Online Contribution Statement Process for Year End

It is a common practice for churches to send Contribution Statements quarterly or yearly. Both options include a cost for providing this service. An optimum way for providing contribution statements is through InFellowship's Online Giving. Anyone with an InFellowship ID can sign on to view and print their Online Statement. People who do not have an InFellowship should receive a printed version of the statement by regular mail.

The combination of the online statement feature and the ability to generate contribution statements for a group will allow you to provide contribution statements at the lowest cost possible.

We recommend transitioning to online statements by making paper contribution statements available to donors by request or by requiring that those donors pick up their statements at the church office.

Viewing Contribution Statements in Online Giving

InFellowship Users can view and print an Online Giving Statement that can also be used for submission to the IRS for end of year tax purposes. The statement includes the church's name, address, and optionally, the tax ID number (or EIN).

See Online Statement Print Preview for directions on configuring the appearance of the online statement.

Making the Statement Available Online

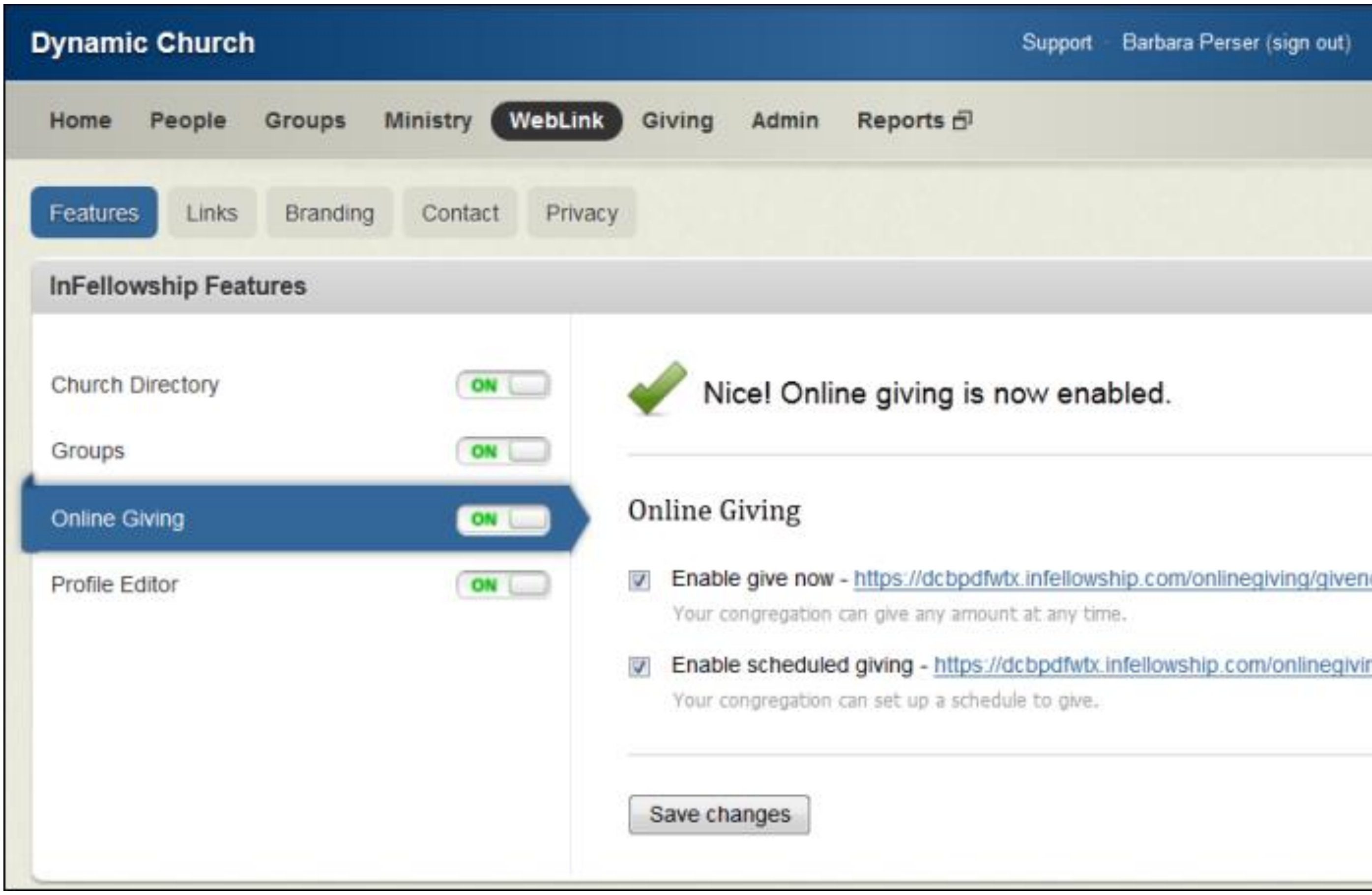
To make the statement available online

1. Navigate to **WebLink** > *InFellowship* > **Features**

2. Ensure that the Online Giving feature is **ON**

3. Optionally, select **Enable Give Now** and/ or **Enable Scheduled Giving**. (Payment gateway is required for both of these options)

4. **Save changes**



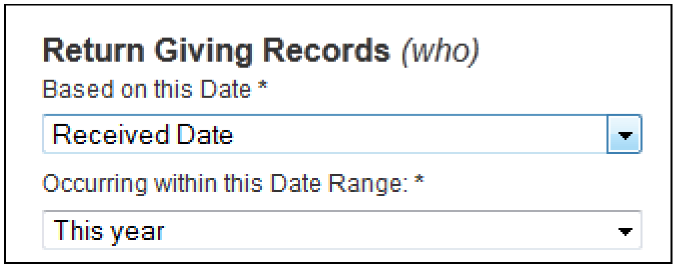
Communicating with InFellowship Users

InFellowship Users may not know that the online statement is an available option, so you should develop a communication plan - possibly an email campaign to let them know how to take advantage of this option.

First, you need to know who made a contribution last year.

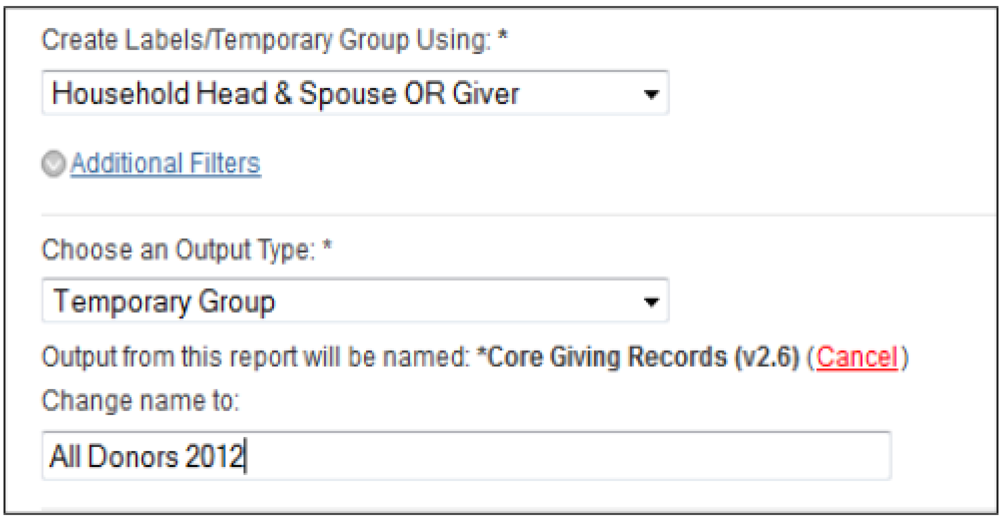
Run G1050E – (*Core Giving Records Report*) to create a temporary group consisting of all people that gave last year to selected funds. We'll call them the Donors.

1. Access the Report Library and search for G1050 Core Giving Records
2. Start with the received date of this year as shown in the diagram



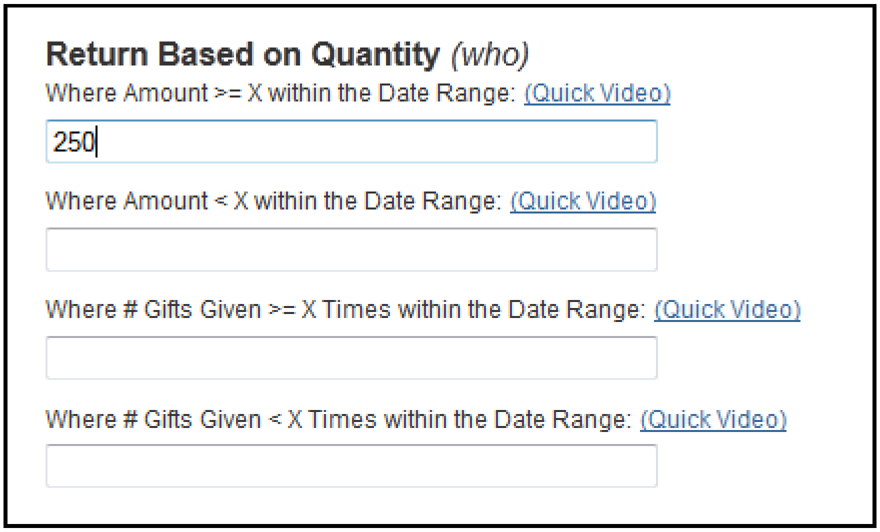
3. Choose who you want in your temporary group output

Tip! Be sure to change the temporary group name to something meaningful or the report will have a generic name and may be difficult to locate in the list of temporary groups.

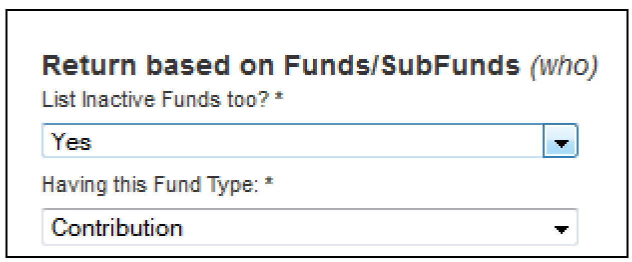


Additional Filters to consider

If you want to limit your donor list to those who made a minimum donation total, enter the dollar amount in the X within the Data Range field.



Limit the list to those who have a contribution type fund



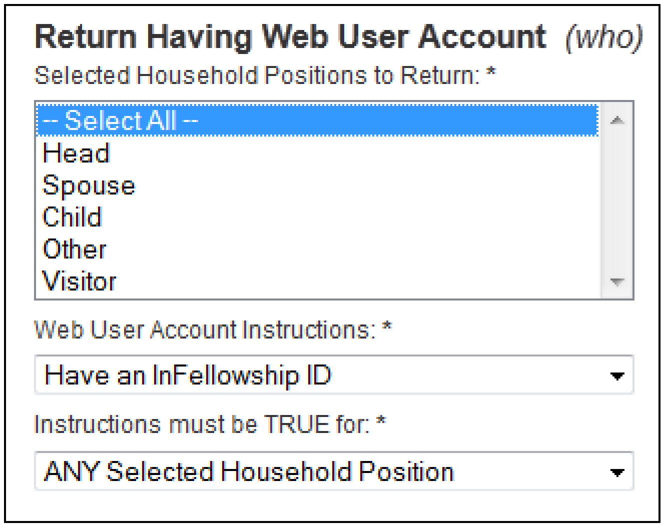
4. Click **Run Report**

Next, use the *Core Web User Account Records* report and temporary groups to determine who has an InFellowship User ID.

1. Access the Report Library and search for A8000 (*Core Web User Account Records*).

2. Select the temporary group from the G1050 report as the "Selected Group Members to Return".

3. Search for anyone who has an InFellowship ID



4. Output to a group for your email as shown below.

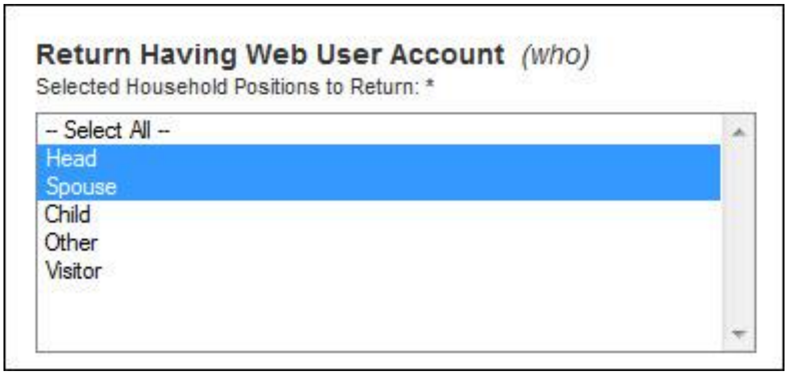
Reminder! Be sure to change the temporary group name to something meaningful or the report will have a generic name and may be difficult to locate in the list of temporary groups.

Use the *Core Web User Account Records* report A8000 and temporary groups to determine who DOES NOT have an InFellowship User ID.

1. Access the Report Library and search for A8000 Core Web User Account Records.

2. Select the temporary group from the G1050 report as the 'Selected Group Members to Return'.

3. Now select Head and Spouse from 'Household Positions to Return'.



4. Output to a temporary group for your email as shown below. Be sure to change the temporary group name to something meaningful or the report will have a generic name and may be difficult to locate in a the list of temporary groups**.**

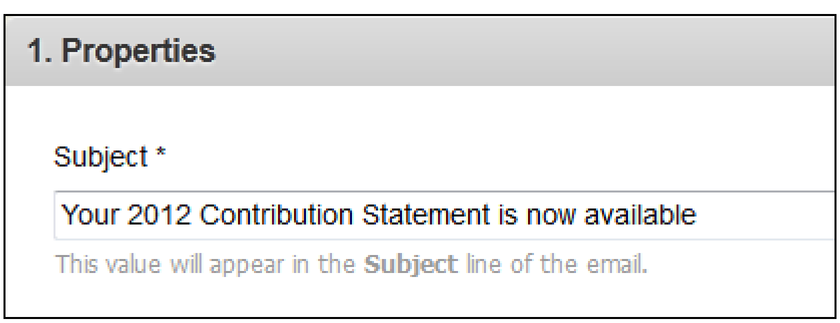
Communicating via Email

Now we have the appropriate groups saved and can use the groups to send an email to individuals who have the ability to sign into InFellowship and retrieve their contribution statements.

To send the email:

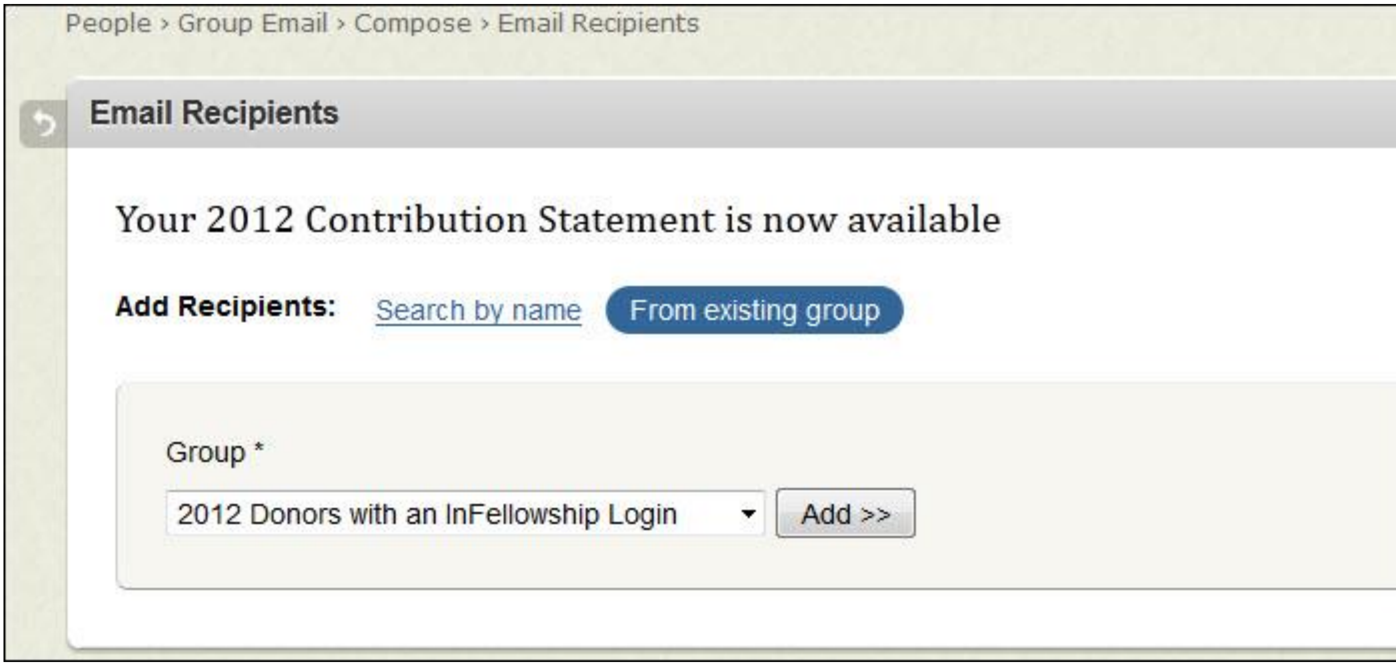
1. Navigate to **People** > *Group Email* > **Compose**

2. Enter a subject for the email as shown in the image below



3. Click **Add Recipients**

4. Choose "From **Existing Group**" and select the temporary group of #5.

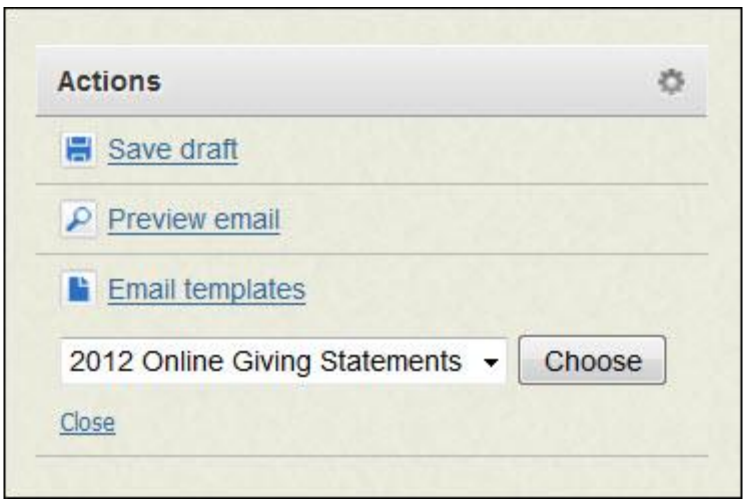


5. Click **Add**

6. Click the **Rollback Arrow** (not your browser's back arrow) to return to Email

7. Use an Email template to compose your email as shown below.

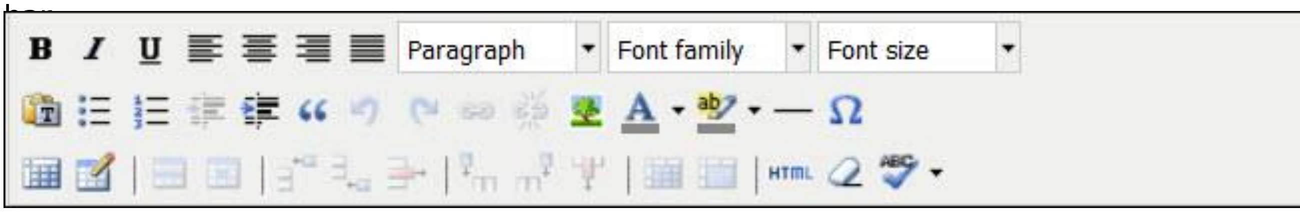
NOTE: Templates can be created in the **People** > *Group Email* > **Templates** menu.



To Use an Existing Email Template

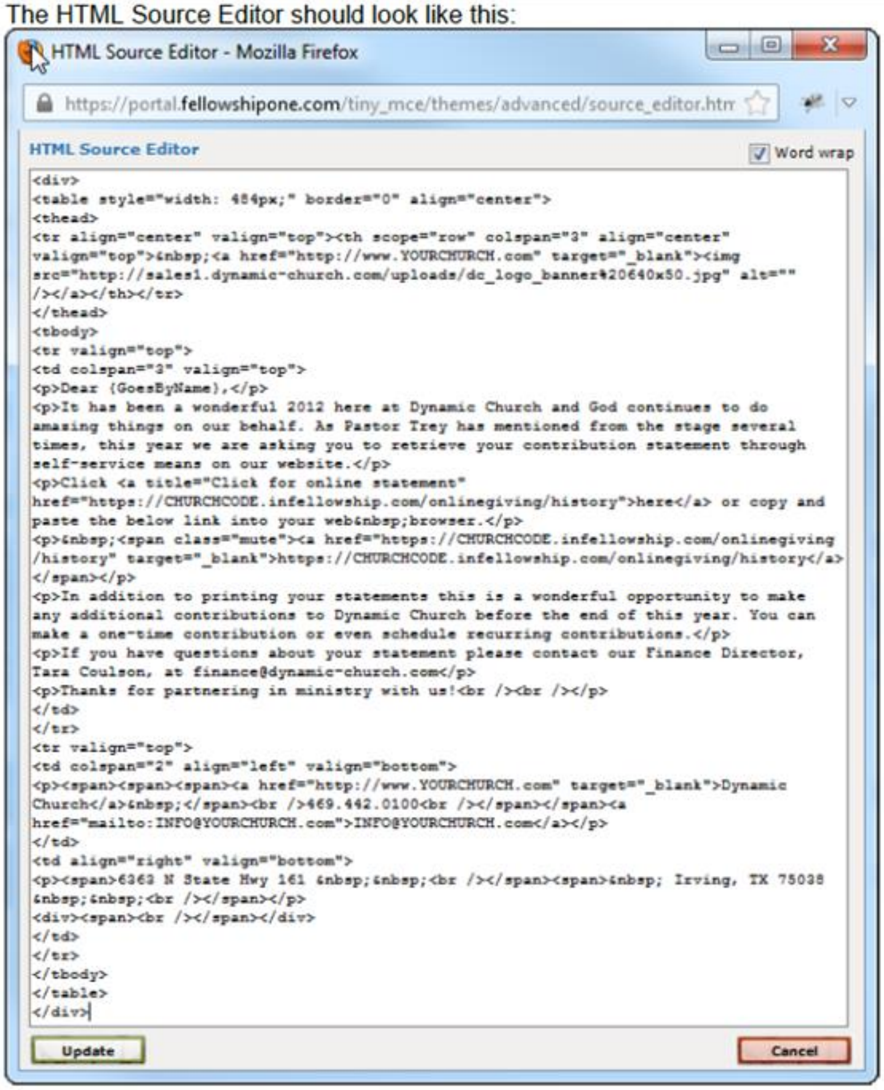
1. Download the Email Template to your computer.
2. Navigate to **People** > *Group Email* > **Templates**.
3. Click **Add** on the right side of the page.
4. Enter a name for your template.

5. Locate the **HTML** icon on the menu bar.

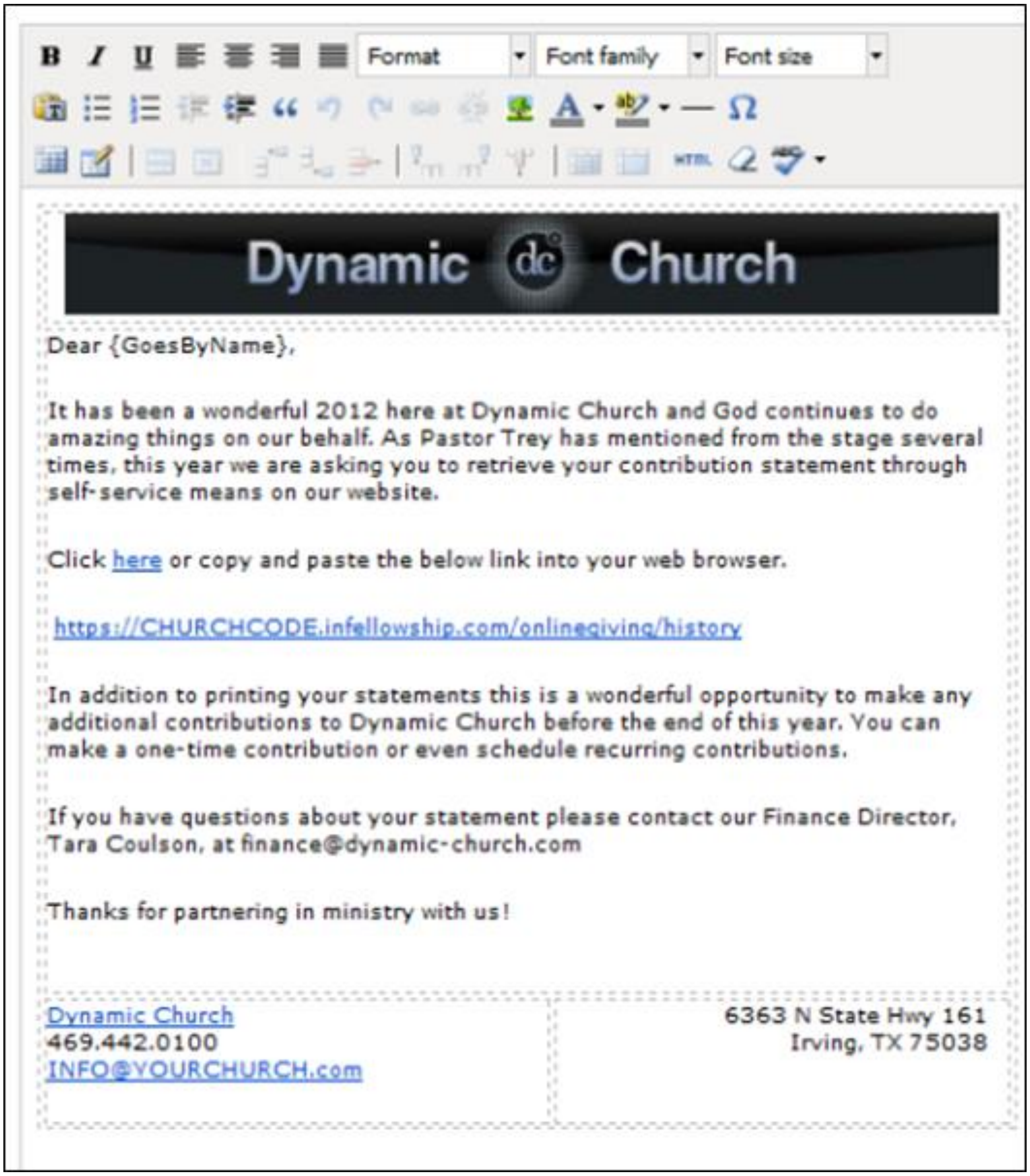


6. Click on the HTML icon to open the HTML source editor.
7. Open the file that you downloaded to your computer in step 1.
8. Copy all of the contents and paste into the HTML source editor as shown in the image below.

The HTML Source Editor should look like this:



9. Click **Update** Now you should see the template editor with the example email as shown below



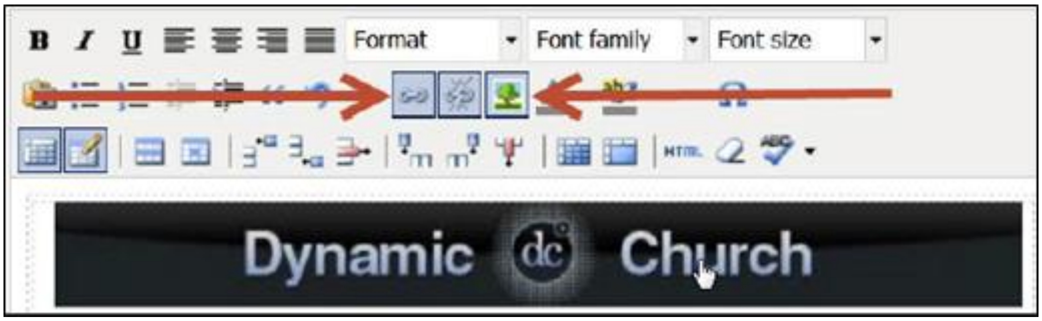
10. Compose your email.

11. Use the following information as a guide:

- Indicate that the email is an effort to reduce costs and provide the notice that a physical copy of the statement will not be mailed.
- Provide a link and location to the church's Online Giving page.
- Explain that the online statement can be used for IRS filing purposes.

To change the header image, make sure that new image is hosted in a public server location (such as Dropbox.com, Google drive, or your church's website server). The image should have a complete web address (example https://www.google.com/images/spr/logo3w.png)

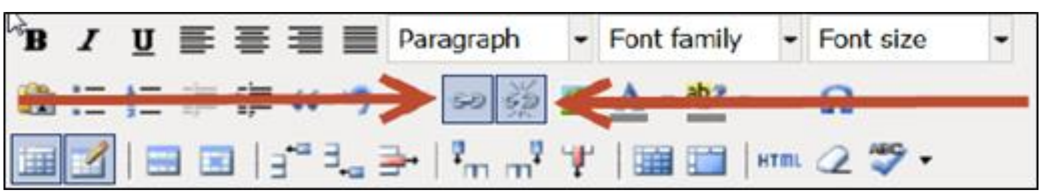
Click on the **image** in the template & you will see the menu buttons highlighted that control what image you see.



Click on the **tree icon** to select and change the image. Click on the **chain link** icon to change the web address where the user will be directed if they click on the image. If you do not want this behavior, simply click the **broken chain image**.

To change the web address in the template email

Highlight the link and look for the chain link menu buttons.



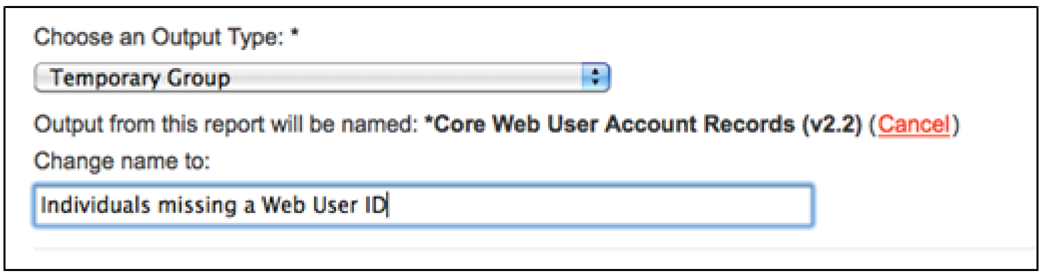
Click the **chain link** button to change the web address to match your InFellowship address. (See **Weblink** > *InFellowship* > **Links** to find the link to your church's online giving history.)

Mailing Contribution Statements

Once you have emailed your Web Users, you can exclude them from receiving a paper contribution statement. This is the process that will reduce costs for your church. Use the Core Web User Account Records report and temporary groups to determine who DOES NOT have a web account of any kind.

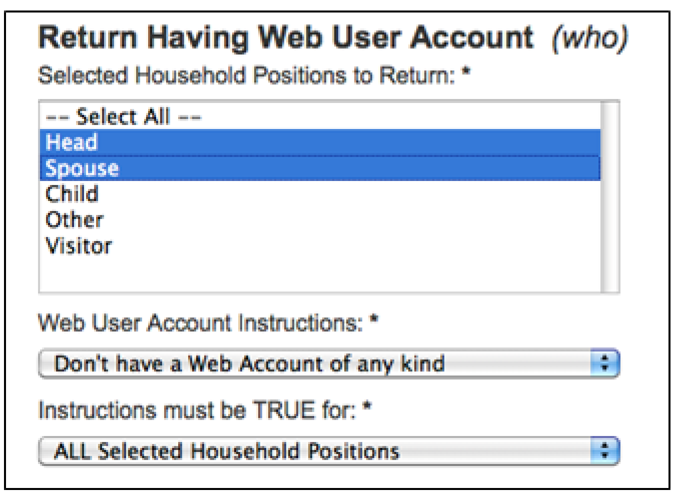
1. Access the Report Library and search for A8000 Core Web User Account Records.

2. Select the temporary group from the *G1050 report (We suggested changing the name of this report to something meaningful, so it should be easier to find.) as the 'Selected Group Members to Return



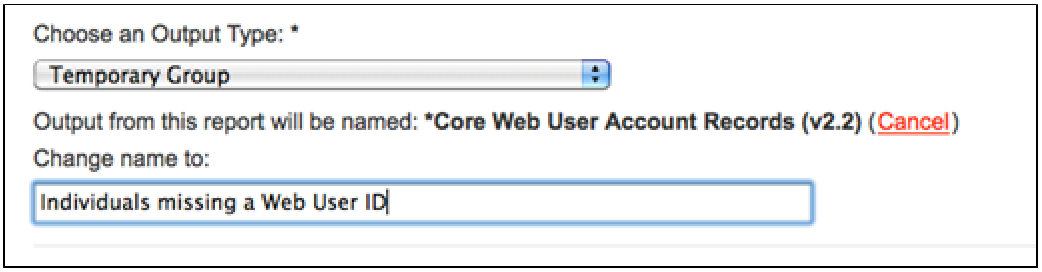
3. Select Don't have a Web Account of Any Kind from the 'Return Having Web User Account' Instructions drop- down list.

4. Select All Selected Household Positions from the 'Instructions must be TRUE"



5. Select Temporary Group from the Output Type drop-down list.

6. Change the name of the Temporary Group. If you do not change it, the name will display as ‘Core Web User Account Records’ and may be difficult to locate for future use.



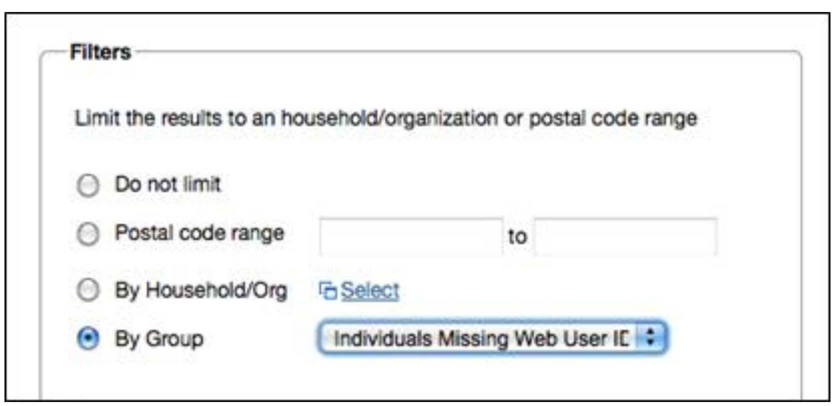
7. Click **Run Report**

Once the report has completed, it can be used in the Contribution Statement Builder.

1. Click Giving.

2. Click Statement Builder.

3. In the Filters box, select the By Group option, and then select the newly created Temporary Group (Individuals Missing Web User ID).



4. Select the additional statement filters you would normally select. See Contribution Statements for step-by-step directions.

The contribution statements will be created as they normally would, but will include only those households/ individuals that do not have an InFellowship or Web User ID.

Now that the statements have been generated, they are ready to be printed, folded and mailed!