

How do I print a Givings Statement

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A Givings Statement (aka Tax Statement) is useful to create if you need to report on someones giving for a certain period of time. For example if you are required to produce a monthly statement of givings or yearly for tax purposes just follow these steps:

1. Log into Database
2. From the Data/Reports Menu select Reports. This will pop up the Reports Menu Page.
3. Select Financial Reports which will popup a select list drop down.
4. Select Giving Report (Tax Statement) from the Financial Reports drop down then click NEXT.
5. This will pop up the "Financial Reports: Giving Report" Screen
6. Select the filters from the filters section
7. You can filter by family (CTRL + Click will allow multiple families to be selected)
8. Set the correct start and end days for the report.
9. Select the Fund or All Funds
10. Set the Minimum amount
11. Change the Report Sentence 2 or 3 if needed to something appropriate for the report. In addition change the Signature Line to the appropriate person.