



Statements



Purpose Statement and Important Notes

These procedures outline the steps you will take to produce two types of statements:

Financial Summary (New in 2023) – This is a condensed version, or “summary” of the Donor Standard Statement. This report comes in two versions: All Records and Selection. The Financial Summary (All donors) and Financial Summary, Selected reports provide a summary of giving by program or by total but do not list the individual donations, making this a good option for mid-year giving updates.

Donor Standard Statement – This is an itemized statement of giving for a donor(s) through a specified time (typically printed at end of year for tax reporting or documentation purposes). This report comes in two versions: All Records and Selection.

It is important to note, when a payment is entered into Ministry Platform, a nightly process is run, which updates the donor's statement. This means the statement is only current through the processing date. For example, donations entered into Ministry Platform today will not appear on the statement until tomorrow.

Previous year's statements are automatically archived on February 15th to freeze the content for historic purposes.

Table of Contents

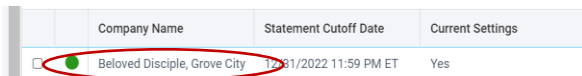
Purpose Statement and Important Notes.....	1
1. Setting Up the Financial Statement in Ministry Platform	2
2. Printing Financial Summary report for all donors together	3
3. Printing a Financial Summary for specific donors	7
3. Printing Donor Standard Statement report for all donors together.....	11
4. Printing Donor Standard Statement for specific donors	13
5. Editing Financial Statement to Correct an Error	15
6. Printing labels to mail statements.....	16

1. Setting Up the Financial Statement in Ministry Platform

1.1. Click **Church Structure** and click **Accounting Companies**.

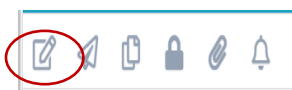


1.2. Click your **Parish Name**. This will drive you to the Statement Settings page.

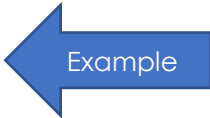
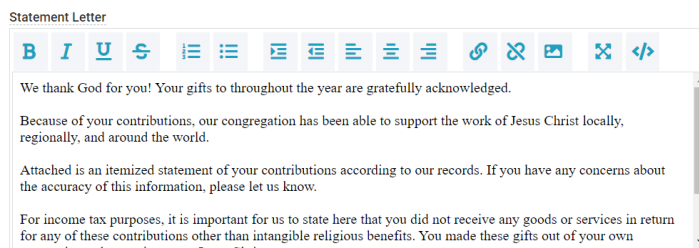


1.3. Set **Formal Salutation *** to **Yes** if you want the letter to use a formal salutation.

1.4. **OPTIONAL STEP:** Click **Edit** button (pencil and paper icon) to change text in the **Statement Letter** (i.e., cover letter) box:



If you are pleased with the language within the **Statement Letter** box, no action is required.



However, you are welcome to use the following suggested text:

Through evangelization, education, charity, service, the proclamation of the Word and the celebration of Sacrament, the mission of our parish is to call forth the gifts of individuals in order to enable each person to advance the reign of God and achieve full human potential and salvation in Christ. Your generous contributions reflect this commitment and your faith in Jesus Christ.

Thank you for your generous gifts!

We thank God for you!

1.5. Click the **Save** button (diskette icon). Your parish statement is now updated. You may precede to the next sections.



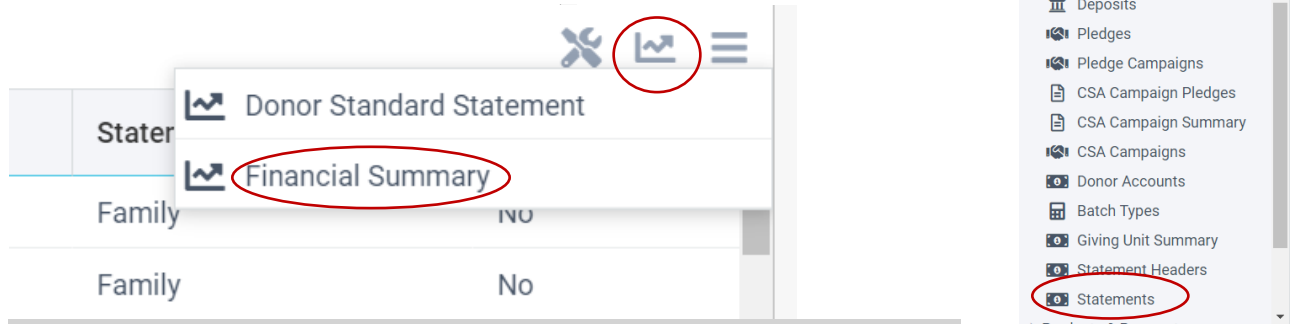
Pro Tip: If you wish to embed your parish logo, please contact Ministry Support for assistance. The Ministry Platform Support number is 800-669-2509.

End of Section

[Return to Table of Contents](#)

2. Printing [Financial Summary](#) report for all donors together

- 2.1. Click **Contributions** and choose **Statements**. This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.
- 2.2. Click the **Reports** button in the upper right corner of the page, then click on **Financial Summary**. This will drive you to the Report Popup Window.



Helpful Information: It is within the Report Popup Window, you can choose the information you wish to see printed on each Financial Summary. You will have the option to choose Start and End Dates, a dollar threshold, produce a Statement Letter (i.e., cover letter) with the Financial Summary, sort order, pages to print, and whether you wish to include the date in which the Financial Summary was printed.

(Proceed to the Next Page)

2.3. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Financial Summary. The table on the following page provides details regarding each field.

Accounting Company	Beloved Disciple, Grove City	Congregation	Beloved Disciple, Grove City	<input type="button" value="View Report"/>
Church Contact Info	Beloved Disciple, Grove City I <input type="checkbox"/> NULL	Memo	For federal income tax purposes, it is: <input type="checkbox"/> NULL	
Start Date	1/1/2022	End Date	12/31/2022	
Gave at Least	250	Sort Order	Postal Code	
Show Letter	<input checked="" type="radio"/> True <input type="radio"/> False	Letter Date	1/20/2023	
Print	All Pages			

(Proceed to the Next Page)

Field Name	Actions and Important Notes
Accounting Company	Select your parish
Congregation	Select your parish
Church Contact Info	<p>This field is optional. The default entry will be your parish; however, you are not required to input any information or you may include your parish name and important contact information. The Project Team recommends you add information in this line as suggested below:</p> <p style="text-align: center;">Church of the Beloved Disciple 1310 S Center Street Ext., Grove City, PA 16127 724-748-6700 www.beloveddisciple parish.org</p>
Memo	<p><u>This is a required field and cannot be Null (blank) and cannot be changed.</u> The memo is where we are housing the required tax disclosure. The tax disclosure is approved by Financial Services and is and should remain, the same language across all parishes. What does this mean for you? Simply make sure the Null Box does not have a checkmark in it.</p>
Start Date	<p>Beginning date for your reports.</p> <p><i>Pro Tip: If you have already entered a date in the field and need to use the same date, click into the field, and select your date below.</i></p>
End Date	<p>Ending date for your reports</p> <p><i>Pro Tip: If you have already entered a date in the field and need to use the same date, click into the field, and select your date below.</i></p>
Gave at Least	<p>If you are only printing statements for people who gave a certain amount or higher, enter that figure in the Gave At Least field; otherwise, use the default value of 0. For example, you may wish to only print statements for those that gave \$250 or more during the year. In this case, you change the default "0" to "250."</p>
Sort Order	Choose from Postal Code (Zip code) or Donor Name order.
Show Letter	<p>If you wish to print the Statement Letter (i.e., cover letter), select True. If not, select False. For assistance in setting up the Statement Letter please refer to Section 1 – Setting Up the Financial Statement in Ministry Platform.</p>
Letter Date	<p>If you wish to include in the Statement Letter (i.e., cover letter) the date in which the report was generated, input the date in this field; otherwise, leave the field blank.</p>
Print	<p>You have the ability to limit the pages you wish to print. The Project Team recommends printing all pages.</p>
(Proceed to the Next Page)	

2.4. Click the **View Report** button.

Accounting Company: Beloved Disciple, Grove City

Congregation: Beloved Disciple, Grove City

Church Contact Info: Church of the Beloved Disciple I 1310 NULL

Memo: For federal income tax purposes, it is NULL

Start Date: 1/1/2022

End Date: 12/31/2022

Gave at Least: 0

Sort Order: Postal Code

Show Letter: True False

Letter Date: 1/20/2023

Print: All Pages

Pro Tip: Use the arrows above to navigate from one report to the next. This is a useful way to ensure you have successfully captured your intended reports.

Save (PDF selected)

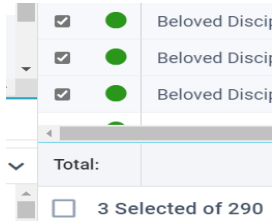
- 2.5. Click the **Save** button (diskette) and select **PDF**. Please note: The PDF may open into Adobe Acrobat, or you may see an “open file” button in the lower left corner (Chrome) or in the upper right corner (Edge.), or the reports may save directly to your downloads folder. How the information is saved by you is dependent on how your computer is set up.
- 2.6. Once the PDF has been created, please print in hard copy form or email according to your established parish process.

End of Section

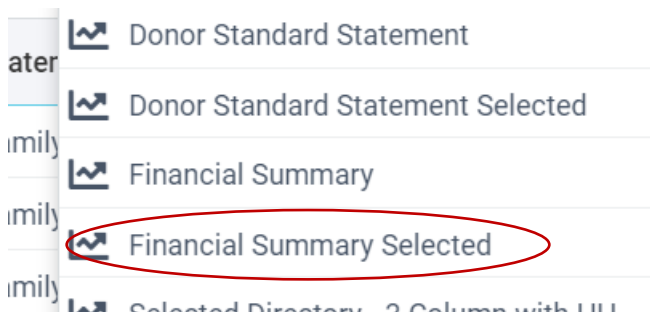
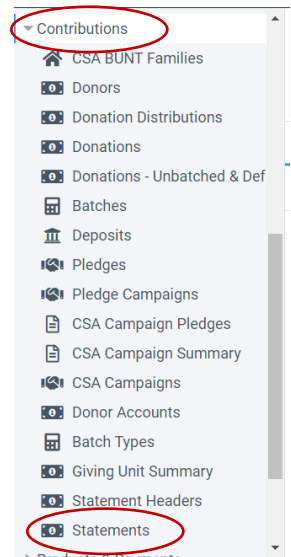
3. Printing a [Financial Summary](#) for specific donors

3.1. Click **Contributions** and choose **Statements**. This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.

3.2. Select the record or records you wish to print.



3.3. Click the **Reports** button in the upper right corner of the page, then click on **Financial Summary Selected**. This will drive you to the Report Popup Window.



Pro Tip: If you are printing just one Financial Summary, it may be a quicker process if you pull up the record in the Donor page, instead of the Contributions page. The Financial Summary Selected feature is available to you in the donor's record. Once you click on Report/Financial Summary Selected the following steps are the same.

Helpful Information: It is within the Report Popup Window, you can choose the information you wish to see printed on each Financial Summary. You will have the option to choose Start and End Dates, a dollar threshold, produce a Statement Letter (i.e., cover letter) with the Financial Summary, sort order, pages to print, and whether you wish to include the date in which the Financial Summary was printed.

(Proceed to the Next Page)

2.1. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Financial Summary. The table on the following page provides details regarding each field.

The screenshot shows a web browser window with the URL <https://my.eriercd.org/mp/ReportViewer/ViewReport.aspx?ReportID=287&PageID=520&GlobalFilterID=17&SelectionID=26315>. The page contains a form for configuring a report. The form fields are as follows:

Accounting Company	Beloved Disciple, Grove City	Congregation	Beloved Disciple, Grove City	View Report
Church Contact Info	Beloved Disciple, Grove City I <input type="checkbox"/> NULL	Memo	For federal income tax purposes, it is: <input type="checkbox"/> NULL	
Start Date	1/1/2022	End Date	12/31/2022	
Gave at Least	250	Sort Order	Postal Code	
Show Letter	<input checked="" type="radio"/> True <input type="radio"/> False	Letter Date	1/20/2023	
Print	All Pages			

(Proceed to the Next Page)

Field Name	Actions and Important Notes
Accounting Company	Select your parish
Congregation	Select your parish
Church Contact Info	<p>This field is optional. The default entry will be your parish; however, you are not required to input any information, or you may include your parish name and important contact information. The Project Team recommends you add information in this line as suggested below:</p> <p style="text-align: center;">Church of the Beloved Disciple 1310 S Center Street Ext., Grove City, PA 16127 724-748-6700 www.beloveddisciple parish.org</p>
Memo	<p><u>This is a required field and cannot be Null (blank) and cannot be changed.</u> The memo is where we are housing the required tax disclosure. The tax disclosure is approved by Financial Services and is and should remain, the same language across all parishes. What does this mean for you? Simply make sure the Null Box does not have a checkmark in it.</p>
Start Date	<p>Beginning date for your reports.</p> <p><i>Pro Tip: If you have already entered a date in the field and need to use the same date, click into the field, and select your date below.</i></p>
End Date	<p>Ending date for your reports</p> <p><i>Pro Tip: If you have already entered a date in the field and need to use the same date, click into the field, and select your date below.</i></p>
Gave at Least	<p>If you are only printing statements for people who gave a certain amount or higher, enter that figure in the Gave At Least field; otherwise, use the default value of 0. For example, you may wish to only print statements for those that gave \$250 or more during the year. In this case, you change the default "0" to "250."</p>
Sort Order	Choose from Postal Code (Zip code) or Donor Name order.
Show Letter	<p>If you wish to print the Statement Letter (i.e., cover letter), select True. If not, select False. For assistance in setting up the Statement Letter please refer to Section 1 – Setting Up the Financial Statement in Ministry Platform.</p>
Letter Date	<p>If you wish to include in the Statement Letter (i.e., cover letter) the date in which the report was generated, input the date in this field; otherwise, leave the field blank.</p>
Print	<p>You have the ability to limit the pages you wish to print. The Project Team recommends printing all pages.</p>
(Proceed to the Next Page)	

2.2. Click the **View Report** button.

Accounting Company: Beloved Disciple, Grove City
 Congregation: Beloved Disciple, Grove City
 Church Contact Info: Church of the Beloved Disciple I 1310
 Start Date: 1/1/2022
 Gave at Least: 0
 Show Letter: True False
 Print: All Pages

Memo: For federal income tax purposes, it is NULL
 End Date: 12/31/2022
 Sort Order: Postal Code
 Letter Date: 1/20/2023

View Report

Word
 Excel
 PowerPoint
PDF

Pro Tip: Use the arrows above to navigate from one report to the next. This is a useful way to ensure you have successfully captured your intended reports.

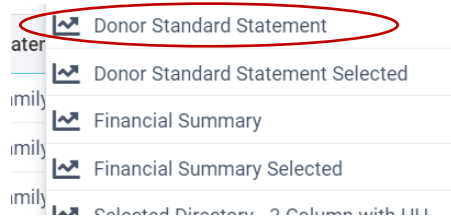
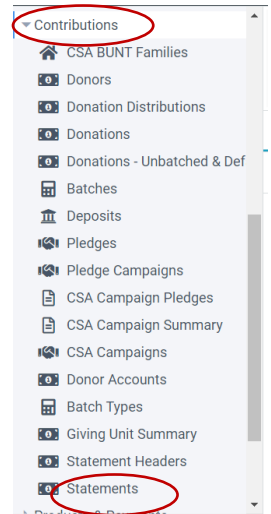
- 2.3. Click the **Save** button (diskette) and select **PDF**. Please note: The PDF may open into Adobe Acrobat, or you may see an “open file” button in the lower left corner (Chrome) or in the upper right corner (Edge.), or the reports may save directly to your downloads folder. How the information is saved by you is dependent on how your computer is set up.
- 2.4. Once the PDF has been created, please print in hard copy form or email according to your established parish process.

End of Section

3. Printing [Donor Standard Statement](#) report for all donors together

3.1. Click **Contributions** and choose **Statements**. This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.

Click the **Reports** button in the upper right corner of the screen.



3.4. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Donor Standard Statement. The table on the following page provides details regarding each field.

https://my.eriecd.org/mp/ReportViewer/ViewReport.aspx?ReportID=273&PageID=520&GlobalFilterID=17&SelectionID=26315

Accounting Company	Beloved Disciple, Grove City	Stmt Yr	2022	<input type="checkbox"/> NULL	View Report
Gave At Least	250	Sort Order	Postal		
Pages	All Statements	Group/Segment	All Segments		
Show	<ul style="list-style-type: none"> Logo <input checked="" type="checkbox"/> (Select All) <input checked="" type="checkbox"/> Payment Type (no Item Number) <input checked="" type="checkbox"/> Printed Date <input checked="" type="checkbox"/> Archived/As of Date <input checked="" type="checkbox"/> Logo <input checked="" type="checkbox"/> Letter <input checked="" type="checkbox"/> Envelope # <input checked="" type="checkbox"/> Lines 				

(Proceed to the Next Page)

Field Name	Actions and Important Notes
Accounting Company	Select your parish
Stmnt Yr	Defaults to the "Statement Cutoff date" in your Accounting Company. Refer to Section 1 – Setting Up the Financial Statement in Ministry Platform .
Gave at Least	If you are only printing statements for people who gave a certain amount or higher, enter that figure in the Gave At Least field; otherwise, use the default value of 0. For example, you may wish to only print statements for those that gave \$250 or more during the year. In this case, you change the default "0" to "250."
Sort Order	Choose from Postal (Zip code) or Name order.
Pages	You have the ability to limit the pages you wish to print. The default is set to All Statements. Note the page count does not include the Statement Letter (i.e., cover letter)
Group/Segments	Statements are divided into groups of up to 1,000. Parishes with over 1000 statements will be able to select one of six segments to generate and print. The default is set to All Segments.
Show	<p>You have the ability to add information to the Donor Standard Statement. Refer to the expanded list in the screenshot above.</p> <ul style="list-style-type: none"> • Payment Type (no Item Number): This field will display respective payment type – check, credit Card, ACH/EFT, etc. • Printed Date: Displays the current date. • Archived/As of Date: This date will typically be the date the batch was finalized. • Logo: Selecting this function will embed your parish logo in the Donor Standard Statement. If you wish to embed your parish logo, please contact Ministry Support for assistance. The Ministry Platform Support number is 800-669-2509. • Letter: Selecting this function will create the Statement Letter (i.e., cover letter). For assistance in setting up the Statement Letter please refer to Section 1 – Setting Up the Financial Statement in Ministry Platform. • Envelope #: Selecting this function embeds the Envelope Number above the total column in the Donor Standard Statement. • Lines: Selecting this function adds gridlines to the Donor Standard Statement.

3.2. Click the **View Report** button.

3.3. Click the **Save** button (diskette) and select **PDF**. Please note: The PDF may open into Adobe Acrobat, or you may see an "open file" button in the lower left corner (Chrome) or in the upper right corner (Edge.), or the reports may save directly to your downloads folder. How the information is saved by you is dependent on how your computer is set up.

3.4. Once the PDF has been created, please print in hard copy form or email according to your established parish process.

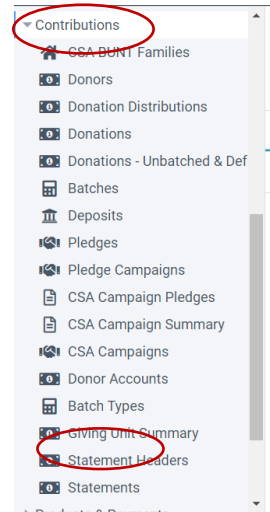
The screenshot shows a web interface for generating reports. At the top, there are fields for 'Stmnt Yr' (set to 2022) and a 'NULL' checkbox. A 'View Report' button is circled in red. Below these are dropdown menus for 'Sort Order' (set to Postal) and 'Group/Segment' (set to All Segments). A toolbar contains a 'Save' icon (diskette) and a 'Print' icon. A dropdown menu is open, showing options: Word, Excel, PowerPoint, PDF (circled in red), TIFF file, and MHTML (web archive).

End of Section

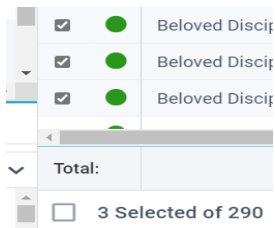
[Return to Table of Contents](#)

4. Printing [Donor Standard Statement](#) for specific donors

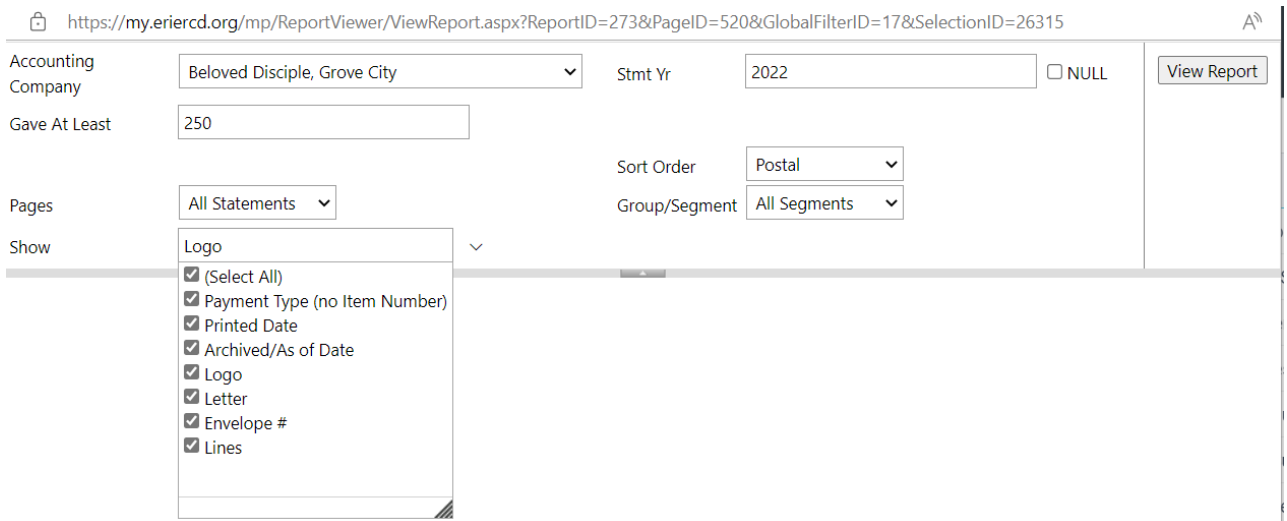
4.1. Click **Contributions** and choose **Statements**. This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.



4.2. Select the record or records you wish to print.



3.5. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Donor Standard Statement. The table on the following page provides details regarding each field.

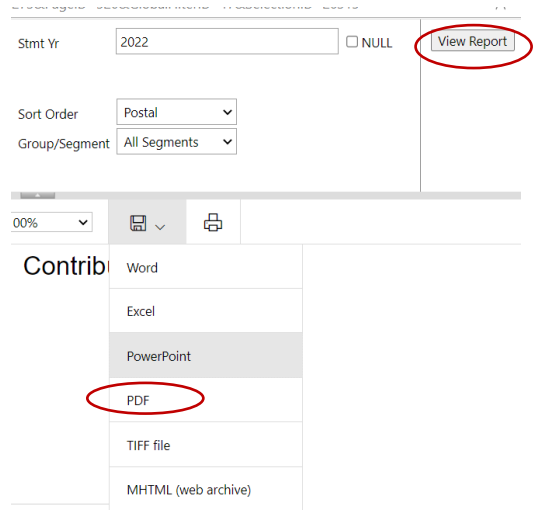


(Proceed to the Next Page)

Field Name	Actions and Important Notes
Accounting Company	Select your parish
Stmt Yr	Defaults to the "Statement Cutoff date" in your Accounting Company. Refer to Section 1 – Setting Up the Financial Statement in Ministry Platform .
Gave at Least	If you are only printing statements for people who gave a certain amount or higher, enter that figure in the Gave At Least field; otherwise, use the default value of 0. For example, you may wish to only print statements for those that gave \$250 or more during the year. In this case, you change the default "0" to "250."
Sort Order	Choose from Postal (Zip code) or Name order.
Pages	You have the ability to limit the pages you wish to print. The default is set to All Statements. Note the page count does not include the Statement Letter (i.e., cover letter)
Group/Segments	Statements are divided into groups of up to 1,000. Parishes with over 1000 statements will be able to select one of six segments to generate and print. The default is set to All Segments.
Show	<p>You have the ability to add information to the Donor Standard Statement. Refer to the expanded list in the screenshot above.</p> <ul style="list-style-type: none"> • Payment Type (no Item Number): This field will display respective payment type – check, credit Card, ACH/EFT, etc. • Printed Date: Displays the current date. • Archived/As of Date: This date will typically be the date the batch was finalized. • Logo: Selecting this function will embed your parish logo in the Donor Standard Statement. If you wish to embed your parish logo, please contact Ministry Support for assistance. The Ministry Platform Support number is 800-669-2509. • Letter: Selecting this function will create the Statement Letter (i.e., cover letter). For assistance in setting up the Statement Letter please refer to Section 1 – Setting Up the Financial Statement in Ministry Platform. • Envelope #: Selecting this function embeds the Envelope Number above the total column in the Donor Standard Statement. • Lines: Selecting this function adds gridlines to the Donor Standard Statement.

(Proceed to the Next Page)

- 4.3. Click the **View Report** button.
- 4.4. Click the **Save** button (diskette) and select **PDF**. Please note: The PDF may open into Adobe Acrobat, or you may see an "open file" button in the lower left corner (Chrome) or in the upper right corner (Edge.), or the reports may save directly to your downloads folder. How the information is saved by you is dependent on how your computer is set up.
- 4.5. Once the PDF has been created, please print in hard copy form or email according to your established parish process.



End of Section

5. [Editing Financial Statement to Correct an Error](#)

Editing a statement is certainly a necessity at times. However, the Project Team suggests you contact Ministry Platform directly to assist with any corrections. The Ministry Platform Support number is 800-669-2509.

End of Section

6. Printing labels to mail statements


End of year statements are designed for window envelopes but sometimes labels are a better option

1. Make sure you don't have any sticky selections:

- a. Click **Home** menu option and click **Selections**
- b. Check the box at the bottom of the screen to select everything listed there.
- c. Click the **Actions** button in the upper right corner and choose clear.

2. The label report requires records be check marked. Depending on the approach you took for print statements, you need to follow either step a or b below before moving on:

- a. **If you followed the instructions to print statements for ALL donors**, you didn't have to check any records. Since the label feature requires records to be selected,
 - i. check the box at the bottom of the Statements page to select everyone in the statements list.
 - ii. Proceed to step 3.
- b. **If you followed the instructions to print statements for specific donors**, you would already have certain statements checked.
 - i. Proceed to step 3.

3. Click the **Transfer** button at the bottom of the screen. 

4. Choose **Contacts (Contact Record)** and click the **Transfer** button.

5. Click OK on the Transfer Complete screen.

6. Click Reports and choose **Selected Labels: 1 per family – Erie**.

7. Select a **Name Type** (usually **Heads of House Formal** or **Heads of House Informal**).

8. Choose a **Sort Order** if desired.

9. Set a **Left Space Adjustment** if needed.

10. You may wish to uncheck the **Omit Bulk Mail Opt Out** box since this is usually a mailing the person wants to receive.

11. Click **View Report**.

12. Click the **Printer** button to print your labels.

13. Clear sticky selections by following step 1 above.