Statements

Important note: Payments in a batch finalized today will not appear on statements until tomorrow. There is an overnight process that must run.

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.

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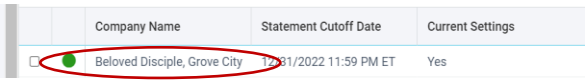
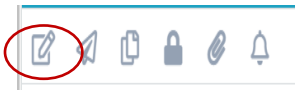
1. Setting Up the Financial Statement in Ministry Platform

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

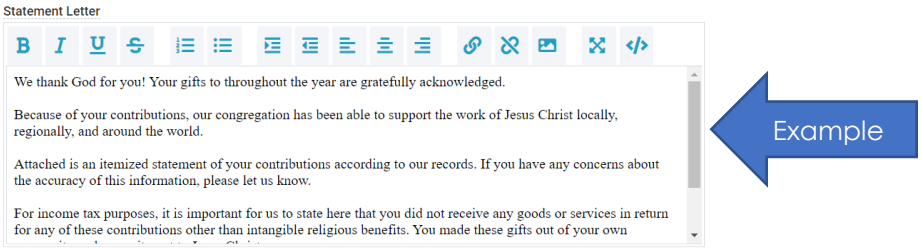
1.2. Click your **Parish Name.** This will drive you to the Statement Settings page.



1.3. **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!

1.4. 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

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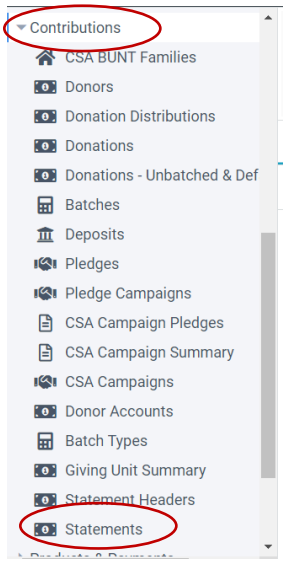
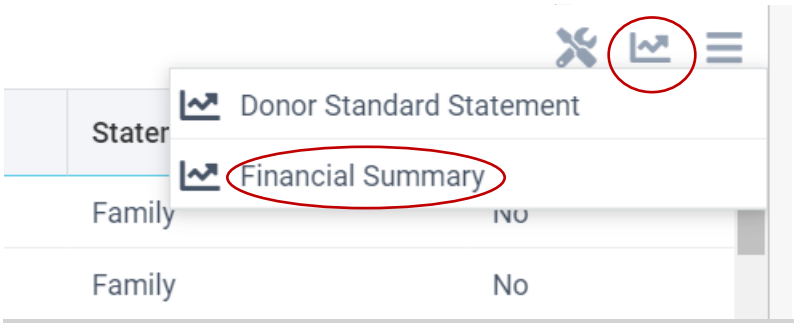
2. Printing Financial Summaries at One Time for All Donors

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)

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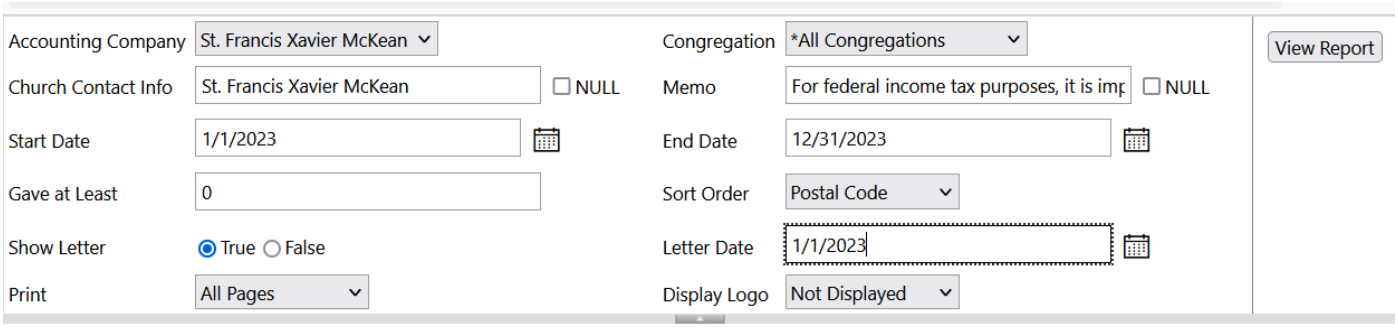
2.3. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Financial Summary. The table on the following page provides details regarding each field.



(Proceed to the Next Page)

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Field Name	Actions and Important Notes
Accounting Company	Select your parish
Congregation	Leave this set to "All Congregations"
Church Contact Info	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: Church of the Beloved Disciple I 1310 S Center Street Ext., Grove City, PA 16127 I 724-748-6700 I www.beloveddisciple parish.org
Memo	***This is a required field and cannot be Null (blank) and cannot be changed.*** 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.
Start Date	Beginning date for your reports. *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.*
End Date	Ending date for your reports *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.*
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 Code (Zip code) or Donor Name order.
Show Letter	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.
Letter Date	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.
Print	You have the ability to limit the pages you wish to print. The Project Team recommends printing all pages.

(Proceed to the Next Page)

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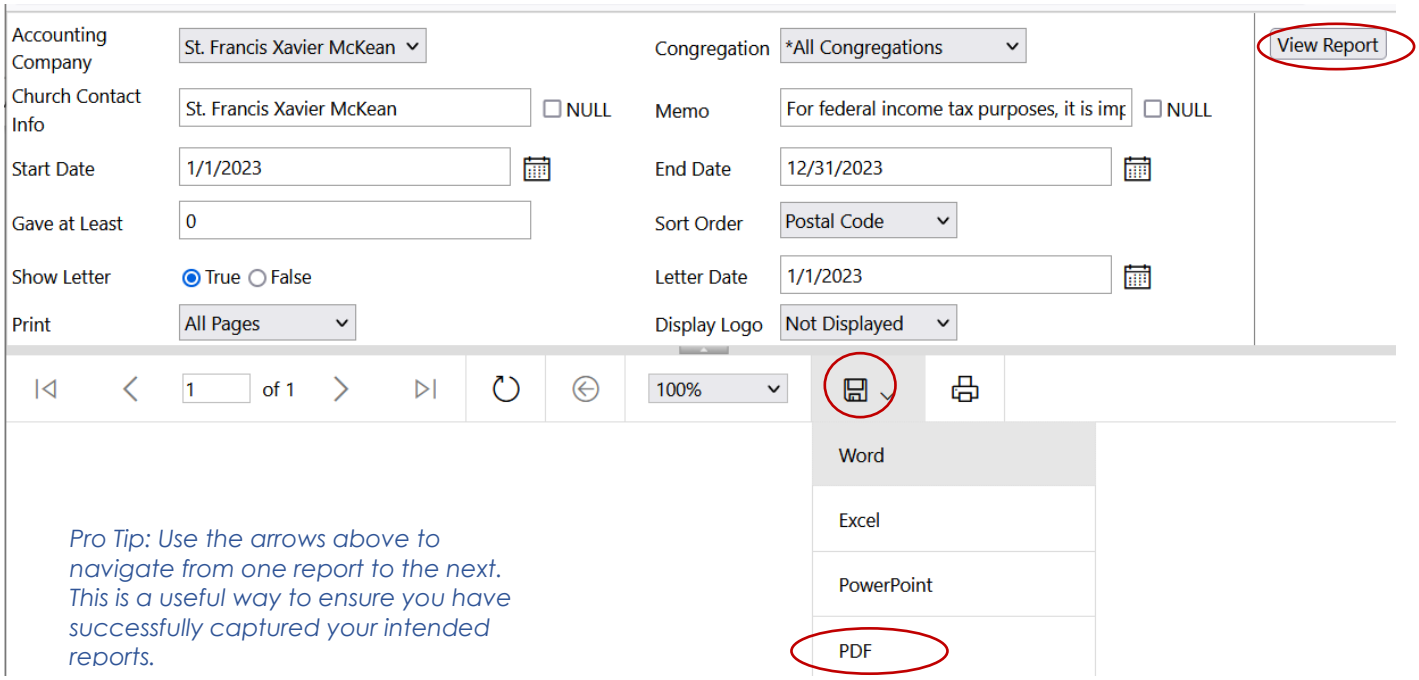
2.4. Click the **View Report** button.



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.

2.5. 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

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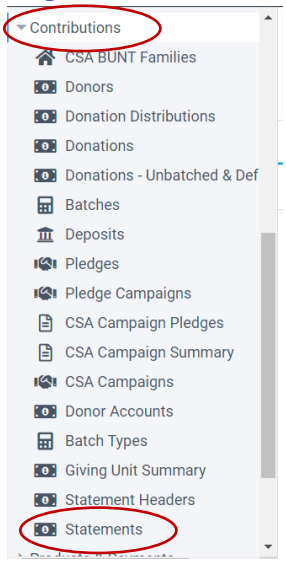
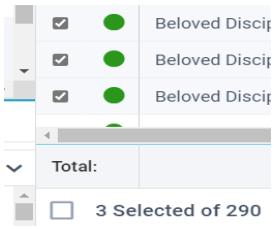
3. Printing a Financial Summary for One or More Donors from the Contribution Page

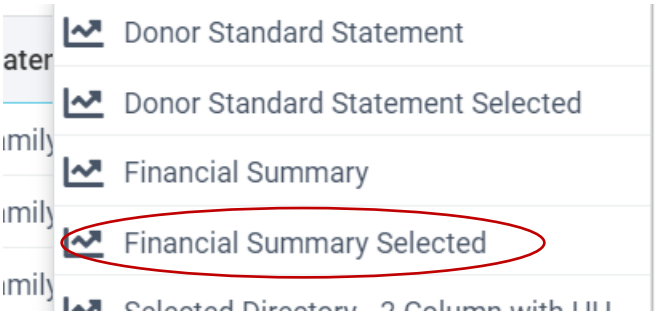
3.1. Click **Contributions** and choose **Statements.** This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.



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)

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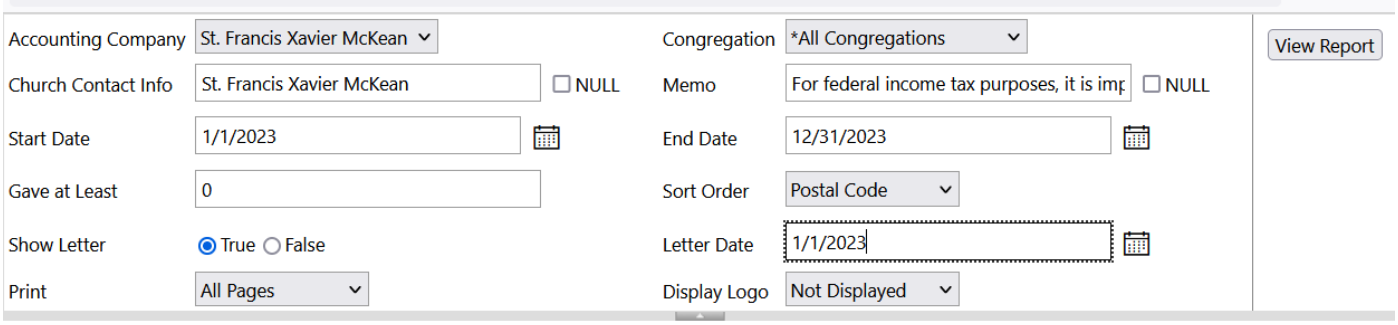
2.1. The screenshot below is an example of the Report Popup Window. Within this window you will be able to customize your Financial Summary. The table on the following page provides details regarding each field.



(Proceed to the Next Page)

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Field Name	Actions and Important Notes
Accounting Company	Select your parish
Congregation	Leave this as "All Congregations."
Church Contact Info	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: Church of the Beloved Disciple I 1310 S Center Street Ext., Grove City, PA 16127 I 724-748-6700 I www.beloveddisciple parish.org
Memo	***This is a required field and cannot be Null (blank) and cannot be changed.*** 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.
Start Date	Beginning date for your reports. *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.*
End Date	Ending date for your reports *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.*
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 Code (Zip code) or Donor Name order.
Show Letter	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.
Letter Date	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.
Print	You have the ability to limit the pages you wish to print. The Project Team recommends printing all pages.
(Proceed to the Next Page)	

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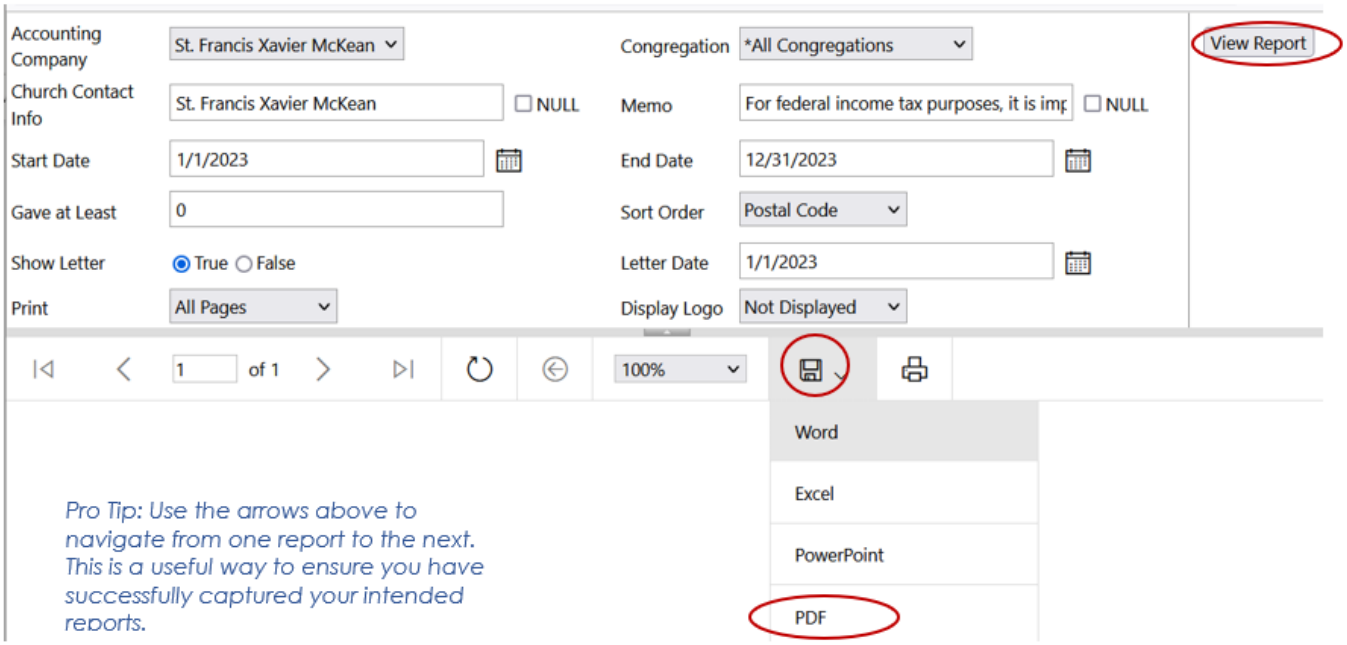
2.2. Click the **View Report** button.



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

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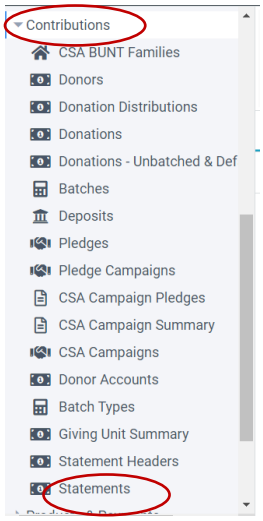
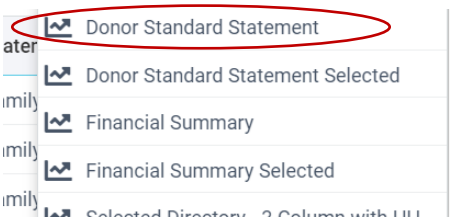
3. Printing Donor Standard Statements at One Time for All Donors

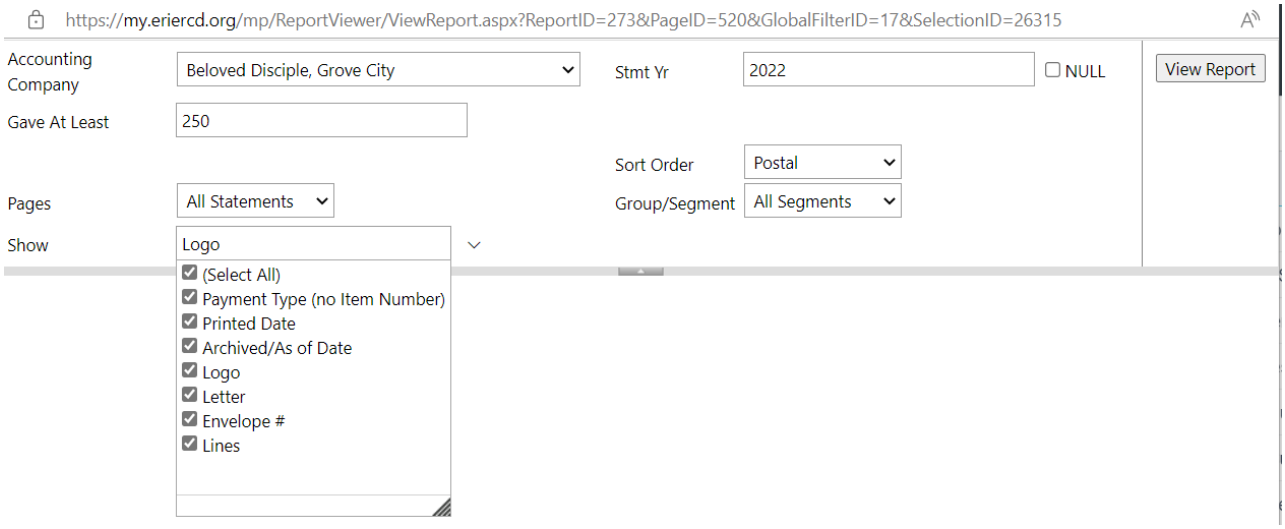
3.1. Click **Contributions** and choose **Statements.** This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.



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.



(Proceed to the Next Page)

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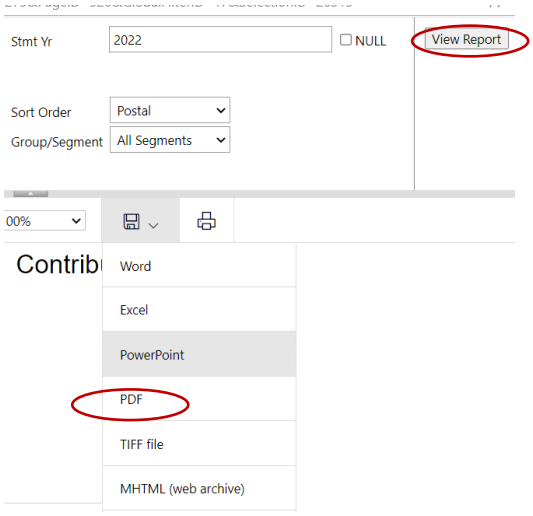
Field Name	Actions and Important Notes
Accounting Company	Select your parish
Stmt Yr	Defaults to the "Statement Cutoff date" in your Accounting Company. Refer to Section 1 – Setting Up the Financial Statement in Ministry Platform.
Gave at Least	If you are only printing statements for people who gave 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	You have the ability to add information to the Donor Standard Statement. Refer to the expanded list in the screenshot above. • **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.



End of Section

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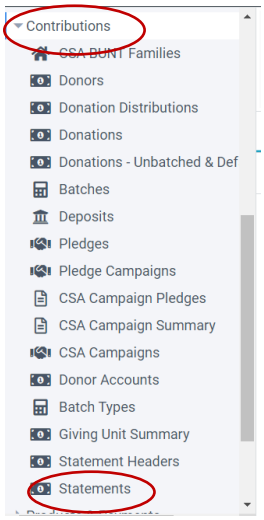
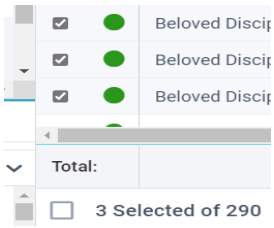
4. Printing Donor Standard Statement for One or More Donors from the Contribution Page

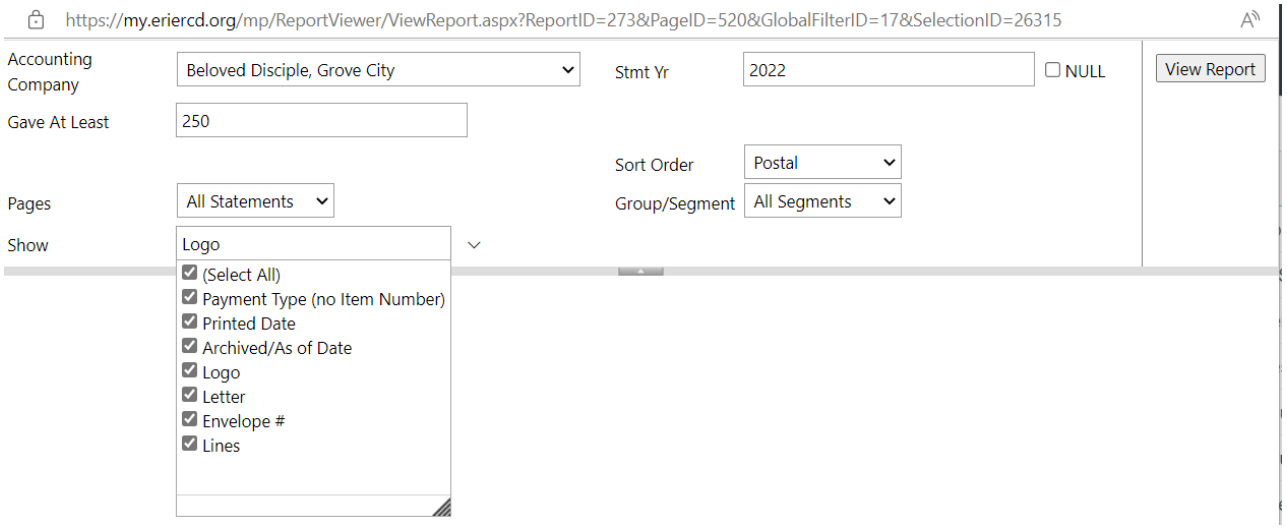


4.1. Click **Contributions** and choose **Statements.** This will drive you to the Statement page. Please note: The **Not Archived** view appears by default. Do not change this view.

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)

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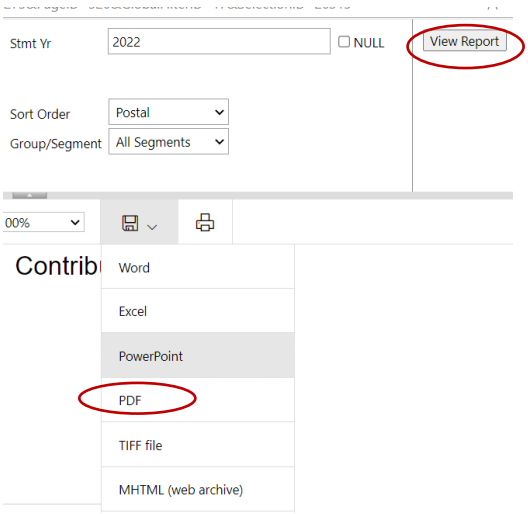
Field Name	Actions and Important Notes
Accounting Company	Select your parish
Stmt Yr	Defaults to the "Statement Cutoff date" in your Accounting Company. Refer to Section 1 – Setting Up the Financial Statement in Ministry Platform.
Gave at Least	If you are only printing statements for people who gave 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	You have the ability to add information to the Donor Standard Statement. Refer to the expanded list in the screenshot above. • **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

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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.

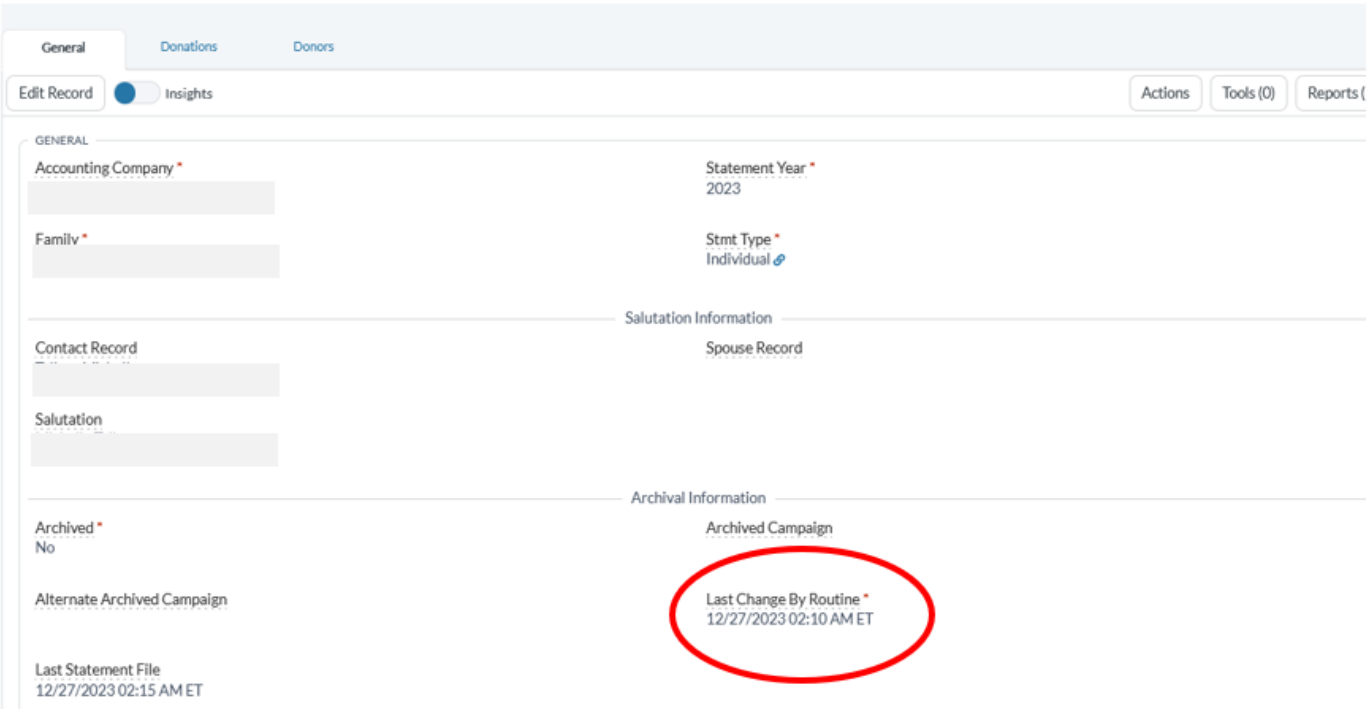
6. Forcing statements to update after changing a parishioner's giving

Note: If you added an end of year batch or updated donations for several people, you can wait to print their statements until tomorrow or you can force **all** of your statements to refresh.

1. Click **Church Structure** and choose **Accounting Companies.**
2. Open your accounting company and click the **Edit Record** button.
3. Add a blank space at the end of the **Footer** field and click **Save**. (Refresh complete in 30 minutes)

Or, if you only want to refresh one person's statement, you can follow these instructions.

4. Click **Contributions** and select **Statements.**
5. Locate the Donor and click on their statement record to open it.
6. Click the **Edit Record** button.
7. Click the "**X**" next to the **Last Change By Routine** field.
8. Click the **Stop Watch** button next to the **Last Change By Routine** field.
9. Click **Save.** (In approximately 5 minutes, the statement should be updated.)



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7. Printing Statements for current year before April 30th.

Statements for the **current** year do not appear in Contributions > Statements until May 1. Statements for last year appear as unarchived until April 30th to give you the opportunity to fix a parishioner's statement if there are errors. Keeping last year's statements open until April 30th's means you have to print statements for the current year a different way.

To print a statement for current year's giving before May 2st.

1. Click **Contributions** and choose **Donors.**
2. Search for the donor and click their donor record to open it.
3. Click **Reports** and choose **Financial summary selected.**
4. Choose your parish from the **Accounting Company** drop.
5. Enter dates for this year in the **Start date** and **End Date** fields.
6. Click **View Report.**
7. Click the **Print** button to print the statement.

End of Section

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