

# THE ROMAN CATHOLIC ARCHDIOCESE OF ATLANTA



On the **Fund** tab, select the desired funds:

Description	Fund #
<input type="checkbox"/> Air Conditioning	20-22-01
<input type="checkbox"/> All Saints	10-11-01
<input type="checkbox"/> All Souls	10-11-02
<input type="checkbox"/> Angels Food Fund	12-25
<input type="checkbox"/> Ascension	10-11-03
<input type="checkbox"/> Ash Wednesday	10-11-04
<input type="checkbox"/> Assumption of Mary	10-11-05
<input type="checkbox"/> Bingo	50-53
<input type="checkbox"/> Bishops Overseas Appeal	30-30-05
<input type="checkbox"/> Black and Native American	30-30-10

Page 1 of 7 (66 Records) < 1 2 3 4 5 6 7 >

\* All funds listed are tax-deductible

Next ▶

Choose the top check box to select all tax-deductible funds

2. Select the **Filters** tab. Then, select the desired filters (for example, the date range, type of report, membership types) to set up the report. To include the list of \$250 or greater, one-time contributions, please make sure you select Summary Report Format and check the box next to "List contributions of \$250 or more."

Options

Report Format: ☐ Detailed ☒ Summary

Delivery Format: ☒ Paper Statements ☐ Electronic Statements

Sorting: Totals: Fund Alpha Ascending

Filters

Dates: 1/1/2018 to 12/31/2018

Amount: Minimum: \$ Maximum: \$

☐ Include \$0 Contributions

☒ List contributions of \$250 or more

Membership: Family Registration: Both Family Group: All Groups Family Workgroups: All Groups Member Workgroups: All Groups

Contribution Source: ☒ Family ☐ Member

☒ Include Member Contributions in Family Statements

Givers: ☐ Show filtered givers ☒ Show all ☐ Show all except filtered givers ☐ Show non-givers

◀ Previous Next ▶

### 3. Select the **Template** tab.




On this tab, you can create a customized message to accompany your statements. You can also add a signature image to your statements. Each of these tasks is optional.

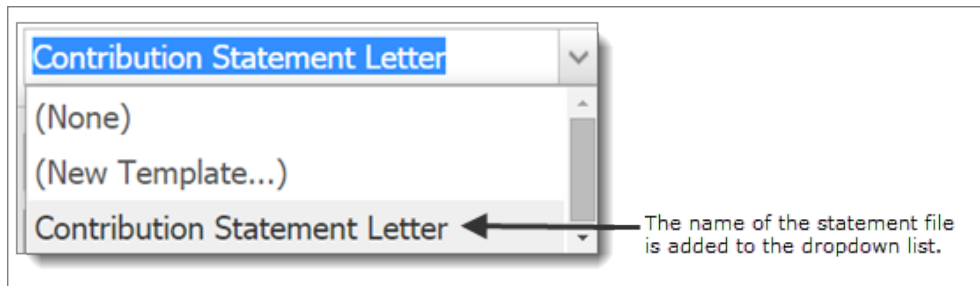
Although a customized message and signature typically go together, you can choose to include one without choosing to include the other.

If you are adding a signature image, you must have the file on your local hard drive that contains the image of the signature you want to use.



If you want to include a statement or message, choose one of these four options:

- Create a customized message.

To do this, under Body of Statement, click . From the dropdown list, select (New Template...). In the text field, type the text of your message and apply the desired formatting (for example, select a font and font size). When done, click inside the text field to the left of the Save button (), type a name for the file, and then click  to save it. The name of the statement file is added to the dropdown list, as shown in the following illustration:


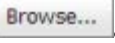
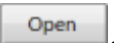



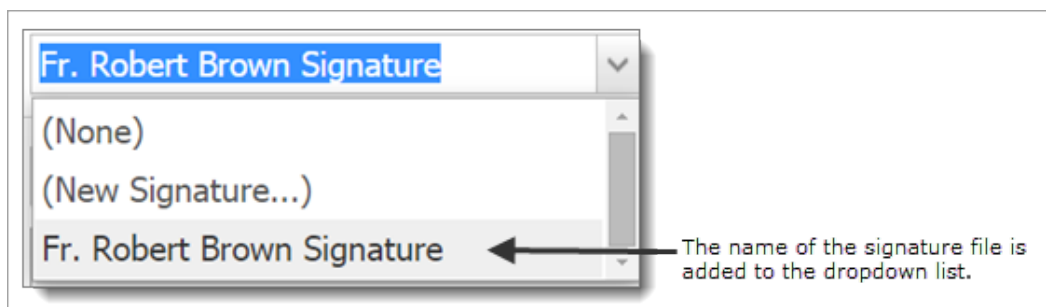
- Use a previously created customized message.

To do this, under Body of Statement, click . From the dropdown list, select the name of a previously saved message file. The text of the message appears in the text field. If desired, you can edit the message and re-save it under the same or a different name or you can remove it from the dropdown list by clicking .

- Add a new signature image to your statements.


You can add a signature image only if you already created and saved a signature image file on your computer.

To do this, under Signature, click . From the dropdown list, select (New Signature...). Then, click  and locate the signature file on your local computer. Select the file, and then click . The application uploads the image and displays it in the Image Preview box. Finally, click inside the text field, type a name for the file, and then click . The name of the file is added to the dropdown list, as shown in the following illustration.



Each time you save a signature file, the application adds the file name to the Signature dropdown list. You can add up to five file names to the list.

- Add a previously saved signature image to your statements.

To do this, under Signature, click . From the dropdown list, select the signature file. The application uploads the image in the file and displays it in the Image Preview box.


Select the **Givers** tab. From the list, select the names of givers for whom you are preparing statements.

To select all givers on Page 1, select the checkbox in the header (to the left of Family Name). To select all givers on all pages, select the Select all # records link that appears in the highlighted area under tabs.

Fund Filters Template <b>Givers</b>				
<input type="checkbox"/>	Family Name	Primary Address	Env #	# of Funds
<input type="checkbox"/>				
<input type="checkbox"/>	Aalanda, Thomas	2516 Aldringham Rd	303	<a href="#">1</a>
<input type="checkbox"/>	Adrian, James and Victoria	1038 Hiale Court	311	<a href="#">1</a>
<input type="checkbox"/>	Abanto, Donnell and Julie	216 Torrington Drive	315	<a href="#">1</a>
<input type="checkbox"/>	Babel, James and Maureen	1203 Harrow Road	29	<a href="#">2</a>

7. Click **View Statements** to generate your statements.

#### Step 6. Print, View, and Save the Statements

After you click **View Statements**, the statements you created are shown in the Report Viewer. You should save this file using the  icon at the top right hand side of the report viewer (pdf format recommended). Once saved, and reviewed, the file is ready to print.

**HINT:** If you have a large quantity to print depending on the capacity of your printer, you might want to print the statements in batches.