



Contribution Statements

Contribution Statements are generated for your donors; one statement per donor, pulling the donation criteria you choose. Statements can be both printed and emailed (as PDF attachment).

Contribution Statement		DonorSnap Training				
Donation Period: 01/01/2019 to 01/08/2020		123 Any Street Medford, OR 97504 www.donorsnap.com Tax ID 93-1234567				
Andrew Taylor 6432 Six Forks Raleigh NC 27610						
Donation Type Date	Campaign	Appeal	Accounting Code	Contribution Amount	Value Received	Tax Deduction
1/16/2019 Donation	Capital Campaign		400800 - General Fund	100.00	0.00	100.00
2/27/2019 Event Registration		Golf Tournament	400802 - History Programs	100.00	0.00	100.00
4/24/2019 Donation	Capital Campaign			50.00	0.00	50.00
4/26/2019 Donation	Building Addition	Spring Appeal	600100 - Building Fund	200.00	0.00	200.00
8/15/2019 Event Registration	Capital Campaign	Golf Tournament	400800 - General Fund	150.00	75.00	75.00
12/18/2019 Membership Dues	Membership			25.00	0.00	25.00
Total Contributions:				625.00	75.00	550.00

Print Statements

Reports > Donation Activity > Contribution Statements

Date Filters

Date Filters

Date Selection Donation Accounting

Start Date

End Date

Choose to print statements with donations based on the **DonationDate** field OR the **AccountingPeriod** date field.

Most organizations will use the standard **DonationDate** as the date filters for statements. However, if you use the **AccountingPeriod** for donations, change to that date accordingly if needed.



Contact Filters

Contact Filters

DataMiner Batch	Limit Contacts by Selecting Batch ... <small>(A contact)</small>	▼
Main Contact Label	Acknowledgement	▼

Print statements for only those in a DataMiner Platinum batch you have created (such as only those that gave multiple times, or those that gave over a specific dollar amount).

Select your Main Label (most will use the default of the Acknowledgement field)

For more detailed groups (such as all those Contacts without email addresses), run a DataMinerBatch first to select your criteria, and instead of choosing your filter options here, limit the Contribution Statements to those within your batch.

Choose your **Main Contact Label** (statements can print either the Acknowledgement or Envelope Lines, depending on which you use). Most will use the default **Acknowledgement** field.

Donation Filters

Donation Filters

Donation Type	All items checked	▼
Campaign	All items checked	▼
Appeal	All items checked	▼
Accounting Code	All items checked	▼
Payment Method	All items checked	▼

Choose which Donations to include or exclude in the Statements based on **DonationType** (for example some might exclude non-tax deductible payments such as Event Tickets or Retail purchases; others might exclude Grants), and other Donation detail fields.



Other Report Settings

Other Report Settings

Report Orientation Portrait Landscape

Field 1 Donation Type ▼

Field 2 Campaign ▼

Field 3 Appeal ▼

Field 4 Accounting Code ▼

Show YTD Contributions

Show \$\$\$ Columns Contribution Amount, Value Rec'd, Tax Deduction Contribution Amount

Order By Last Name, First Name Zip, Last Name, First Name

Footer (Note: Statement Report Footer Comment Approx. 4 Lines)

*Times 16 A B I U abc

DESIGN </> HTML PREVIEW

1. Choose the orientation of your paper and the fields to include in the statement: Landscape allows 4 fields Portrait allows 3 fields. If you choose Portrait you can also choose to format specifically for window envelopes

2. The Statements will automatically total all donations. However if you are not printing at the end of the year, consider including the Year-To-Date Contribution total as well.

3. Choose what financial columns to show. If you use the Value Received field for non-tax deductible portions of payments, show the Amount, Value & Tax Deductible. Or limit it to only showing the Amount.

4. Choose the Sort Order of your statements, by Last name or Zip Code

5. Type the 4-lines of Footer information to be included on all statements.

Export

View Report

Notes:

- Excel includes extra fields like addresses.
- In order to schedule an emailed report, you must first save it.

Generate ONE large PDF, including the 1-2pg statements per donor.

Export to Excel to mail merge in to Word for attached letters or mailing labels. Will generate in the same order as your statements for easy collating.



DonorSnap

Donor Management Made Easy

Customize the Company Information fields

<p>Contribution Statement</p> <p>Donation Period: 01/01/2019 to 01/08/2020</p> <p>Andrew Taylor 6432 Six Forks Raleigh NC 27610</p>	<p>DonorSnap Training 123 Any Street Medford, OR 97504 www.donorsnap.com Tax ID 93-1234567</p>
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Maintenance > Site-Setup > Site-Information

The top FIVE fields of your Site Name & Address are pulled in to the Contribution Statements. While the titles of the fields say "Address 1-2-3", you can put whatever information you want in those fields, such as Tax ID#, Website, Email, etc. The field names do not carry to the statement.

You cannot upload logos or images to the Contribution Statement.



Use DataMiner Batches

Contribution Statements allow you to filter DonationTypes and Date-Ranges, but what if you want to take that a step-further?

Create a report in **DataMinerPlatinum**. For example, only those who donated \$250 or more in 2019.

Once that report is created and saved, now when you go to run Contribution Statements, select **DataMinerBatch** to select the created report, and generate statements only for that criteria.

Contact Filters

DataMiner Batch Limit Contacts by Selecting Batch ... (Note: DataMiner Platinum Batch must only have 1 record per ...)

Main Contact Label DMP000100 - Donors who gave \$250 or more 2019

DMP000095 - Board Members

DMP000043 - All Emails

DMP000001 - All Contacts

Donation Filters

If Emailing Statements (**Processing > Contribution Statement Email**) on the **Donation Filters** tab, select the **DataMiner Batch** drop-down:

E-Mail Contribution Statements

Current Statement : 4 - January Statements

STATEMENT LISTING E-MAIL SETTINGS **DONATION FILTERS** CREATE PDF STATEMENTS RECORDS SENT

Save Reset

Date Selection: Donation Accounting

Donation Date Start: 1/1/2020

Donation Date End: 12/31/2020

DataMiner Batch Limit Contacts by Selecting Batch ... (Note: DataMiner F ...)

Main Contact Label DMP000100 - Donors who gave \$250 or more 2019

Show \$\$\$ Column DMP000095 - Board Members Contribution Amount

Orientation: DMP000043 - All Emails

Field 1: Type DMP000001 - All Contacts

Field 2: Campaign 000001 - Manage Documents

Field 3: Appeal

Donation Type: All items checked

Campaign: All items checked

Appeal: All items checked

Accounting Code: All items checked

Payment Method: All items checked



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Donor Management Made Easy

When would you use this?

Many organizations do not send statements to all donors.

1. Remember that DonorSnap can email contribution statements. Once you've emailed statements to all those contacts with a valid email address, you might now need to Print statements for all those without an email address. Build a DataMinerPlatinum report of all contacts without an email address.
2. Some organizations prefer to send statements to those donors whom have given over a certain amount (such as YearToDate donations over \$100). Build a DataMinerPlatinum report of YTD donation amount of \$100 or more.
3. Sending statements to only those donors who've donated more than once throughout the year. Build a DataMinerPlatinum report counting how many times the contact made a donation.

Contacts Without Email Address

- DataExport – Contact
- FieldExport - **Note that you do not need to export Contact information fields (such as name, address, amount of donation). You only need fields necessary to build your query. For this example, drag **Email Address** only.
- Review Data – using the filter dots next to the **Email** field, choose “Is Empty”. Click **Filter**. Then **Save**.

Donors Who Have Given \$100 or more

- DataExport – Contact (because the YTD Donation amount is located on the Contact tab)
- FieldExport - **Note that you do not need to export Contact information fields. You only need fields necessary to build your query. For this example, drag **YTD Donation Amount** only.
- Query – Build a query of **YTD DonationAmount >= 100** OR use a filter on the Review Data Tab
- Review Data – If you do not want to use a query, Type 100 in the data-entry box under **YTD DonationAmount**. Use the filter dots next to the data-entry box to select “Greater Than or Equal To”. Click **Filter**. Then **Save**.

Contacts Whom Have Donated More Than Once This Year

- DataExport – Donation, and Summary (because we are filtering Donations made, AND need to have each contact listed only once)
- Field Export – You do not need contact fields (Name, address, etc.). Because we are Counting how many times a Donor appears on the list, drag the **DonationContactIPK**. In the Aggregate box to the right, select **Count**.
- Query – limit your date range, DonationDate BETWEEN 1/1/2019 and 12/18/2019
- Review Data – Use the filter dots next to the data-entry box. Type 2. Then choose “Greater Than or Equal To”. Click **Filter**. Then **Save**.



Email Contribution Statements

Processing > Contribution Statement Email

This process will generate stock, merged (*for example, will say "Dear Bob"*) emails to your donors. Contribution Statement will be attached as a PDF, and appear the same as the printed statements do under Reports > Donation Activity > Contribution Statements.

+ Add New Contribution Statement Listing

Edit	Listing #	Name	E-Mail Method	Processing Statements	Total Statements	Statements Processed	Sending E-Mails	E-Mails Sent	Delete
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Create Statement Listing from #

Template *Select a template...*

Name

Use Contact E-Mail Address E-Mail, E-Mail2

Statement Report Footer Comment

DESIGN HTML PREVIEW

Insert Cancel

1. Click **Add**.
2. **Name** your BATCH of emails (*such as All, or Testing, or Donations Over 100*)
3. You can add FOUR sentences as a footer to the Contribution Statement. This footer will be the same for each statement. Type this in the **Footer** box.
4. Click **Insert**.

Email Settings

E-Mail Contribution Statements
Current Statement : 3 - January2020

STATEMENT LISTING | E-MAIL SETTINGS | DONATION FILTERS | CREATE PDF STATEMENTS | RECORDS | SENT

Save | Reset | Mail Merge Fields

From E-Mail: jloops@donorsnap.com
(Note: if 'From E-Mail Address' is empty, the donor will receive an E-Mail from 'no_reply@donorsnap.com')

* Subject Line: 2019 Tax Statement from DonorSnap

Insert Logo

Message (Body):

Dear «First»,
Please find attached, a PDF of your Contribution Statement to DonorSnap for 2019.
In 2018, We accomplished.... Big Huge Email...
You might need Adobe reader to open this.

DESIGN | HTML | PREVIEW

Note: Drag drop Fields to editor.

- AccountingCode
- Acknowledgement
- Active
- Address1
- Address2
- Address3
- Anonymous
- Cell
- City
- Company
- ContactComments
- ContactKey
- ContactType
- Country
- DonationAmountLast
- DonationAmountLTD

1. Customize your email on the **Email Settings** tab.
2. Type a **From** address (in case they reply); or it will be sent from the no_reply@donorsnap.com email address
3. Customize the Subject Line
4. Type the **Message** of your email.

Insert Merge Fields from the box on the right.

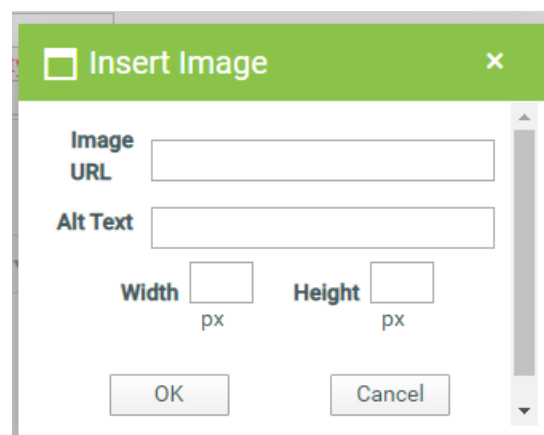
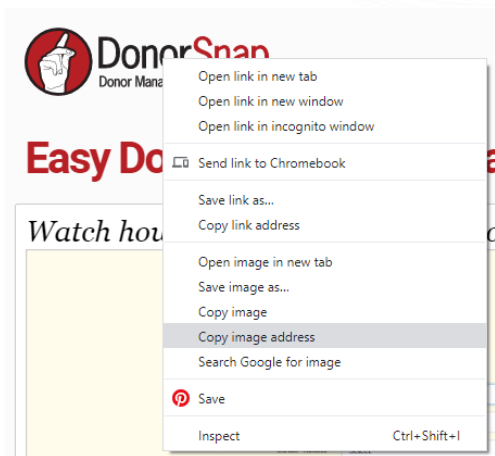
Such as Dear <Salutation> (will insert the first name of your contact), or DonationAmountPriorYear will insert the total of their giving for last year.

The Text Editor is similar to others throughout DonorSnap: Insert Bullets and Numbers, Tables, Links. Change font sizes and colors, paragraph justifications, and insert images.

Inserting Images

You can insert images (logos, pictures, design characters, etc.) in to your emails. However, files **must be on the internet. You cannot upload files directly from your computer.**

For example, our website (DonorSnap.com) has our DonorSnap logo on it. I can **RIGHT-click** on that image that my company owns (and you can do the same for images your organization owns and has uploaded to its website), and **Copy Image Address**.



Then back in DonorSnap, click the **Insert Image** button, RIGHT-click in the “Image URL” field and **Paste**.



Donation Filters

Current Statement: 10 - January 2020

STATEMENT LISTING E-MAIL SETTINGS **DONATION FILTERS** CREATE PDF STATEMENTS RECORDS SENT

Date Selection: Donation Accounting

Donation Date Start: 6/1/2018

Donation Date End: 12/31/2019

DataMiner Batch: Limit Contacts by Selecting Batch ...

(Note: DataMiner Platinum Batch must only have 1 record per contact)

Donation Type: 8 items checked

Campaign: All items checked

Appeal: All items checked

Accounting Code: All items checked

Payment Method: All items checked

Main Contact Label: Acknowledgement

Show \$\$\$ Columns: Contribution Amount, Value Rec'd, Tax Deduction Contribution Amount

Orientation: Portrait Landscape

Field 1: Type

Field 2: Campaign

Field 3: Appeal

Field 4: Payment Method

1. Use the **Donation Filters** tab to set your criteria of WHOM to send statements to.
2. This is the same as the printed statements (Reports > Donation Activity > Contribution Statements). See above
3. Select your criteria (including DataMinerBatch option). Click **Save**.

Create PDFs

Current Statement: 10 - January 2020

STATEMENT LISTING E-MAIL SETTINGS DONATION FILTERS **CREATE PDF STATEMENTS** RECORDS SENT

[Instructions](#)

1. Click the button below to begin generating your batch of PDF's. Batches of 10 or less will start immediately, and larger batches will be put in the server's queue.
2. The server starts processing large batches every few minutes. Please check back in five minutes to see if your batch has completed or the Listing tab to see the current progress. (The page does not automatically refresh.)
3. When the process is complete, move to the Records tab to send your emails.

This page does not automatically refresh. Switch tabs or reload the page to see the current status.



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- This will generate **one PDF per donor**, which will then be attached to their email. If you are doing small batches, such as my example of 13, it will only take a few seconds, listing the status when is completed.
- If you are processing a large batch, for example 2000 statements, it might take considerably longer (even over an hour or two). Start the process by clicking the **Create Statements** button. You can leave the page; You can leave the program. Check back periodically for the status.

If you leave the page, when you return to check on the status of the Processing Statements, you only need to return to the **Listing tab**.

For your batch, the Listing page will show how many statements are included in the batch, how many have been processed, and **Yes** if it is still processing statements.

E-Mail Contribution Statements
Current Statement --> 1 - Testing Tuesday

Statement Listing | E-Mail Settings | Donation Filters | Create PDF Statements | **Records** | Sent

Save | Cancel Changes | Send Contribution Statement E-Mail to ALL Selected Contacts

Current Settings: Showing Items 1 to 13 of 13 (Items Selected: 3)

Contact #	Send To E-Mail	Last Name	First Name	Company	Acknowledgement	Contribution Statement
<input type="checkbox"/>		Allen	Jennifer	Allen Automotive	Jennifer Allen	PDF
<input checked="" type="checkbox"/>	dirmiles@email.com	Anderson	Miles		Dr. Miles Anderson	PDF
<input type="checkbox"/>		Bell	Jordan		Jordan Bell	PDF
<input checked="" type="checkbox"/>	gwenbradley@gmail.com	Bradley	Gwen		Mr. Gwen Bradley	PDF
<input checked="" type="checkbox"/>	paulbrown@email.com	Brown	Paul and Irene		Mr. Paul and Irene Brown	PDF
<input type="checkbox"/>		Clark	Gregg & Pauletta		Mr. Gregg & Pauletta Clark	PDF
<input type="checkbox"/>		Dekle	Rhys		Mr. Rhys Dekle	PDF
<input type="checkbox"/>		Hyatt	Jeremy		Jeremy Hyatt	PDF
<input type="checkbox"/>		Martin	James		James Martin	PDF
<input type="checkbox"/>		Perry	Michael & Joanna		Mr. Michael & Joanna Perry	PDF
<input type="checkbox"/>		Price	Dan		Dan Price	PDF
<input type="checkbox"/>		Smith	Jim		Mr. Jim Smith & Theresa Jones	PDF
<input type="checkbox"/>		Van Kirk	Beau	Van Kirk Professionals	Beau Van Kirk	PDF

1. The **Records** tab is the final stop to pick & choose who receives statements, and to Send.
2. My batch is listing out the **13** records included in that batch. Notice to the left, that the program has only checked those names that have **Email Address** in their record (only those with email addresses on their contact screen can be sent email contribution statements). So while I have 13 in my batch, only 3 will receive an email.



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3. Click on an individual on the list, click the **PreviewEmail** button.
 - a. This will give you a Preview of the email to be sent to that Individual.
 - b. You can choose from that point to send only that email to that individual.
 - c. Choose to send a **Test** email to yourself.
4. Click on an individual on the list, click the **PDF** button to view their PDF statement.
5. When you've decided all the information on this screen is correct and you are ready to generate emails, click the **Send Contribution Statements Email** BLUE button in the top Right corner.

The **Sent** tab will show all emails sent from that batch. You can re-send an email from here if needed.

******Once one email has been sent from a batch you cannot make changes to that batch (statement footer, criteria, etc.)******