

Printing Quarterly Contribution Statements

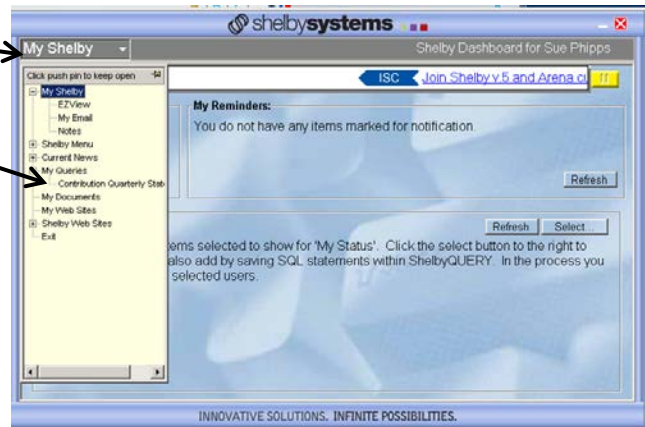
Note: These reports will be available after the end of the quarter, i.e.

April 1 for the quarter ending March 31, or July 1 for the quarter ending June 30, etc.

If you want to add a memo to your statements, refer to Steps 12-15 (**Adding a Memo to Statements**) for instructions before proceeding. If you do not want to add a memo, continue with Step 1.

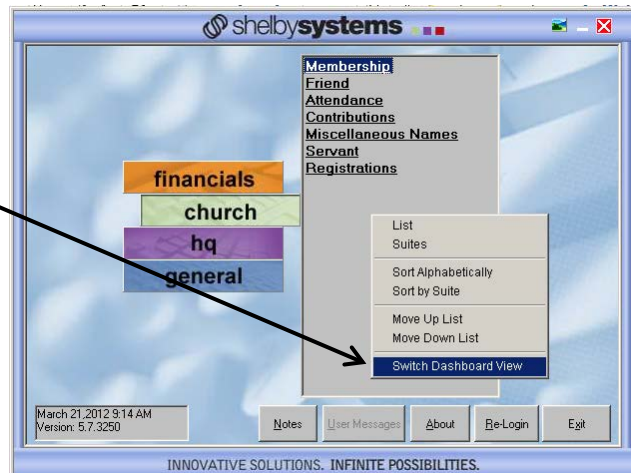
1. On the Home Screen, click on “My Shelby.”
2. Choose “My Queries” and then “Contribution Quarterly Statement”.

There is no longer a separate report for the annual statement. When the quarter ending date of December 31 is selected the report title becomes “Contributor’s Annual Statement”.

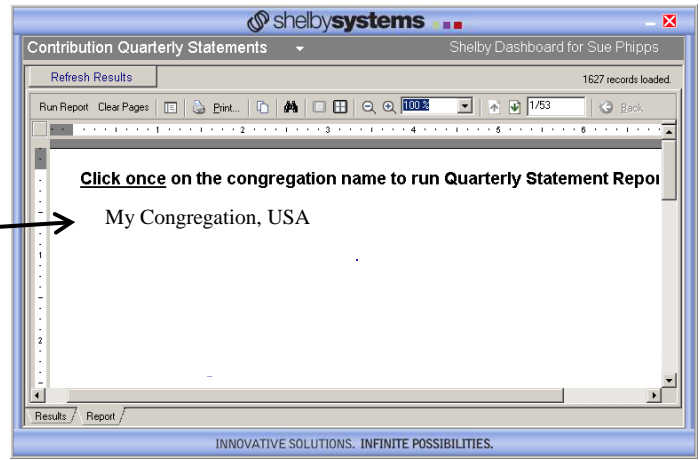


If you don't see “My Shelby” at the top of your screen, **right click** in the center of the screen and choose “Switch Dashboard View”.

Once you see your Dashboard, continue from Step 1.



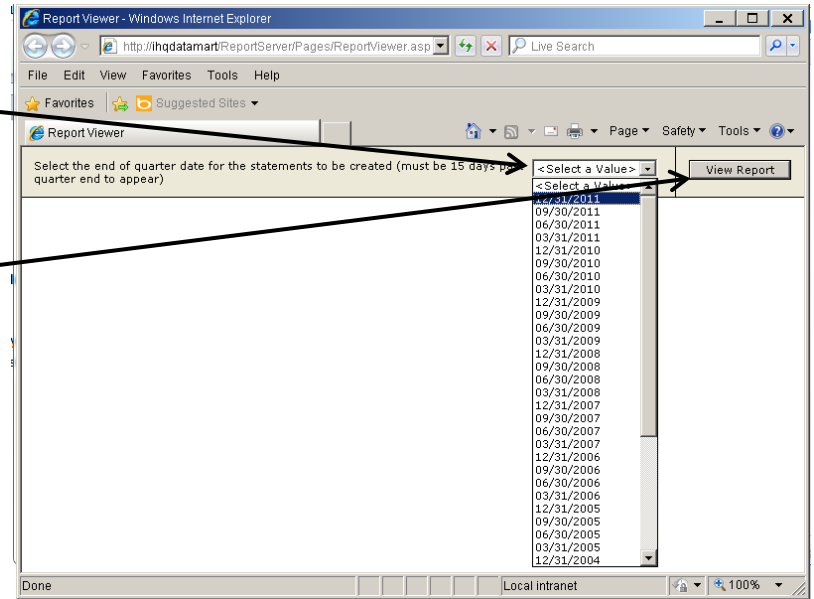
3. Single click on your congregation.



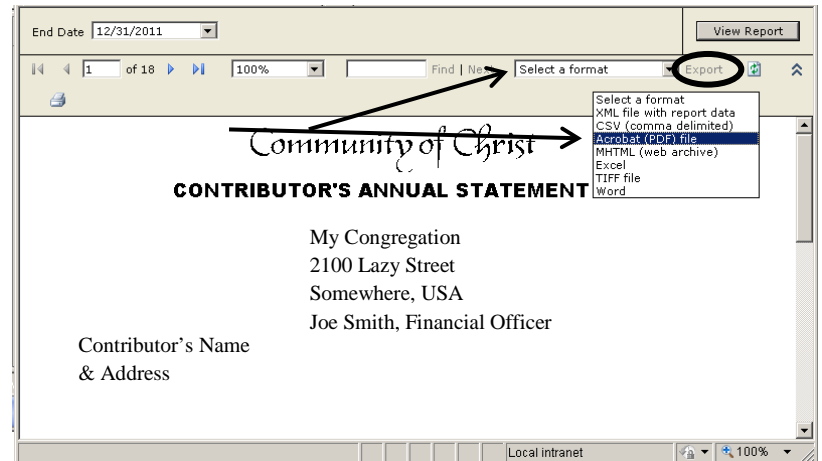
4. Click on "Select a Value".

5. Choose the quarter you wish to report and click "View Report".

Note: Quarter ending date will not appear until the day after the end of the quarter.

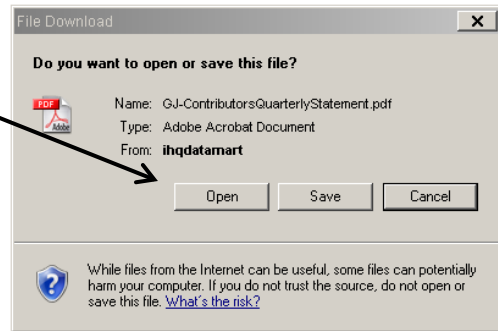


6. To print, click on "Select a format" and choose "Acrobat (PDF) file" and then click "Export".

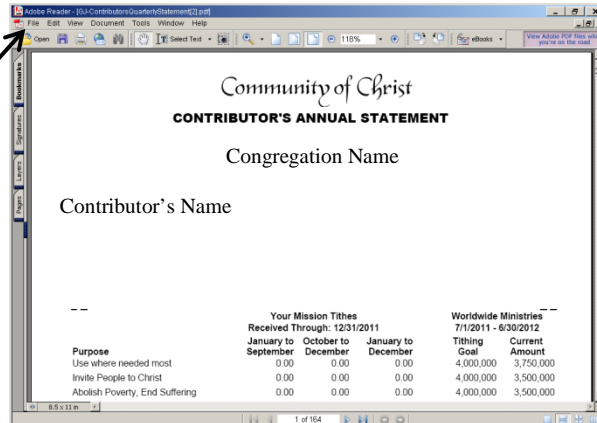


7. Click "Open"

Acrobat Reader will open and you will see all of your statements.

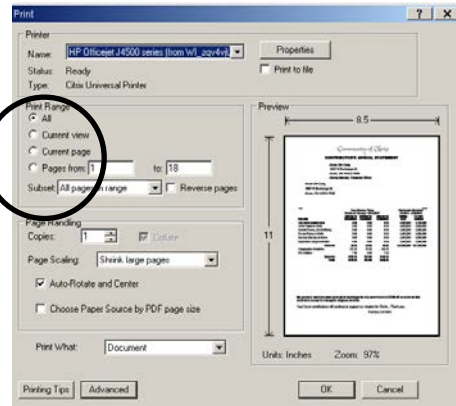


8. From this screen you can choose "File" and "Print".



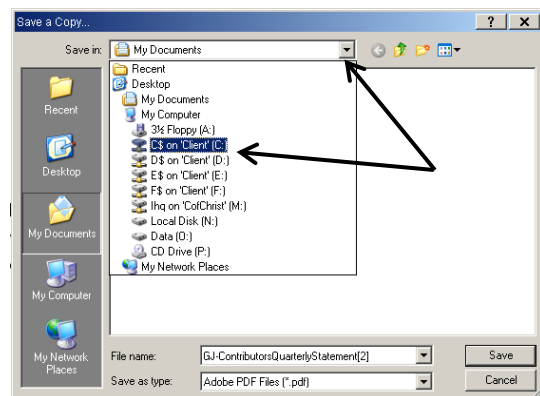
When printing you have the option to print all statements or a select few. That option will be available on the print screen which appears after you select "Print".

*Your print screen may look different depending on the make of printer.

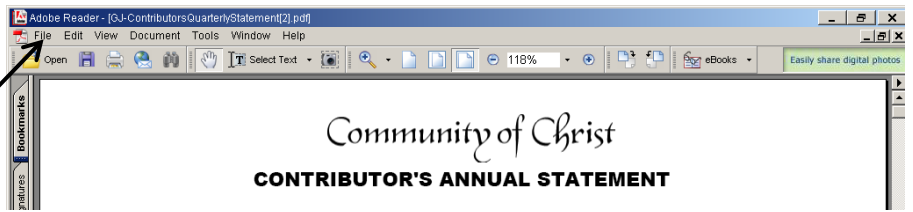


To save to your hard drive click on "File" and choose "Save a Copy" and then click on the down arrow by "My Documents" and select "C\$ on 'Client' (C)" which is your hard drive.

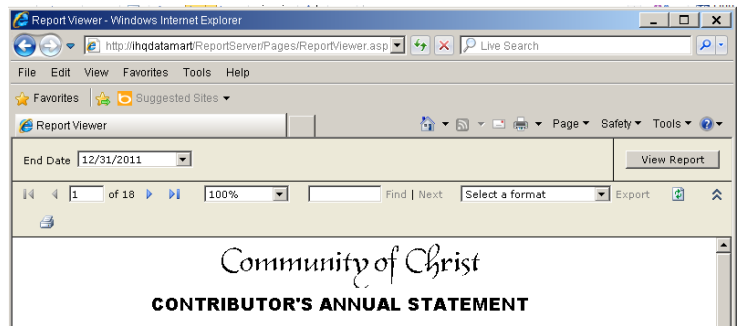
Find your "My Documents" folder and save.



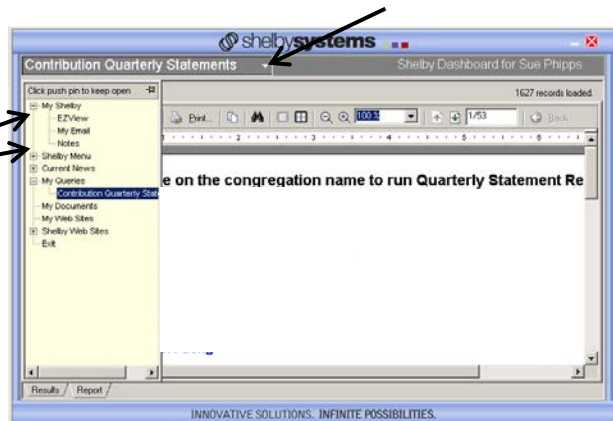
9. Once you have saved or printed your statements, close the Acrobat Reader screen by choosing “File” and “Exit”.



10. Close the Report Viewer the same way.



11. To return to your Shelby Dashboard, click on the down arrow by “Contribution Quarterly Statements” and choose “My Shelby.”



To return to Shelby Menu click on “Shelby Menu”.

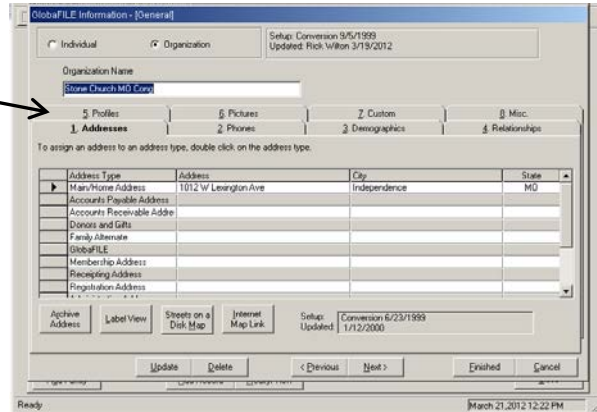
If you click on the Red X it will close Shelby and you will have to log in again.

Adding a Memo to Statements

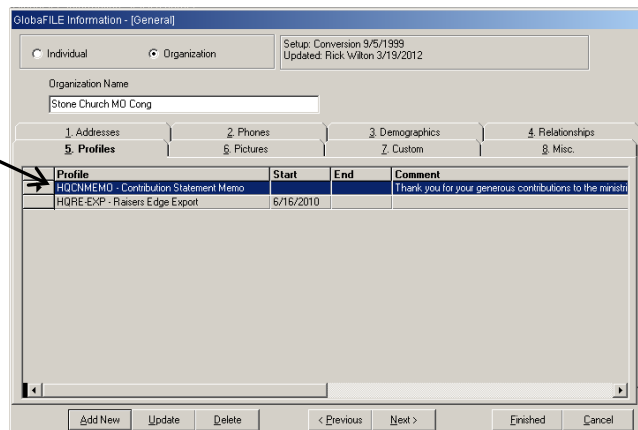
12. Before running your statements, go to GlobaFile and find your congregation.



13. Click on the Profile tab.



14. Double click on "HQCNMEMO – Contribution Statement Memo".



15. Type in the memo you would like to appear on your contribution statements. (Memo field is limited to 300 characters.) Click "OK".

On the next screen click "Finish".

Click "Close" on the next screen.

You are back to the "GlobaFile (Home Base)"

Return to Step 1 to continue with Printing Quarterly Contribution Statements.

