CREATING AND PRINTING SHELBY QUARTERLY CONTRIBUTION STATEMENTS

1. Login to Shelby using your assigned Shelby user ID and password.
2. From the My Shelby menu or the Recent Modules Used section on the Shelby Dashboard screen, double click on the Contributions Module.
3. From the Contributions Home Base screen, click on Reports.

4. Select Statements.
5. From the Parameters tab of the Contribution Statements – Format Congregation Statement screen, choose the following answers for each of the items shown in the red box below from each of the respective drop-down menus:

a. Statement Format: Congregation Statement
b. Sequence for statements: Name
c. Individuals to print: Ones with contributions or pledged.
d. Print name as: Full names
e. Use Prior Selections?: Include All Names
f. Statement Frequency?: Include All Statement Frequencies
g. Relationship to Mail to: Do Not Use Relationship
6. On the bottom part of the Parameters tab, input the following items shown in the red box below:
   a. Minimum $ amount: (10000.00) (Make sure this is stated as a negative number)
   b. Statement date: Date the statements are being created
   c. Beginning date: Date of the first day in the quarter being reported*
   d. Ending date: Date of the last day in the quarter being reported*
   e. Which Address?: Choose Use Main/Home
   f. Put a check mark next to Include Individuals Not in Membership Module and Include Anonymous Gifts. Leave all other check boxes blank.

* When preparing the year end Contributors Statements, the beginning date in c. above will be 10/1/20XX and the ending date in d. above will be 12/31/20XX.
7. At the bottom of the Parameters tab, select the Include/Exclude box.

8. On the Choose Criteria to Include/Exclude screen, choose Select All then OK.

10. Copy and paste the following line into the Header Comments field:

   a. `<<PS14>><<B+>> CONTRIBUTOR'S QUARTERLY STATEMENT<<B->>&<P->>`
11. Copy and paste the following lines into the Footer Comments field:

<<PS10>>Your generosity supports Christ's mission - Thank you!
Envelopes and other supporting documents are only maintained for one year after the contribution was made.
No goods or services were received in exchange for any contribution of $250.00 or more on this statement except for intangible religious benefits. <<P>>
12. Click OK at the bottom of the screen.

13. The Quarterly Contribution Statements will then come up. If the report is longer than 50 pages, you will get an “inquiry box” like in the illustration below. Select “Yes” so that reports are generated for all contributors.
14. To print the report click on the File menu at the top left of the screen where the Contribution Statements are showing and select Print.
15. Select the printer that you would normally use to print off batch detail reports when processing contributions. Alternatively, you can print to .pdf so that you can save the Statements to your computer’s hard drive and email the statements to your contributors. In both cases, click on the Print button to start printing or save the .pdf file.