CONTRIBUTION STATEMENT STYLES

Practice using the Contribution Statement generator in this hands-on lab. Learn how to use images and styles to customize your contribution statements.

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November 9, 2010

CONTRIBUTION STATEMENT STYLES

OVERVIEW

Statement styles are available for use when running contribution statements from the contribution statement generator. Several styles are available by default in Fellowship One, however, also included is the ability to create your own statement styles.

Where are the Styles?

The statement styles are located within the Contribution Statement generator tools. Click the **Giving › Statements › Statement Builder** menu options on the Giving tab to see the list of default styles.

Notice, in the image above, that you have the ability to upload your own style file along with two image files. Today, we will take an existing style and modify it to create a custom style.

How Do You Decide Which Style Sheet to Use?

Use the Contribution Statements and Request menu option to run a sample statement using each of the available style sheets. Make sure you type some sample text in each of the Comment fields so that you can see where it will land on the completed statement. Your request should look like the following image:

What is XSLT?

XSLT stands for Extensible Style sheet Language Transformation. It is a special language that was developed to convert XML documents into files suitable for a user to display in a browser or in a printable PDF document. The XSL style file is responsible for controlling how the raw data appears to the congregant on his statement.

What is XML?

XML stands for Extensible Markup Language. Its primary purpose is to take raw data from a database and facilitate sharing that data across different information systems, particularly through the Internet. It's a method that is used to separate content from the way that content appears when presented to people.

Putting XSLT and XML Together

If we combine raw XML and an XSLT style sheet together, we get a properly formatted contribution statement. This is a similar concept to creating mail merge letters in Microsoft Word. An Excel file containing data such as names and addresses is merged into a Word document that contains placeholders for the text.

XML and XSLT take this concept a bit further by allowing more control over the final output of your document.

Working with XML and XSLT

The nice thing about working with XML and XSL is that it is all text-based. You can work with the files in any text editing program. It's best to use a program like Notepad, which will not complain about misspelled words or grammar.

Additionally, professional tools are available and make your job a bit easier by providing helper functionality like syntax checking and line numbers. Two such programs are Altova XMLSpy and UltraEdit. Today we will be using Notepad to work with our files.

Opening the Style Sheet File

When you have determined the style that most closely matches the look you are trying to achieve, you will need to open it in your XML editor or text editor.

To open the style sheet file

1. Click **Giving › Statements › Custom Styles** in the menu options on the Giving tab. The Statement Styles form appears.

2. Click **the Actions gear** beside the statement style you want to modify. Click on **View style document** download dialog box appears.
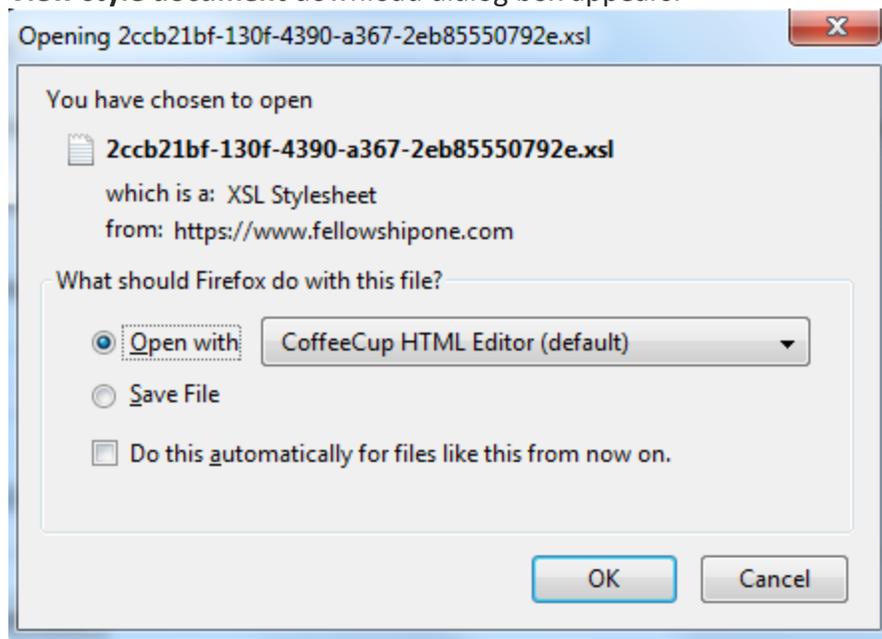
3. Click **Save**. The Save As dialog box appears.
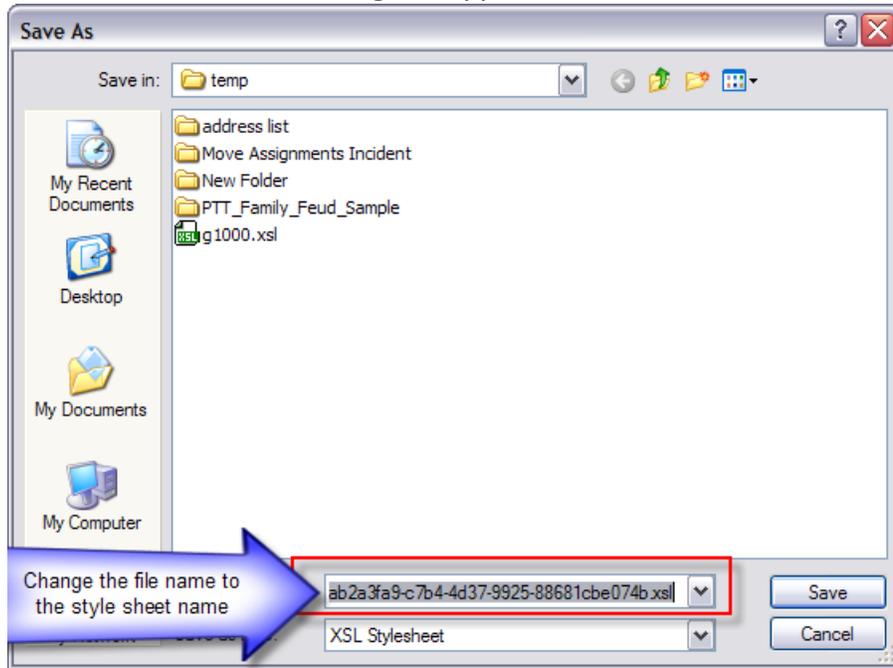
4. Rename the file to the name of the style sheet you are working with and place it in a location where you can easily access it as you work.

5. Open your editing program (or Notepad) and open this file.

Let's practice!

USING A CUSTOM LOGO

What if you want to use a different logo for your statements vs. the default logo? This is an easy fix.

Note: Any .jpg image file less than or equal to 500KB can be used with your style sheet.

You have the ability to upload two images with each style sheet. The code that affects the logo is as shown below

```
<fo:block-container position="absolute" width="2.0in" height="1.5in" left="5.25in"
top="0.0in">
   <xsl:comment>Church Logo (remove next line to remove logo from
statements)</xsl:comment>
   <fo:block text-align="right"><fo:external-graphic
src="url(data:application/ibex-image,ChurchLogo)" max-width="1.875in" max-
height="0.8125in" scaling-method="auto" /></fo:block>
   </fo:block-container>
</fo:static-content>
```

The important code is

```
url(data:application/ibex-image,ChurchLogo)
```

To use a custom logo

1. Open the style sheet in Notepad.

2. Look for the block of text referenced above.

3. Replace **ChurchLogo** with **Image1**. The code should now appear as:
   ```
   url(data:application/ibex-image,Image1)
   ```

4. Save the file – make sure it has the XSL extension on the end. For example, MyFile.xsl.

5. Open Fellowship One and click the **Giving › Statements › Custom Styles** menu options on the Giving tab. The Statement Styles form opens.

6. Type "New Logo" in the **Style Name** field.

7. Click **Browse** in the **XSL Style File** field. When the Open dialog box appears, locate your style file and select it. Click **Open**.

8. Click **Browse** in the **Image 1** field. When the Open dialog box appears, locate the **Contribution Style Sheets** folder on your desktop. Open it and select the **FT-Corp-Two-Color-Hori.jpg** file. Click **Open**.

9. Click **Add Statement Style**.

Custom Styles

Statement Style

Enter a name for the statement style.

Style name * New Logo

Browse to the XSL style document you want to upload and store in Fellowship One to format contribution statements.

XSL style file * C:\Users\jjackson\Dow [Browse…]

Browse to the jpeg images you want to upload to be included in your statement styles.

Image 1 C:\Users\jjackson\Dow [Browse…]

Image 2 _____ [Browse…]

Active ☑

[Add statement style]

10. Click the **Giving › Statements › Statement Builder** menu options. The Contribution Statement Request form appears.

11. Complete the form fields as necessary. This time, select **New Logo** from the **Statement Style** drop-down list.

Format statements using

Output format PDF ▼

Statement style G1000 ▼
  G1000
Sort statements by G1000 Custom Logo
  G1000 No Logo
  G1000 with Sub Fund
Additional files G1002 – Letter Style
  G1005
☐ Include postal co New Logo
☐ Include contribut Summaries Only

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REMOVING NON-CASH STATED VALUES

Some of the default styles will display the non-cash stated values. In the image below, the **Record of Non-Cash Gifts** section displays "100 Shares of ORCL" with the "Stated Value" of $1,710.00. We can use the style sheet to remove the "Stated Valued" column.

Enlargement of the Non-Cash Gifts Area

RECORD OF NON-CASH GIFTS			
Date	Fund	Description	Stated Value
Dec 31	Fund 104	100 shares of ORCL	$1,710.00

The code that affects the Record of Non-Cash Gifts is located in the NonCashRecords block as shown in the image below.

```xml
<xsl:template match="NonCashRecords">
    <fo:table space-before="0.15in">
        <fo:table-column width="1.0in"/>
        <fo:table-column width="2.0in"/>
        <fo:table-column width="3.25in"/>
        <fo:table-column width="1.0in"/>
        <fo:table-body>
            <fo:table-header table-omit-header-at-break="false">
                <fo:table-row>
                    <fo:table-cell background-color="#dadada" border="#000000 solid 1px" padding="2px"  number-columns-spanned="4">
                        <fo:block font="9pt arial" text-align="center">RECORD OF NON-CASH GIFTS</fo:block>
                    </fo:table-cell>
                </fo:table-row>
                <fo:table-row>
                    <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                        <fo:block font="9pt arial">Date</fo:block>
                    </fo:table-cell>
                    <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                        <fo:block font="9pt arial">Fund</fo:block>
                    </fo:table-cell>
                    <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                        <fo:block font="9pt arial">Description</fo:block>
                    </fo:table-cell>
                    <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" border-right="#000000 solid 1px" padding="2px">
                        <fo:block font="9pt arial" text-align="right">Stated Value</fo:block>
                    </fo:table-cell>
                </fo:table-row>
            </fo:table-header>
            <xsl:apply-templates select="NonCashGift"/>
        </fo:table-body>
    </fo:table>
</xsl:template>
```

The specific code we want to focus on is this Stated Value block.

```xml
<fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" border-right="#000000 solid 1px" padding="2px">
    <fo:block font="9pt arial" text-align="right">Stated Value</fo:block>
</fo:table-cell>
```

To remove the Stated Value column

1. Open your style sheet in Notepad.

2. Search for the **NonCashGift** block.

3. Remove the three lines referenced above beginning with **<fo:table-cell** and ending with **</fo:table-cell>**.

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4. Remove the three lines that call the StatedValue column as well. See image below.

```
<xsl:template match="NonCashGift">
    <xsl:for-each select=".">
        <fo:table-row keep-with-next="2">
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="ReceivedDate"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="Fund"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="ContributionMemo"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px" wrap-option="inherit">
                <fo:block font="9pt arial" text-align="right" >$<xsl:value-of select="StatedValue"/></fo:block>
            </fo:table-cell>
        </fo:table-row>
    </xsl:for-each>
</xsl:template>
```

5. Now, we need to remove the column from the layout. Remove the last column.

```
<xsl:template match="NonCashRecords">
    <fo:table space-before="0.15in">
        <fo:table-column width="1.0in"/>
        <fo:table-column width="2.0in"/>
        <fo:table-column width="3.25in"/>
        <fo:table-column width="1.0in"/>
        <fo:table-body>
            <fo:table-header table-omit-header-at-br
                <fo:table-row>
                    <fo:table-cell background-color="#dadada" border="#000000 solid 1px" padding="2px"  number-columns-spanned="4">
                        <fo:block font="9pt arial" text-align="center">RECORD OF NON-CASH GIFTS</fo:block>
                    </fo:table-cell>
                </fo:table-row>
                <fo:table-row>
```

Remove this line and redisburse that 1.0 inch into the other three columns

6. Tweak the other three column widths by distributing the 1.0 inch among them. For example, make the width of the first column 1.3, the second column 2.3, and the last column 3.65.

7. Save the file – make sure it has the XSL extension on the end. For example, MyFile.xsl.

8. Open Fellowship One and click the **Giving › Statements › Custom Styles** menu options on the Giving tab. The Statement Styles form opens.

9. Type **No Stated Values** in the **Style Name** field.

10. Click **Browse** in the **XSL Style File** field. When the Open dialog box appears, locate your style file and select it. Click **Open**.

11. Click **Add Statement Style**.

12. Click the **Contribution Statements** and **Request** menu options. The Contribution Statement Request form appears.

13. Complete the form fields as necessary. This time, select **No Stated Values** from the Statement Style drop-down list.

USING YOUR OWN LETTERHEAD

What if your church has its own custom letterhead that you would rather use in lieu of the default letterhead created by the statement generator? You can modify the style sheet to remove the entire top section of the contribution statement.

Default Look

Statement Modified

After the statement style sheet has been modified, you will be able to print on your own letterhead. The code that affects the header area of the statement is located in the header block as shown below.

```
<fo:page-sequence master-reference="page">
    <fo:static-content flow-name="header">
        <xsl:comment>Church Address (remove the following 4 lines to include no church address)</xsl:comment>
        <fo:block font="11pt arial" start-indent="0.125in"><xsl:value-of select="@ChurchName"/></fo:block>
        <fo:block font="11pt arial" start-indent="0.125in"><xsl:value-of select="@ChurchAddress1"/></fo:block>
        <fo:block font="11pt arial" start-indent="0.125in"><xsl:value-of select="@ChurchAddress2"/></fo:block>
        <fo:block font="11pt arial" start-indent="0.125in"><xsl:value-of select="@ChurchCity"/>, <xsl:value-of select="@ChurchStateProvince"/> <xsl:value-o

        <fo:block-container position="absolute" width="1.75in" height="1.5in" left="3.25in" top="0.0in">
            <fo:block font="bold 14pt arial" space-after="0.1in">Your Statement</fo:block>
            <fo:block font="12pt arial"><xsl:value-of select="@Year"/> <xsl:value-of select="@StartMonth"/>-<xsl:value-of select="@EndMonth"/></fo:block>
        </fo:block-container>

        <fo:block-container position="absolute" width="3.5in" height="0.5in" left="3.25in" top="0.9in">
            <xsl:comment>Comment #1 (header)</xsl:comment>
            <fo:block font="italic 10pt times" linefeed-treatment="preserve"><xsl:value-of select="@Comment1"/></fo:block>
        </fo:block-container>

        <fo:block-container position="absolute" width="2.0in" height="1.5in" left="5.25in" top="0.0in">
            <xsl:comment>Church Logo (remove next line to remove logo from statements)</xsl:comment>
            <fo:block text-align="right"><fo:external-graphic src="url(data:application/ibex-image,ChurchLogo)" max-width="1.875in" max-height="0.8125in" scaling-r
        </fo:block-container>
    </fo:static-content>
```

To remove the header area

1. Open the style sheet in Notepad.

2. Search for the **header** block.

3. Remove all content shaded in the image above.

4. Save the file – make sure it has the XSL extension on the end. For example, MyFile.xsl.

5. Open Fellowship One and click the **Giving › Statements › Custom Styles** menu options on the Giving tab. The Statement Styles form opens.

6. Type **Blank Header** in the **Style Name** field.

7. Click **Browse** in the **XSL Style File** field. When the Open dialog box appears, locate your style file and select it. Click **Open**.

8. Click **Add Statement Style**.

9. Click the **Giving › Statements › Statement Builder** menu options. The Contribution Statement Request form appears.

10. Complete the form fields as necessary. This time, select **Blank Header** from the **Statement Style** drop-down list.

Format statements using

Output format	PDF ▼
Statement style	Blank Header ▼

Blank Header
G1000
G1000 Custom Logo
G1000 No Logo
G1000 with Sub Fund
G1002 – Letter Style
G1005
New Logo
Summaries Only

Sort statements by

Additional files

☐ Include postal co

☐ Include contribut

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MODIFYING LAYOUT

What if you only want to send a summary of contributions to your contributors? The default is to show a record of all contributions for the date range selected. We can remove the Record of Contributions and then move the Contribution Summary, Pledge Summary and Comment 3 up.

Before

Dynamic Church at Brian Vinson
1600 Fry
Denton, TX 76210

Your Statement

2006 Jan-Dec

Comment 1

Brian and Kristie Vinson
7412 Riverchase Trail
Denton, TX 76210

Comment 2

RECORD OF CONTRIBUTIONS

Date	Fund	Contribution Type	Reference	Gift Amount
Jan 25	Pledge Drive Fund 001	Cash		$1,000.00
Apr 01	Fund 102	Cash		$600.00
May 01	Fund 101	Cash		$1,200.00
May 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Jun 01	Pledge Drive Fund 001	Cash		$1,000.00
Jun 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Jul 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Aug 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Sep 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Oct 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$400.00
Oct 22	Fund 101	Cash		$750.00
Nov 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$500.00
Dec 01	Fund 101	Credit Card	XXXX-XXXX-XXXX-0038	$500.00
			Grand Total:	$7,950.00

RECORD OF NON-CASH GIFTS

Date	Fund	Description	Stated Value
Dec 31	Fund 104	100 shares of ORCL	$1,710.00

CONTRIBUTION SUMMARY

Fund	This Period	YTD
Fund 101	$5,350.00	$5,350.00
Fund 102	$600.00	$600.00
Pledge Drive Fund 001	$2,000.00	$2,000.00
Grand Total:	$7,950.00	$7,950.00

PLEDGE SUMMARY

Pledge Drive	Total Pledged	Total Given
Beyond All Limits	$5,000.00	$0.00
Pledge Drive 001	$2,030.00	$4,403.00

Comment 3

Brian and Kristie Vinson

1.1

After

To modify page layout

1. Open the style sheet in Notepad.

2. Search for the ContributionRecords block.

```xml
<fo:table>
    <fo:table-column width="1.0in"/>
    <fo:table-column width="2.0in"/>
    <fo:table-column width="2.0in"/>
    <fo:table-column width="1.25in"/>
    <fo:table-column width="1.0in"/>
    <fo:table-body>
        <fo:table-header table-omit-header-at-break="false">
            <fo:table-row>
                <fo:table-cell background-color="#dadada" border="#000000 solid 1px" padding="2px"  number-columns-spanned="5">
                    <fo:block font="9pt arial" text-align="center">RECORD OF CONTRIBUTIONS</fo:block>
                </fo:table-cell>
            </fo:table-row>
            <fo:table-row>
                <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                    <fo:block font="9pt arial">Date</fo:block>
                </fo:table-cell>
                <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                    <fo:block font="9pt arial">Fund</fo:block>
                </fo:table-cell>
                <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                    <fo:block font="9pt arial">Contribution Type</fo:block>
                </fo:table-cell>
                <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" padding="2px">
                    <fo:block font="9pt arial" text-align="right">Reference</fo:block>
                </fo:table-cell>
                <fo:table-cell border-left="#000000 solid 1px" border-bottom="#000000 solid 1px" border-right="#000000 solid 1px" padding="2px">
```

3. Remove the Record of Contributions table by deleting the code as shown above.

```xml
                    <fo:block font="9pt arial" text-align="right">Gift Amount</fo:block>
                </fo:table-cell>
            </fo:table-row>
        </fo:table-header>
        <xsl:apply-templates select="Contribution"/>
        <fo:table-row >
            <fo:table-cell border-top="#000000 solid 1px">
                <fo:block></fo:block>
            </fo:table-cell>
            <fo:table-cell border-top="#000000 solid 1px">
                <fo:block></fo:block>
            </fo:table-cell>
            <fo:table-cell border-top="#000000 solid 1px">
                <fo:block></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px" border-top="#000000 solid 1px">
                <fo:block font="9pt arial">Grand Total:</fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px" border-top="#000000 solid 1px">
                <fo:block font="9pt arial" text-align="right">$<xsl:value-of select="ContributionRecordsTotal"/></fo:block>
            </fo:table-cell>
        </fo:table-row>
    </fo:table-body>
</fo:table>
```

4. Next, let's delete all the values to clean up our work. Delete the code in the following image.

```
<xsl:template match="Contribution">
    <xsl:for-each select=".">
        <fo:table-row>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="ReceivedDate"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="Fund"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial"><xsl:value-of select="ContributionType"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px">
                <fo:block font="9pt arial" text-align="right"><xsl:value-of select="Reference"/></fo:block>
            </fo:table-cell>
            <fo:table-cell padding="2px" wrap-option="inherit">
                <fo:block font="9pt arial" text-align="right" >$<xsl:value-of select="Amount"/></fo:block>
            </fo:table-cell>
        </fo:table-row>
    </xsl:for-each>
</xsl:template>
```

5. Save the file – make sure it has the XSL extension on the end. For example, MyFile.xsl.

6. Open Fellowship One and click the **Giving › Statements › Custom Styles** menu options on the Giving tab. The Statement Styles form opens.

7. Type **Summaries Only** in the **Style Name** field.

8. Click **Browse** in the **XSL Style File** field. When the Open dialog box appears, locate your style file and select it. Click **Open**.

9. Click **Add Statement Style**.

10. Click the **Giving › Statements › Statement Builder** menu options. The Contribution Statement Request form appears.

Complete the form fields as necessary. This time, select **Summaries Only** from the **Statement Style** drop-down list.

What Information Can You Choose to Show or Hide on a Statement?

Since the Contribution Statement Generator uses XML and XSLT to create the PDF we can choose to show or hide any of the information contained in the XML data source. Here is a list of the information available. (Description – Name in the XML – Example)

Statement Information - Document

- Contribution Detail Start Date - DetailStartDate - 1/1/2010
- Contribution Detail End Date - DetailEndDate - 1/1/2010
- Contribution Summary Start Date - SummaryStartDate - 1/1/2010
- Contribution Summary End Date - SummaryEndDate - 1/1/2010
- Contribution Year - Year - 2010
- Contribution Detail Start Month - StartMonth - Jan
- Contribution Detail End Month - EndMonth - Dec
- Contribution Summary Start Month - SummaryStartMonth - Jan
- Contribution Summary End Month - SummaryEndMonth - Dec
- Date the Statement was run - CreatedDate - 1/1/2010
- Church Name - ChurchName - First Baptist Church of Earth
- Church Address 1 - ChurchAddress1 - 201 Main St.
- Church Address 2 - ChurchAddress2 - Suite 1111
- Church City - ChurchCity - Irving
- Church State - ChurchStateProvince - TX
- Church Postal Code - ChurchPostalCode - 75038
- Church Country - ChurchCountry - United States
- Comment 1 - Comment1 - Your church's text from Comment 1
- Comment 2 - Comment2 - Your church's text from Comment 2
- Comment 3 - Comment3 - Your church's text from Comment 3
- Contribution Statement Description - Description - Last Names (Adams - Washington)

Contributor Information - Contributor

- Household/Individual Full Name - Name - Brian and Kristie Vinson / Brian Vinson
- Household/Individual First Name - FirstName - Brian and Kristie / Brian
- Household/Individual Last Name - LastName - Vinson
- Statement or Primary Address 1 - Address1 - 6363 N State Hwy 161
- Statement or Primary Address 2 - Address2 - Suite 200
- Statement or Primary City - City - Irving
- Statement or Primary State - State - TX
- Statement or Primary Postal Code - PostalCode - 75038

Each Contribution Record - Contribution

- Contribution Type - ContributionType - Cash, Check, Credit Card, ACH, eCheck
- Fund - Fund - Missions
- Sub Fund - SubFund - South America
- Contribution Received Date (Month DD) - ReceivedDate - May 07
- Contribution Received Date (MM/DD/YYYY) - FullReceivedDate - 5/7/2010
- Check Number - Reference - 1520
- Contribution Amount (X,XXX.XX) - Amount - 125.00
- Memo on Contribution - ContributionsMemo - 5/2/2010 Payment Reversed
- Total of Contributions (X,XXX.XX) - ContributionRecordsTotal - 7,000.25

Each Non-Cash Gift - NonCashGift

- Contribution Type - ContributionType - Cash, Check, Credit Card, ACH, eCheck
- Fund - Fund - Missions
- Sub Fund - SubFund - South America
- Contribution Received Date (Month DD) - ReceivedDate - May 07
- Contribution Received Date (MM/DD/YYYY) - FullReceivedDate - 5/7/2010
- Non-Cash Gift Amount (X,XXX.XX) - StatedValue - 10,000.00
- Memo on Contribution - ContributionsMemo - 80 Shares of PRW

Summary of Contributions - ContributionSummary

- Fund - Fund - Missions
- Amount given to this fund in the summary date range (X,XXX.XX) - YTD - 3,500.00
- Amount given to this fund in the detail date range (X,XXX.XX) - ThisPeriod - 1,250.00

Summary of Pledge Drives - PledgeDrives

- Pledge Drive Name - PledgeDrive
- Total amount pledged to this pledge drive (X,XXX.XX) - TotalPledged - 1,000.00
- Total amount given toward the pledge (X,XXX.XX) - TotalGiven - 500.00
- Amount pledged to pledge drive minus amount given toward the pledge (X,XXX.XX) - PledgeBalance - 500.00