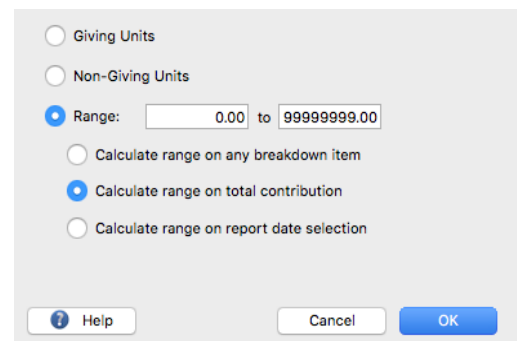
Giving Funds

Be careful in your selection in this area. This is a major change from prior versions of CDM+.

The **All** radio button at the top of the Giving Funds sections applies to every giving fund defined in CDM+ Contributions, including those that are flagged as inactive on the Giving Funds window. In short and in this case – all means all.

If you do not want to include all inactive funds in your report, you must have the **Selected** radio button active.

The list of Giving Funds below the **All** and **Selected** radio buttons is, by default, all the Giving Funds that you have not marked as inactive.

So, if your goal is to include all Giving Funds except those flagged as inactive, here are the steps you need to take:

1. Click on the **Selected** radio button.
2. Make sure there is no check mark in the box next to **Show inactive** below the list.
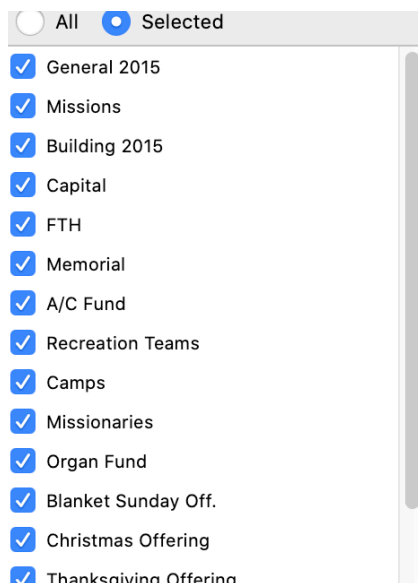
NOTE: Inactive Giving Funds will be marked in the list with an asterisk (*), as noted next to A/C Fund in the image to the left.

3.   Click on the small **All** button below the list of Giving funds. This will put a check mark next to all listed Giving Funds.

If you want your report to include only some of your active Giving Funds, take these steps:

1. Click on the **Selected** radio button.
2. Make sure there is no check mark in the box next to **Show inactive** below the list.
3. Click the small **None** button at the bottom of the list to clear any existing check marks.
4. Scroll down the list of Giving Funds, checking only the ones you want to appear on the report.

To include some inactive Giving Funds in your report, take these steps:

1. Click on the **Selected** radio button.
2. Put a check mark in the box next to **Show inactive** below the list.
3. Click the small **None** button at the bottom of the list to clear any existing check marks.
4. Scroll down the list of Giving Funds, checking only the ones you want to appear on the report.

NOTE: Inactive Giving Funds will be marked in the list with an asterisk (*), as noted next to A/C Fund in the image to the right.
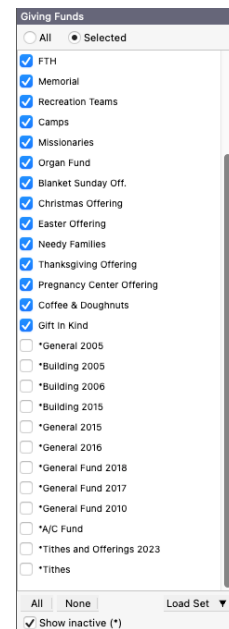
Event

If you enter contributions by Events, leave the selection set to **All**. If you only want to include certain Events, click the **Selected** button in this section and ensure that you check the appropriate Event Code(s).

Payment Types

For Statements and Receipts, you would generally leave **All** selected under Payment Type so all payment types will be included. For some other Contribution Reports, you may wish to see a report of just contributions paid by ACH, credit cards, or checks.

Contribution Statements (Column Format)

▶**Contribution Reports** ▶**Statements/Receipts** ▶**Contribution Statements**

Report tab: determines who and what will be printed on the contributions statement.

Giving Unit Options: If you wish to print statements for members that have Pledged and have not given, place a check mark in **Print only Giving Units with a pledge record** and under Search. Check "Use Ranges" in the Contribution Ranges section. Then, click **Configure** and check **Non-Givers**. This will result in statements printing for those few people that have a pledge, but who haven't contributed.

Include: By default, a Contributions Statement WILL NOT be printed for those giving units marked as Inactive, "Does not Receive Statement," or marked to receive an email statement; if a printed statement is desired for any of these groups, check the appropriate box(es).
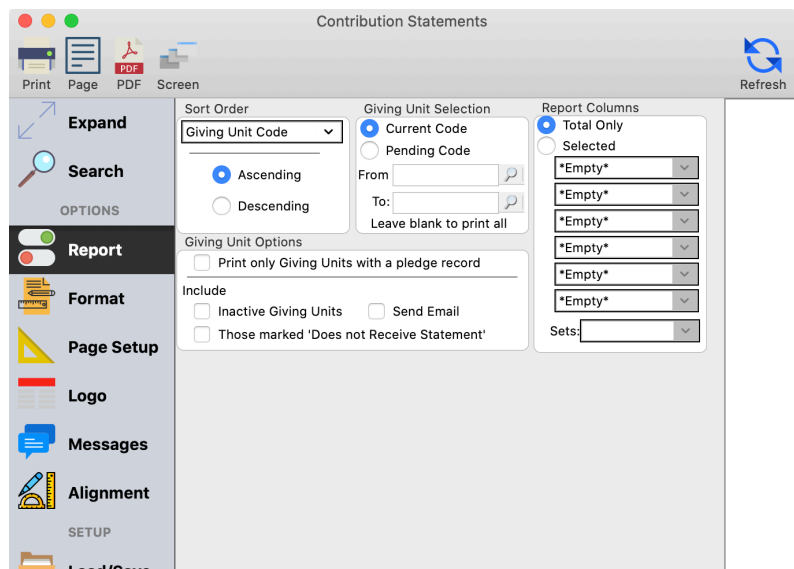
Format tab: Choices on this tab determine how the information is presented on the statement.

Print Options:

Select options to be included on the statement, but it is recommended to always select Print Date Range

Giving Unit: Select which Giving Unit **Name** format to use and an **Address Option** – Primary, Alternative, Current, or None.

Giving Unit Code: Select Current.

Pledge Information: If you record pledges, check the **Show Pledge Info** box and then check the desired pledge information figures to include.

Total Options: without checking either of these boxes, each date that a member has contributed within the specified date range will be listed. If a member gave each week during the year, along with other times during the date range, they would have in excess of 52 detail lines printed, causing the statement to span multiple pages.

You may reduce this is some cases by checking the **Quarterly Totals** checkbox. You will specify which quarter you wish to detail. For example, selecting the 3rd Quarter will result in the detail area listing all contributions made between 7/1 and 9/30. The total section will list totals by quarter – 1st Quarter, 2nd Quarter, and so on.

Also, you may elect to not print any detail information, only providing total information by checking the **Print Totals Only** checkbox.

Please note that by using either of these two options, you may not fulfill the IRS requirement for single gifts of $250 or more.

Messages tab: This report setup window tab, unique to Contributions Statements, is where you enter any message you wish to have appear on all contributions statements. If you are electing to print contributions statements for those giving units that have not made contributions in the desired date range, you may specify one message for those that have contributed and a different message for those that have not contributed.

Total Descriptions: Enter the terms that you want to appear in the totals area for deductible and non-deductible giving. If you leave these blank, a single colon (:) will appear.

Alignment tab: If double window envelopes are to be used in mailing Contribution Statements, set up the spacing as shown (a: 0.65, b: 0.65, c: 1.70, d: 2.75).

Page Setup tab: Set paper size, orientation, and margins. The recommended top margin is 0.90 inches and the bottom margin is 0.25 inches for Contribution Statements that will be mailed in double window envelopes.

The above settings will fit most common double window envelopes. Print one contributions statement as a trial. If necessary, tweak the settings on Alignment and Page Setup tabs so both the Church Address and
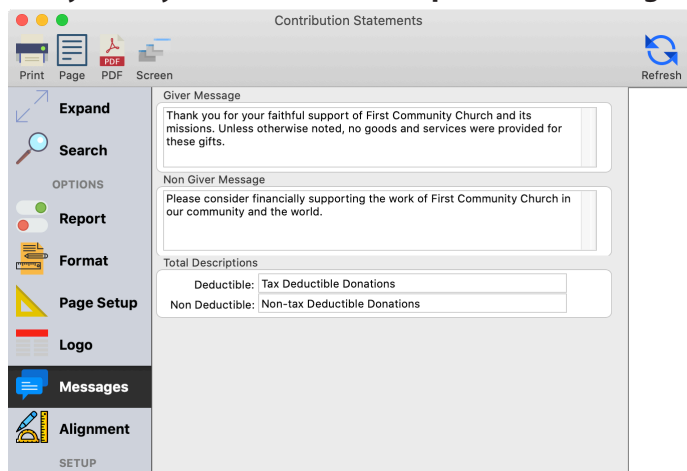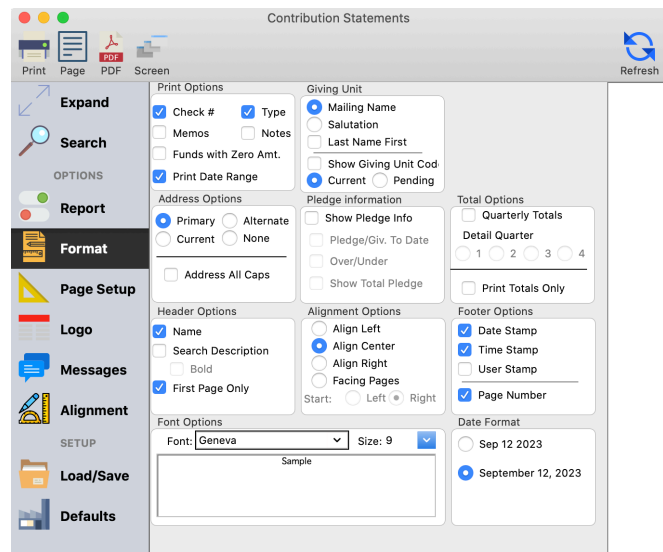
Giver Address show in the envelope windows.

Once you have the proper settings for your double window envelopes, we recommend you click the **Load/Save Report** button and save this report.

Logo: A logo, church letterhead, or watermark can be added to your contribution statements. See the section in Chapter 1 Fundamentals of CDM+ for steps on how to add a logo to most reports in CDM+.
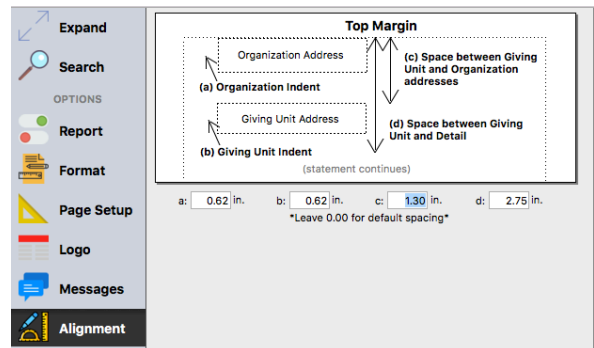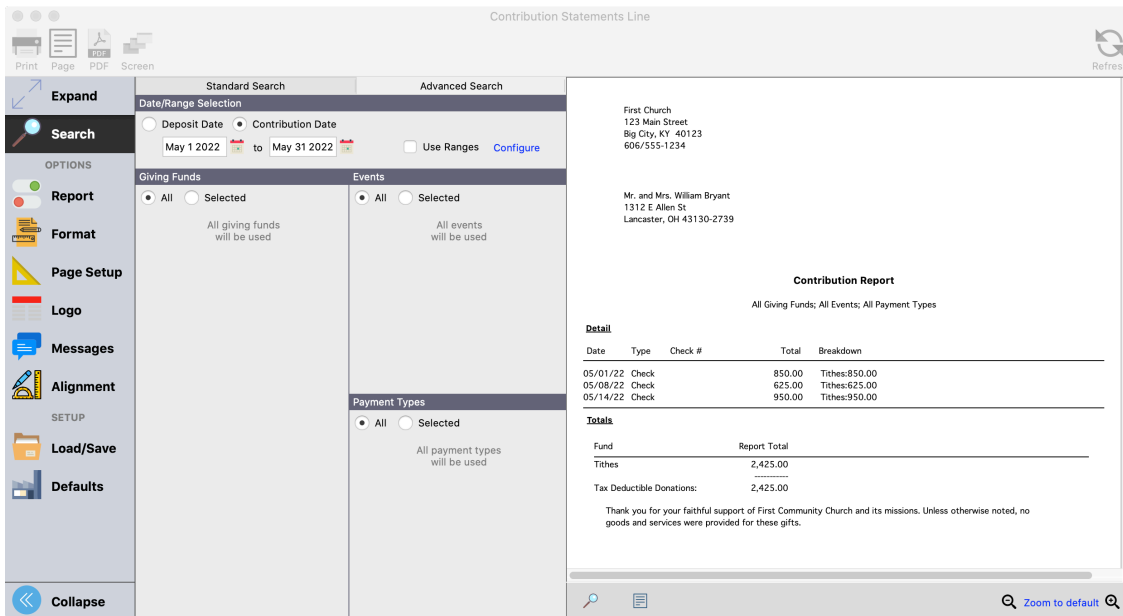

Contribution Statements - Line

▶**Reports** ▶**Contributions Reports** ▶**Statements/Receipts** ▶**Contribution Statements Line**

The Line format of Contributions Statements is set up just as the standard column format, except that on the Format tab you do not choose columns to include on the report.
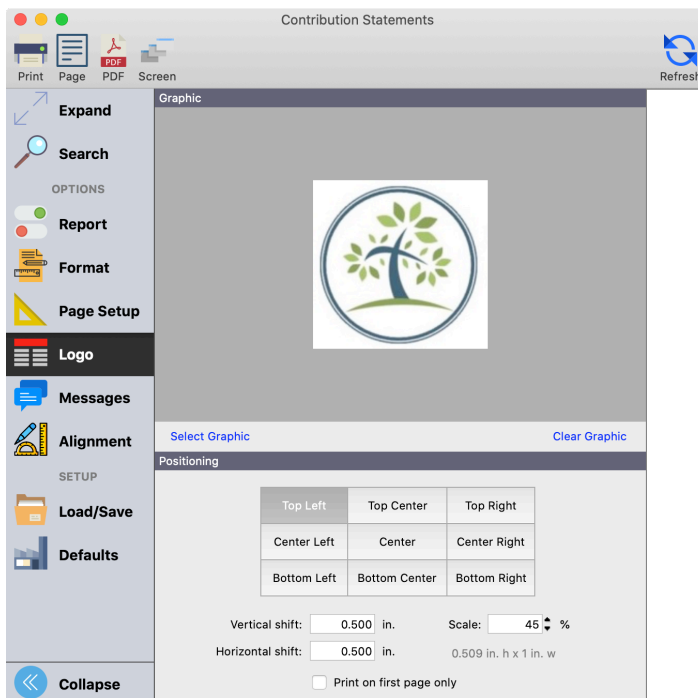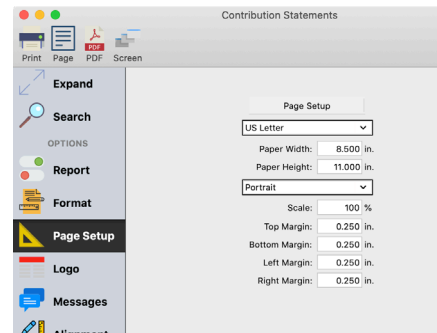
Contribution Statements – Email (or Line Email)

Email Statement Setup

Email Contributions Statements provide the accuracy of all CDM+ statements with the efficiency and convenience of email. In order to use Email Statements, some setup in CDM+ System Preferences must be completed. Follow this path to verify these settings are complete for your database:

▶**CDM+ (macOS)/File (Windows)** ▶**Preferences** ▶**CDM+ System** ▶**General** tab ▶**Sys. Email**
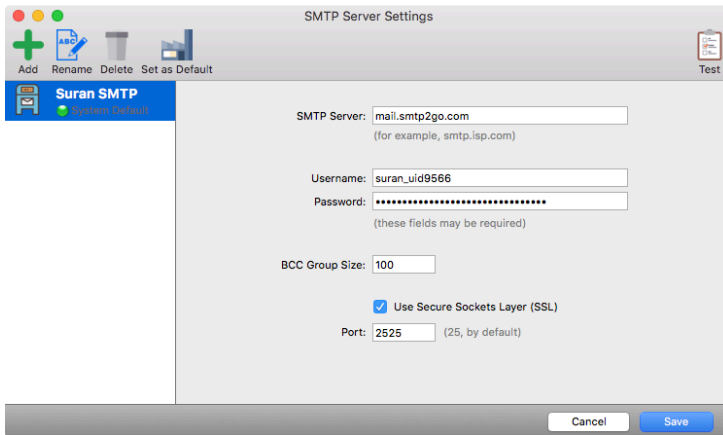
Click on the **Sys. Email** icon to open the System Email window. Click on the **Manage SMTP Servers** button to add server settings. These settings are required for all use of email via CDM+. Multiple servers settings may be entered.

Two steps must be completed to identify the Giving Units that will receive Email Contribution Statements.

▶**Program** ▶**Contributions** ▶**Giving Unit Records**

First, on the Giving Unit Record Information tab, check the **Email Statement** box in the Giver's Name section. This marks the record to receive an Email statement and not print a paper copy of the Contributions Statement (a paper copy can still be printed by overriding this default).
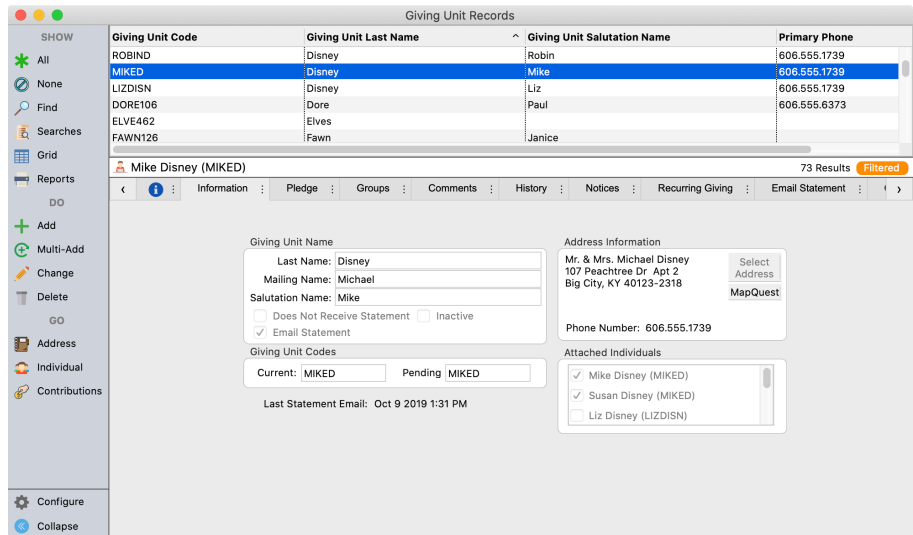
Second, on the Email Statement tab of the Giving Unit record, put a check mark in the **Use** column to mark the email address(es) that should receive an Email Contribution Statement. Multiple email addresses may be selected for each Giving Unit.

▶**Program** ▶**Contributions** ▶**Giving Unit Email Maintenance**

Giving Unit Email Maintenance can be used to quickly identify multiple Giving Unit records to receive Email Statements. Check the **Send** box and then select the email address(s) that should receive an Email Statement.
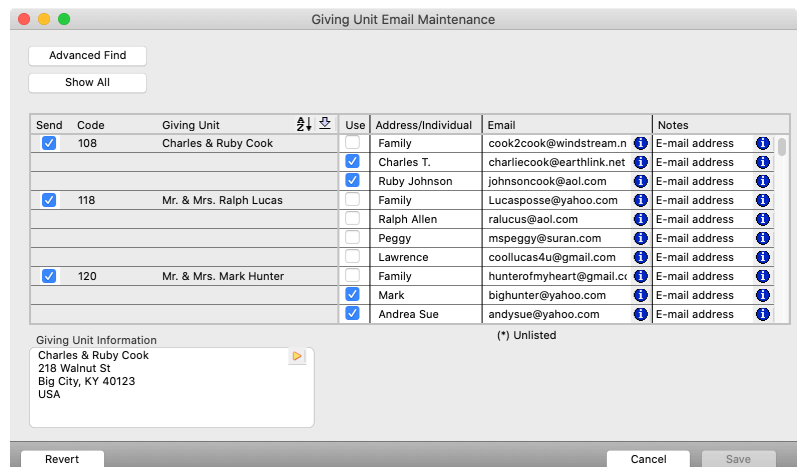
Generating Email Statements

Select either email statement format – default column or Line – from the Reports menu.

▶**Reports** ▶**Contribution Reports** ▶**Statements/Receipts** ▶**Contribution Statements Email** or **Line Email**

Email statements will be created for all Giving Units marked to receive Email Statements. The report setup for email statements is the same as for the printed statements with the addition of two tabs: **Notice** tab and the **Security** tab.
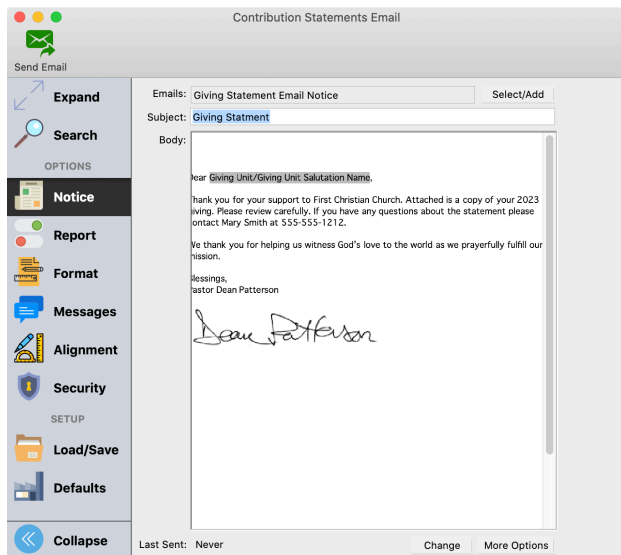
Notice Option

Click the **Select/Add** button, then click the small **Add** button to create a new Contribution Statement notice email. Enter a name when prompted, click **OK**, and the Notice editor window will open for you to create your custom email notice.

To preview the email message, see the list of recipients, and send a test notice, click the **More Options** button on the **Notice** tab.

Please refer to the Notices class or section of the Users Conference manual for more information on creating/formatting the email notice.
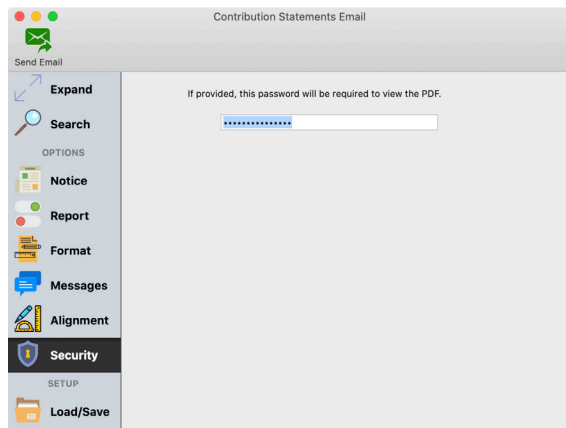
Security Option

Set the **User Password** to require the recipient to enter this password in order to view a PDF of the contributions statement (optional). If a User Password is utilized, some means of sharing this password with the recipients must be made; a separate email from CDM+ containing the User Password is a possibility. The same User Password is used by all members.

Click **Send Email** on the Notice tab to send the Email and the attached Contributions Statement PDF file.
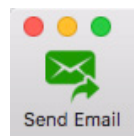
After the Email has been sent, the Giving Unit information record will be updated with the date of the last statement emailed to the giver.

▶**Program** ▶**Contributions** ▶**Giving Unit Records** ▶**Information** tab ▶**Last Statement Email** date
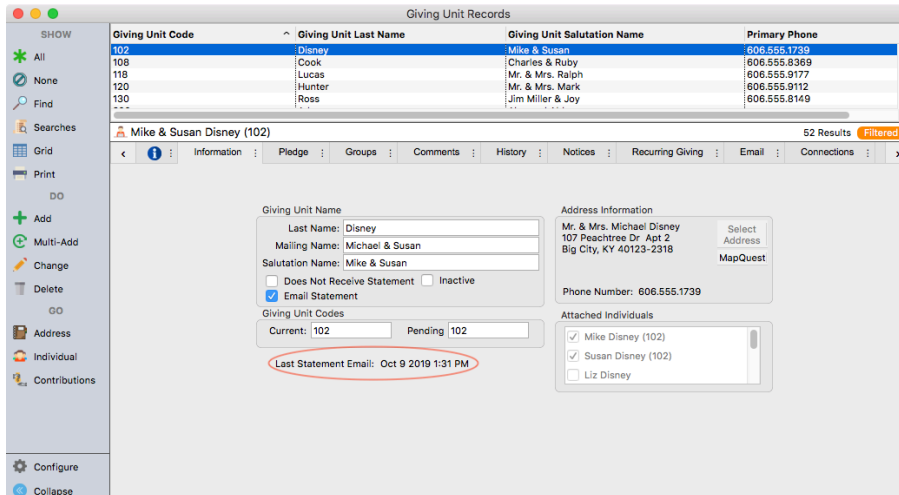
To find the Giving Units to send the optional User Password and email them, use the Giving Unit Email Notice report, create your notice, and use the Advanced Search to select the recipients.

▶**Reports** ▶**Contribution Reports** ▶**Notices** ▶**Giving Unit Emails**
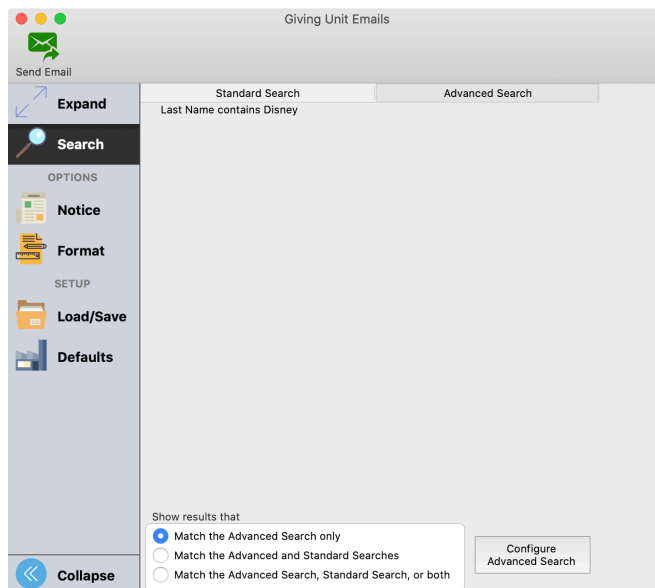
Receipts

▶**Reports** ▶**Contribution Reports** ▶**Statements/Receipts** ▶**Receipts**

Receipts are specialized versions of the contribution statement. In simplistic terms, they are a cross between giving notices and statements.

- Typically based upon event code. For instance, create an event code for China Earthquake Relief, enter contributions in batch contributions entry or contributions maintenance specifying this event code in the batch setup. Select this event code from the receipts Search window.

- Receipts are printed for each gift. If Mike Disney contributes three times to Life Center, he will receive three receipts.
- The Report option lets you choose to print receipts with or without a return stub. Use the stub to invite future gifts. You may also assign receipt numbers on the Report tab.
- Receipts offer the same capabilities of the other Notices with respect to formatting and insertion of personalized information and graphics. See the Notices section of this manual for complete details on how to personalize letter notices.
- After receipts have been printed, CDM+ can mark the records as "Receipt Printed" ensuring you won't include these the next time you print receipts.
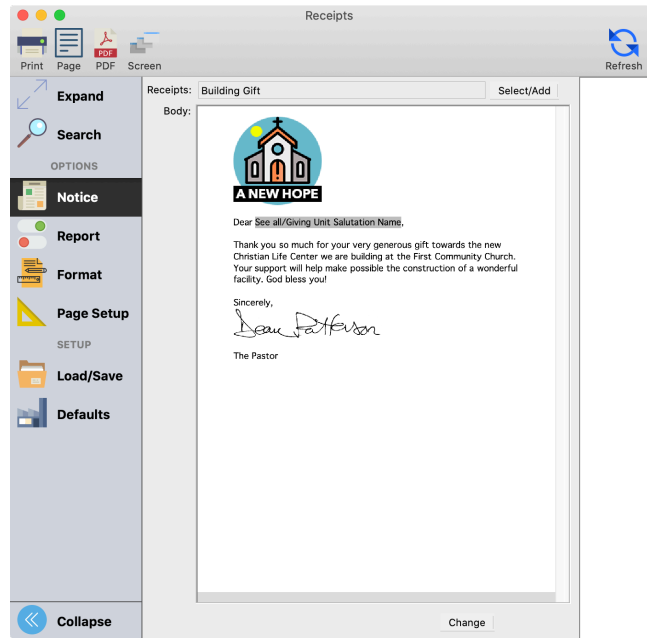
Sample Receipt

Receipt#	Type	Previous Donation	
290	Check		
Date of Gift	**Number**	**Description**	**Amount**
May 1 2022	703	Building Fund	100.00

PLEASE INDICATE CHANGES BELOW

Name		First Church 123 Main Street Big City, KY 40123 606/555-1234	Designation	Amount
Street Address and Apt#				
City State and Zip Code	Area Code and Telephone# ( )	108 Charles & Ruby Cook 218 Walnut St Big City, KY 40123 USA		
Email			Total Amount Enclosed:	$

Please detach and return with next donation

Dear Charles & Ruby,

Thank you so much for your very generous gift towards the new Christian Life Center we are building at the First Community Church. Your support will help make possible the construction of a wonderful facility. God bless you!

Sincerely,

The Pastor

Online Statements

Online statements are a new feature that was rolled out at the end of 2022 and is available on CDM+ 12.1 and above. A few benefits of online statement include:

- Easy to generate and make changes.
- Encourages your donors to login to their Engage account.
- Streamlines the online giving process.
- Most secure way to distribute the donors' statements.

Four Stages of Generating Online Statements

There are four stages to think through when generating your online statements.

1. **Prep** - Before generating online statements, you will want to review the list of your donors within the date range that you are generating a statement for. You will want to verify that all donations have been processed, they have an email on file, their Donor/Giving Unit record has Email Statements checked, and multiple records have been merged together. Please refer to the Getting Started- Contributions and Contribution Procedures sections in this manual for further steps and instructions.
2. **Generate a Batch** - A batch contains statements for the donors within the date range that you select.
3. **Review** - You will want to review the list of statements to make sure there are no alerts or changes that you need to make before publishing and sending your statements.
4. **Send** - Here you can publish your statements so your donors can view their statements in their Engage account and then send an email letting them know their statement is ready to view.

Navigating to Online Statements

In Standard CDM+ you can navigate by going to **Program ▶ CDM+ Engage ▶ Engage Giving Statements.**
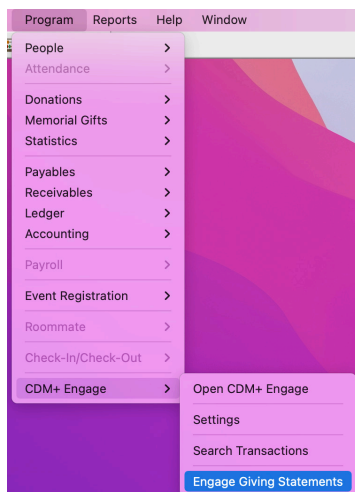
If you are logged into Engage as an Admin, you can generate statements by clicking on Giving Statement Batches under the Admin menu.
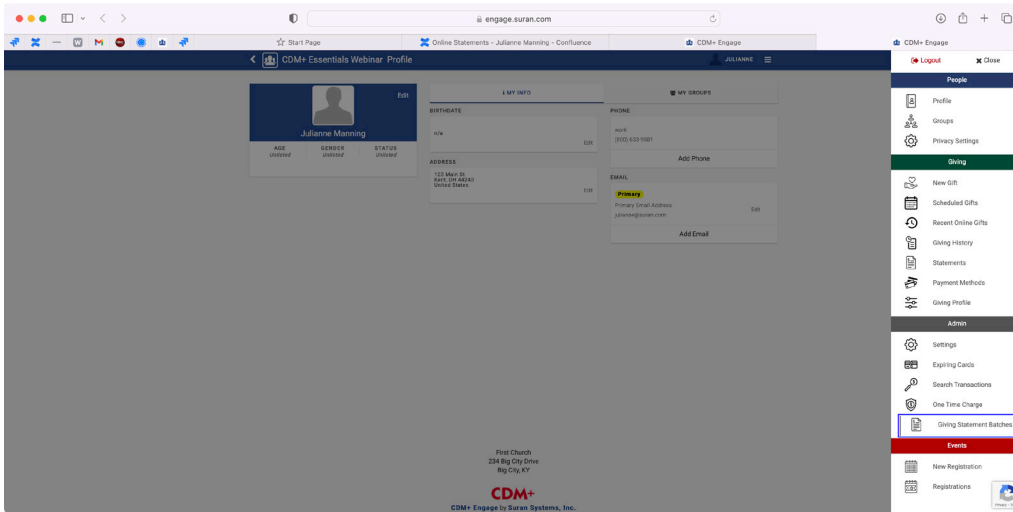
In Essentials, you can navigate to Online Statements from the Welcome to CDM+ window or by going to **Reports ▶ Online Statements**.
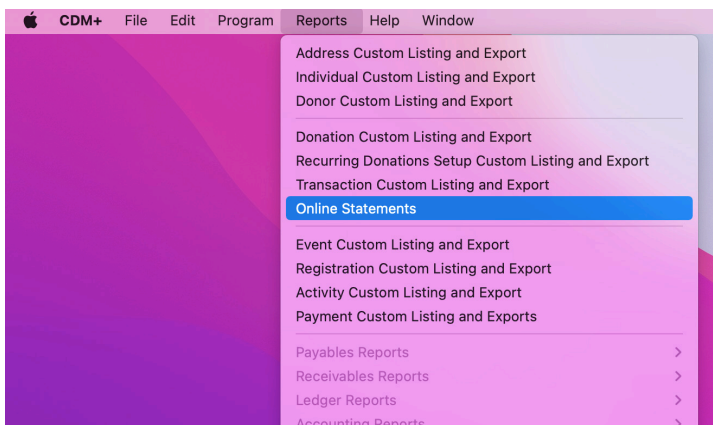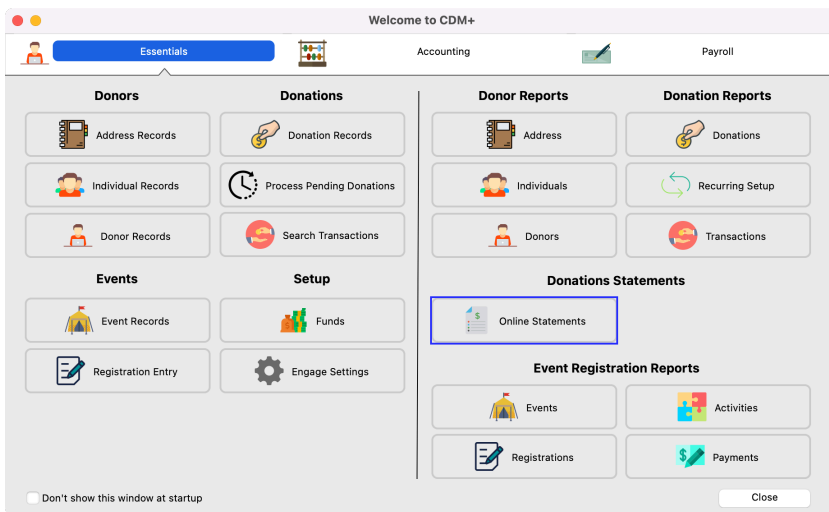
Generate Giving Statement Batch Dashboard

This dashboard allows you to see all previously generated batches that you can view, edit, and delete. You will also create a new batch from this window.
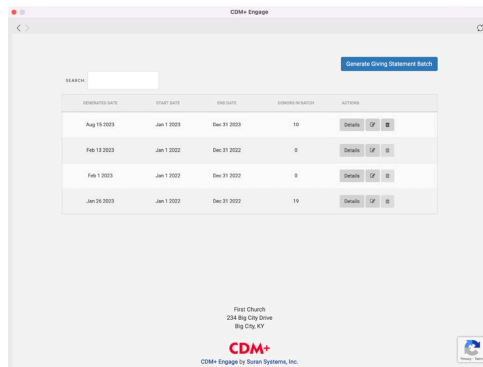
Generating a Batch

You will first enter the Start Date and End Date for the range of donations you want to generate a batch. This date range will be based on the Donation/Contribution date.
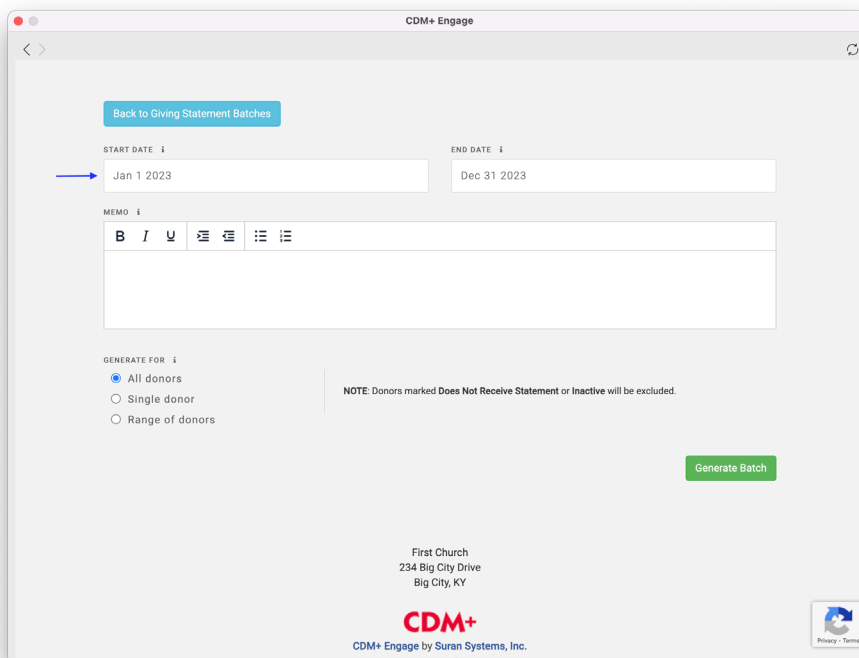
You can then enter in text into the Memo field. This is a great place to say thank you to your donors and include any tax deductible text such as, "No goods or services were received in exchange for this contribution."
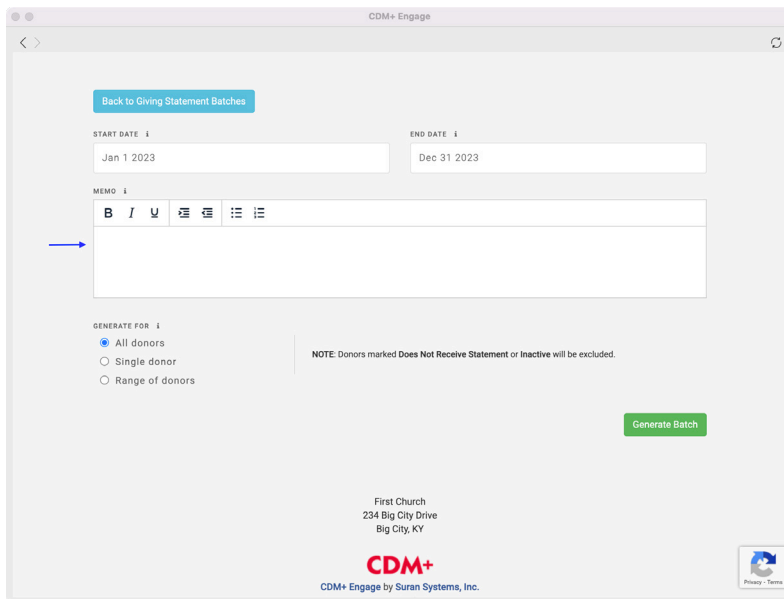
To Generate a statement for All Donors use the "All Donors" radio button.
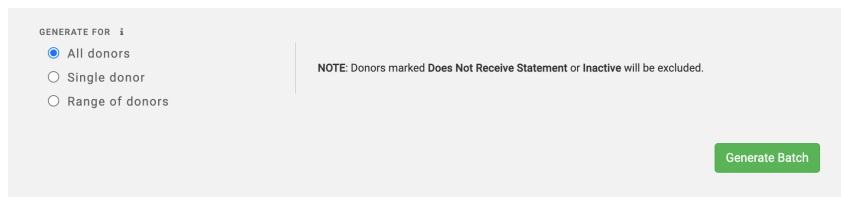
If you want to generate a batch for a single donor, use the "Single donor" radio button and then either type in the donor's code or use the drop-down box to select the donor that you need.
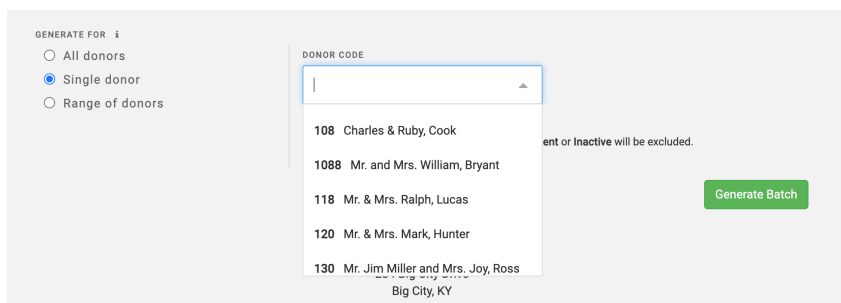
If you want to select just a range of donors, use the "Range of donors" radio button and either type or use the drop-down boxes to enter in the range that you need.

Click Generate Batch when you have finished making your selections.

Batch Details Page

The Batch Details page is where you can see the list of donors within each batched. From this page you can view or download a statement for a specific donor, publish the statements, and retract statements if need be.

Publishing the Statements

When you publish a statement it means that it is now visible to your donor when they login to their Engage account. You can publish the batch all at once or for each individual donor.

Retracting Statements

If you realize an error was made and you need to fix an error on a statement, you can choose to Retract All Published statements or just the statement for the donor you need to correct. When you retract a statement, the donor will no longer be able to view this statement from their Engage account.
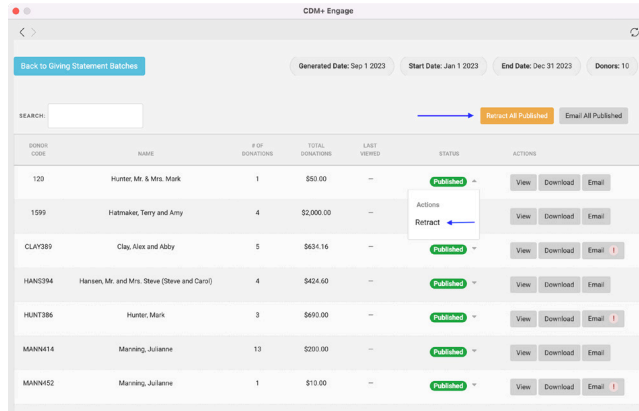
Once you fix any errors that need to be updated, you can then click on the Re-generate All Retracted button or click on Re-generate next to the donor whose statement you corrected.
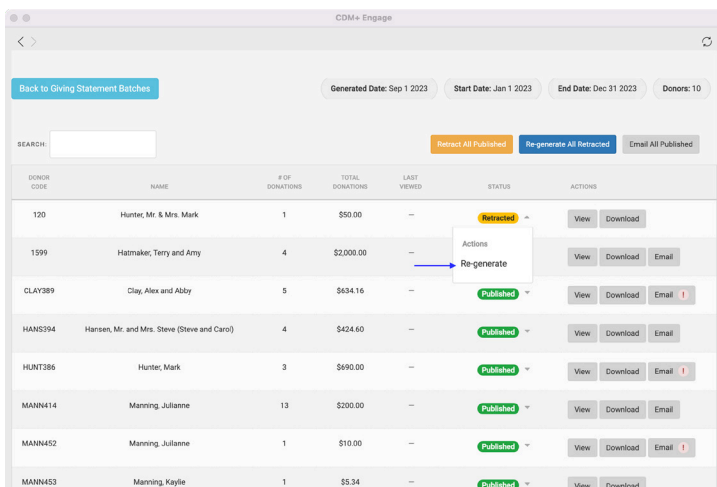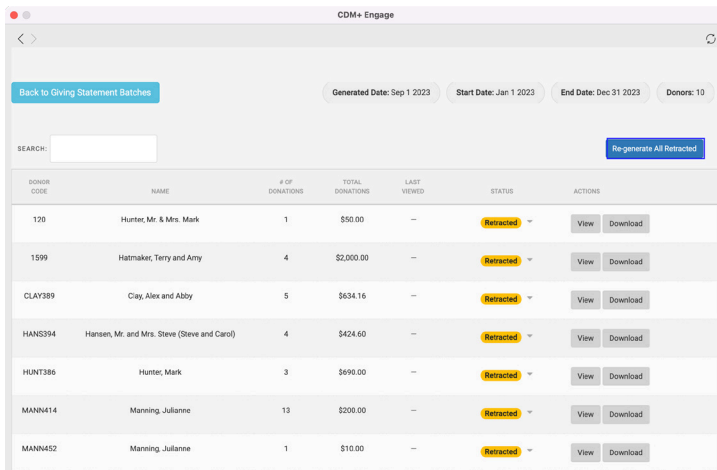
You will then click on Publish All Unpublished to make the statements visible to your donors again.

Email Published Statements

Before emailing your statements, check the Batch Details Page to make sure there are no errors. If you see a red exclamation mark next to a donor's name, that means that the Email Statement box is not checked on their Giving Unit/Donor record. You will want to make sure to check this box on their record before continuing.

You will also want to scan through your list to make sure you see the Email button next to the donor's name. If you do not see the Email button, it means that the donor does not have an email attached to their Giving Unit/Donor record. You will want to go to their Constituent/Individual record to add their email associated with their Engage account. Please refer to the Getting Started-Membership and Engage Administration sections in this manual for further steps and instructions.
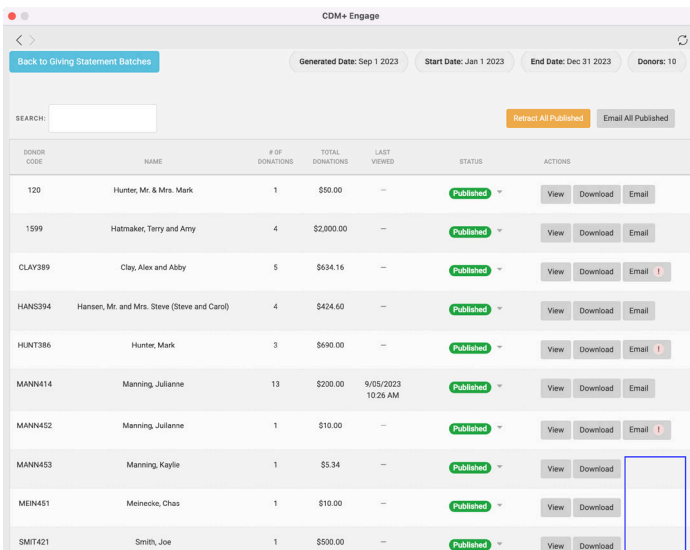
Once all alerts have been updated you can click on the Email All Published button to email your donors.
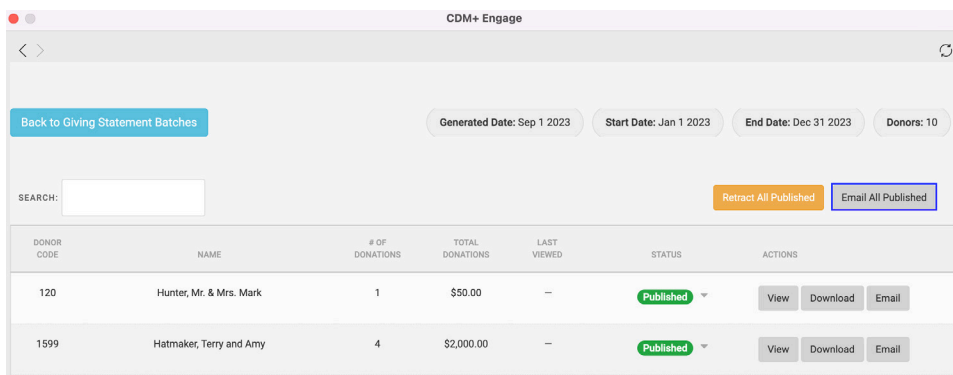
You will get a success pop-up message to let you know the emails have even successfully sent.

Success!

10 giving statement emails sent

OK
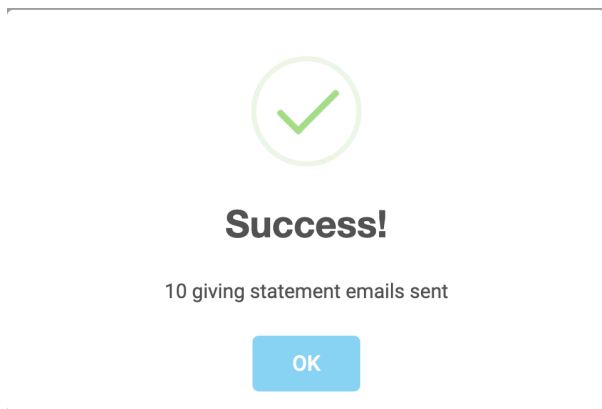
When you email all published statements, you are sending a notification email to your donors encouraging them to login to their Engage account to view their statements. An example of this notification is below.
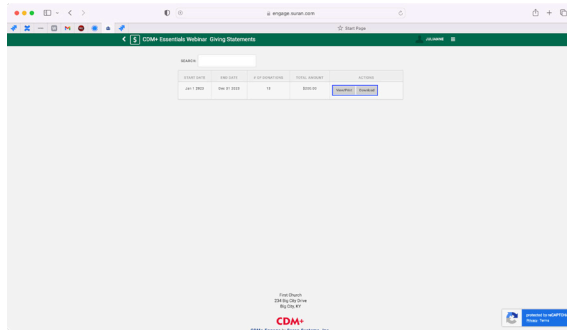

Online Giving Statement

CE **CDM+ Essentials Webinar <noreply@suran.com>**
     To: julianne@suran.com

Today at 3:10 PM

Dear Julianne Manning,

Your giving statement from CDM+ Essentials Webinar for 1/01/2023 to 12/31/2023 is now available to view, print, and download.

Access Statement

First Church 234 Big City Drive Big City, KY

CDM+

Powered by CDM+ Engage from Suran Systems, Inc.

Viewing and Downloading Statements

Under the Batch Details page you are able to click on View or Download to see a specific statement for a donor.

When you click on View, you will see a preview of what your donor will see when they click to view their statement in their Engage Account. From this view, you will also have the options to Print Online Giving Statement, Download Online Giving Statement, and to Email Online Giving Statement. If you choose to "Email Online Giving Statement" your donor receives an email to login to their Engage account to view their statement.

If you click on Download, you'll be able to save the statement to your computer.

How Donors can View their Statements in Engage

When a donor logs into their Engage account, they can view their statements from their Giving menu.

From here, they will have the option to View/Print or Download their statement.
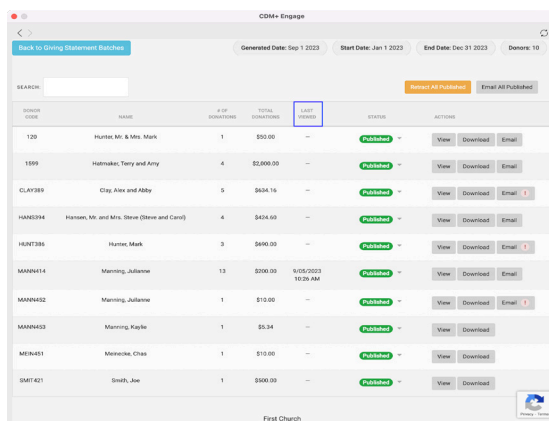

When they view their statement, they will have the option to print or download.
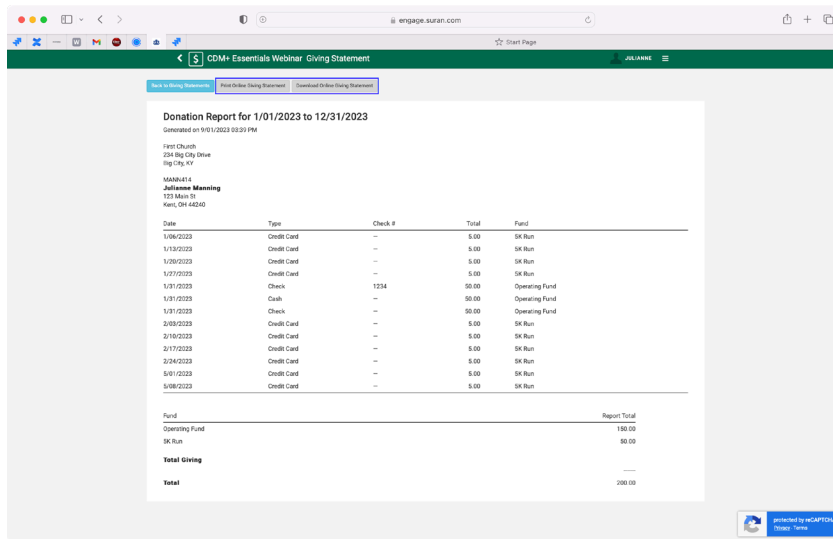
If they choose to download their statement, they'll be able to save their statement to their computer.

How to see if a Donor has viewed their statement.

On the Batch Detail page, you can use the Last Viewed column to see when or if a donor has reviewed their statement.

You can also click on the Last Viewed Column header to easily sort this list to group together those that have and have not viewed their statement. (You can click on any of the column headers to sort by that category.)

Searching for a Statement

On the Batch Details page, there is a dynamic search field that allows you to search by a donor's name, amount of donation, donor code, etc so you can view a statement you are looking for.