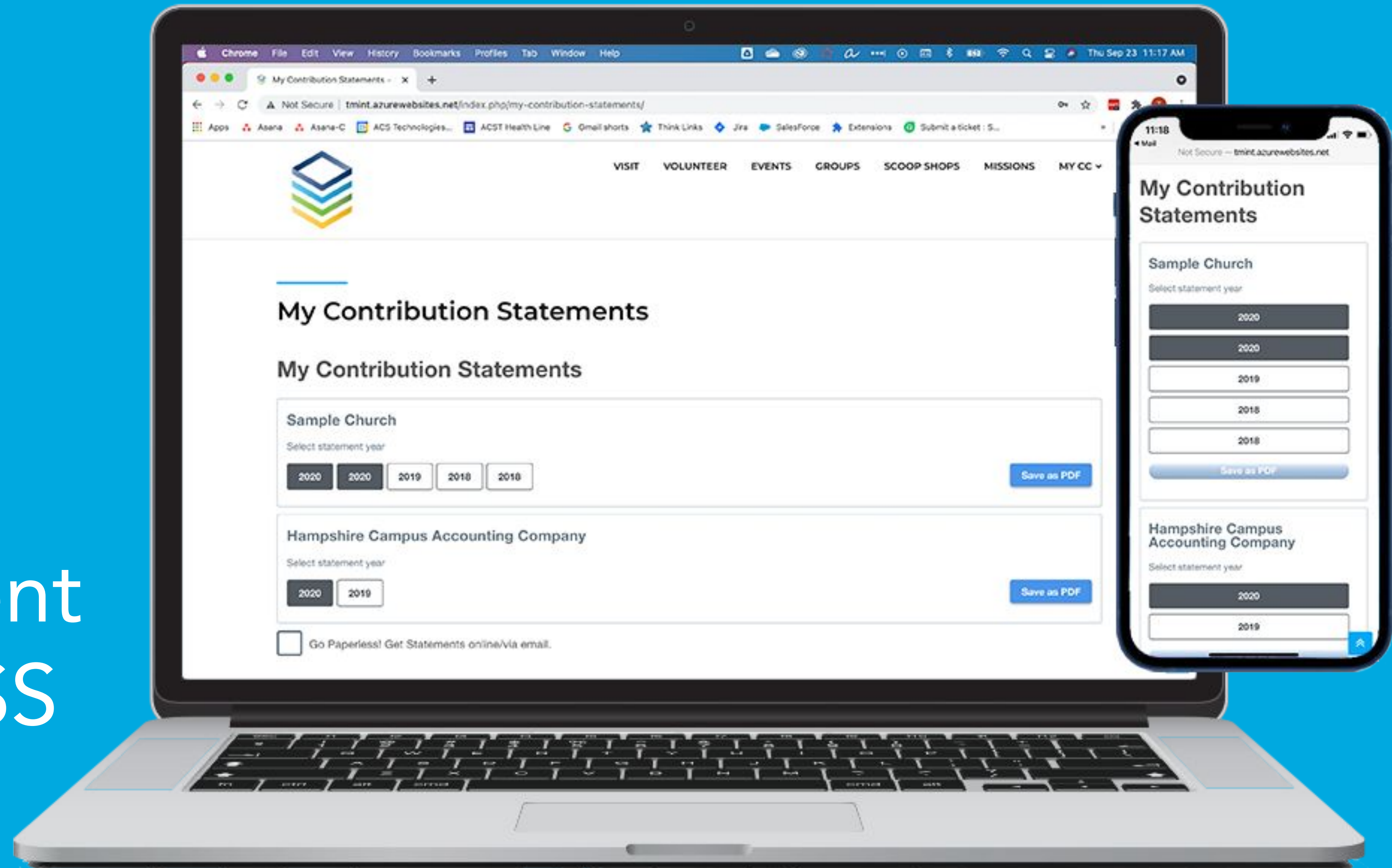


ANOTHER
"MP"
WEBINAR

MY CONTRIBUTIONS WIDGET +
STANDARD STATEMENTS =
STATEMENT SEASON SUCCESS



Donor Statement SUCCESS





Statements Plan

- Statements page
- Standard Statement Report
- Donor clean-up
- Widget

My Contribution Statements

West Bay Community Church

Select statement year

2020

Save as PDF

Sample Church

Select statement year

2020

Save as PDF

☐ Go Paperless! Get Statements online/via email.

Looking for details on recent giving? [See My Giving Page >](#)



Standard Statement

PSA - ENGAGE WITH COACHING

Free half hour of coaching to help set up your Standard Statement

Email support with answers to the Qs on the KB below to get started:

ministryplatform.com/kb/ministryplatform/stewardship/donors/donor-statements/standard-statements



Standard Statement

DRIVEN BY:

- Statements page

CONTROLLED BY:

- Accounting Company record

Accounting Company #1

stryF ● Your Church

General

GENERAL

Company Name *

Your Church

Company Contact

Your Church Record | 1.alpha@ministryplatform.com

Default Congregation

Show Online *

Yes

Online Sort Order

General Statement Settings

Statement Cutoff Date

12/31/2020 08:45 PM PT

Statement Cutoff Automation

None/Manual

Pledge Campaign

Build the Dream Capital Campaign

Alternate Pledge Campaign

2020 Guatemala Mission Trip

Donors

Donation Distribution

Donations

Batches

Deposits

Pledges

Pledge Campaigns

Donor Accounts

Batch Types

Giving Unit Summary

Statement Headers

Scheduled Donations

Statements

<input type="checkbox"/>	●	Your Church	2020	Hughes
<input type="checkbox"/>	●	Your Church	2020	Oliver
<input type="checkbox"/>	●	Your Church	2020	Garrett
<input type="checkbox"/>	●	Your Church	2020	Rogers
<input type="checkbox"/>	●	Your Church	2020	Robertson



Accounting Company

SETUP:

- Statement Cutoff Date – Must be set to a date THIS year to see statements
- Pledge Campaigns – Both will show on the Standard Statement
- Standard Statement – Should be filled in with the “Standard Statement Report”

General Statement Settings	
<u>Statement Cutoff Date</u> 12/31/2020 08:45 PM PT	<u>Statement Cutoff Automation</u> None/Manual 🔗
<u>Pledge Campaign</u> Build the Dream Capital Campaign 🔗	<u>Alternate Pledge Campaign</u> 2020 Guatemala Mission Trip 🔗
<u>List Non Cash Gifts *</u> Yes	
<u>Statement Footer</u> Other than 'intangible religious benefits', no goods or services have been received by the donor. more data more	
<u>Statement Letter</u>	

Standard Statement Settings	
<u>Standard Statement</u>	<u>Formal Salutation *</u> Yes
<u>Archive Day of Year *</u> 46	<u>Rows Per Page *</u> 26
<u>Summary Columns *</u> 4	



Accounting Company

SETUP (CONT'D):

- Archive Day of Year – Day statements will be archived
- Summary Columns – Total statement header columns
- Rows per Page – May need to be adjusted if you have a long statement footer

General Statement Settings	
<u>Statement Cutoff Date</u> 12/31/2020 08:45 PM PT	<u>Statement Cutoff Automation</u> None/Manual 🔗
<u>Pledge Campaign</u> Build the Dream Capital Campaign 🔗	<u>Alternate Pledge Campaign</u> 2020 Guatemala Mission Trip 🔗
<u>List Non Cash Gifts *</u> Yes	
<u>Statement Footer</u> Other than 'intangible religious benefits', no goods or services have been received by the donor. more data more	
<u>Statement Letter</u>	

Standard Statement Settings	
<u>Standard Statement</u>	<u>Formal Salutation *</u> Yes
<u>Archive Day of Year *</u> 46	<u>Rows Per Page *</u> 26
<u>Summary Columns *</u> 4	



Statement Record

CREATED BY ROUTINE:

- One statement per giving unit per year per Accounting Company
- Updated by Routine
 - Donations are updated
 - Households will be associated
 - Pledge Campaigns will be associated
 - Updated through the archive date
- Statements can be updated by "Unarchiving" as needed

The screenshot displays a web application interface for managing a 'Statement Record'. At the top, the title bar shows 'Statement #7900' and a breadcrumb path: 'West Bay Community Church | 2021 | Devonshire | Family'. Below this, there are three tabs: 'General' (selected), 'Donations', and 'Donors'. The 'General' tab contains several sections: 'GENERAL' with fields for 'Accounting Company' (West Bay Community Church), 'Statement Year' (2021), 'Household' (Devonshire), and 'Stmt Type' (Family); 'Salutation Information' with 'Contact Record' (Devonshire, Daisy | laura@ministryplatform.com) and 'Spouse Record'; 'Salutation' (Daisy Devonshire); and 'Archival Information' with 'Archived' (No), 'Archived Campaign', 'Alternate Archived Campaign', and 'Last Change By Routine' (9/13/2021 03:19 PM ET). On the right side, there is a sidebar with 'Tasks' and 'Files' sections. The 'Files' section shows an 'Attach File' button and a file named '2021-Devonshire-...' with edit and delete icons. Below the files is an 'Audit Log' section.




Statement Record Info

- Important for Historical Accuracy
- See Donations and Donors associated with the Statement
- Required for the Widget to display the Statements
- The Statement Service will attach a PDF to the Statement Record (Webhook)
- This IS the SAME PDF that will display in the Widget
- Use this page for EASY and QUICK access to contribution statements

ministryplatform.com/kb/ministryplatform/stewardship/donors/donor-statements/standard-statements/standard-statement-generator



Statement Record



Statement #7900

● West Bay Community Church | 2021 | Devonshire | Family

Accounting Comp

West Bay Commu

Household *

Devonshire

Contact Record

Devonshire, Daisy

Salutation

Daisy Devonshire

Archived *

No

Alternate Archived Campaign

Statement #7900

● West Bay Community Church | 2021 | Devonshire | Family

General

Donations

Donors

in:

All Records

Devonshire, Daisy | Credit Card | 2/13/2021

Statement #7900

● West Bay Community Church | 2021 | Devonshire | Family

General

Donations

Donors

in:

All Records

Devonshire, Daisy | 2021 | West Bay Community Church

None

None

2021

Family

Head of Household

Last Change By Routine *

9/13/2021 03:19 PM ET



Standard Statement Report

- Simplified!
- Easy to use
- Control what prints
- Select multiple YEARS at a time!
- Print in sections
- Print # of pages per download

Accounting Company

West Bay Community Church

Stmt Yr

☒ NULL

View Report

Gave At Least

0

Sort Order

Postal

Pages

All Statements

Group/Segment

All Segments

Show

Logo

1 of 1

Find | Next

Contribution Statement

Daisy Devonshire

O'Sullivan's Dream Team Abroad	\$500.00
Given	\$75.00
Remaining	\$425.00

2021 donations through 12/31/2021 are included below.

Date	Type	Tithe/Offering	Missions	Other Description	Total
2/5/2021	Credit Card		\$50.00	O'Sullivan's Dream Team Abroad	\$50.00
2/13/2021	Credit Card		\$25.00	O'Sullivan's Dream Team Abroad	\$25.00
Totals		\$0.00	\$75.00	\$0.00	\$75.00

Add a Statement Footer to the accounting company record

Bayside | 502 Melody Lane, Verona, WI 53593 | 608-216-6173



Statement Widget

- Simple Widget
- Add to your website
 - Create its own page with appropriate other info
 - How donations are impacting others
 - How to adjust giving
 - Who to contact for questions
- Allow donors to download last four years

My Contribution Statements

West Bay Community Church
Select statement year
2020
Save as PDF

Sample Church
Select statement year
2020
Save as PDF

☐ Go Paperless! Get Statements online/via email.
Looking for details on recent giving? [See My Giving Page >](#)



Statement Season Prep

- Clean the data!
 - Fix Views
 - Combine Contacts
- Spot check!
- Create (or review) Views to segment by Stmt Method
 - Paper/Mail
 - Email/Online

Pro Tip: Leverage the Statements page!

The screenshot displays the MinistryPlatform interface. On the left is a sidebar with navigation options: Home, Contacts, Households, Participants, Groups, Events, Milestones, Sacraments, Opportunities, Procedures, Group Files, Faith Formation, People Lists, Church Structure, Needs Management, Facilities, Communications, Custom Forms, Mission Trips, and Stewardship. Under Stewardship, 'Donors' is selected. The main area shows a list of donors with columns for name, email, and status. A dropdown menu is open over the 'Donors' list, showing a search bar and a list of options including 'Env File-No Address', 'Env File-No Giving 18 mo', 'Env File-On List', 'Env File-Will Be Included', 'First Contact Needed', 'First Gift Last Month', 'First Gift This Month', 'Gave Last Yr: Deductible', 'Gave This Yr: Deductible', 'Giving This Year', 'Giving This Year: NonCash', 'Major Donors Past 2 Weeks', 'Non Cash Donors', 'Not Yet Participants', 'Online Recurring Donors', 'Soft Credit Last Year', 'Soft Credit This Year', 'Stmt: Address Issue', 'Stmt: Fix Method', 'Stmt: Fix Type' (highlighted), 'Stmt: Review Deceased', and 'Stmt: Set to Individual'. To the right of the dropdown, there are two charts: 'Donors by Donation Frequency' and 'Donors by Donation Level (C)'. The bottom of the screen shows a status bar with '6 Results'.



Statement Season Prep

- Request "Letter" verbiage
- Confirm Widget URL
 - Reminder: Not the snippet!
- Create Template
 - Include (or link to) "letter"
 - Include Name tokens
 - Consider Text strategy
- Format paper letter

Pro Tip: Print and fold letter ahead of time!

Template Editor

Template: Name: *

Subject: *



Hello [Nickname]!

[Close](#) [Save](#) [Save As New](#)

Content
Blocks
Body
Uploads



Sending Statements!

- Using Views + Templates send email/online Statements via New Message Tool
- Using Views + Standard Statement Report print paper/mail Statements
- Fold, stuff, postage, etc.

Pro Tip: Promote paperless option NOW!

The screenshot shows a web-based 'New Message' interface. At the top, there are tabs for 'Email' (selected) and 'Text'. Below this is a 'Contacts' dropdown menu and a search bar. The 'Recipients' field is set to 'Selected Contacts', and there is a checkbox for 'Send to Parents'. The main message body contains a pre-written template for a contribution statement. It starts with a placeholder for a photo, followed by a personalized greeting 'Hello [Nickname]!'. The text explains that it's time to send out contribution statements and expresses appreciation for the user's partnership. A placeholder '{INSERT MY CONTRIBUTION LINK HERE}' is provided for a link. Below this, it instructs the user to click the link to retrieve their statement and provides contact information for the Finance Office: finance@widgetchurch.com or 555.555.5555. The message ends with 'Looking forward to another year of serving our community with you.' and 'Your WidgetChurch Staff'. At the bottom of the message body is a dark blue footer bar with the WidgetChurch logo. The interface also includes a rich text editor toolbar with options for bold, italic, underline, link, unlink, insert image, and code. At the very bottom, there are tabs for 'Message', 'Files', and 'Advanced', and a 'Send' button with a counter '0' and a 'Close' button.

ANOTHER
"MP"
WEBINAR

THANKS FOR JOINING US!