Church360° Members

Reports

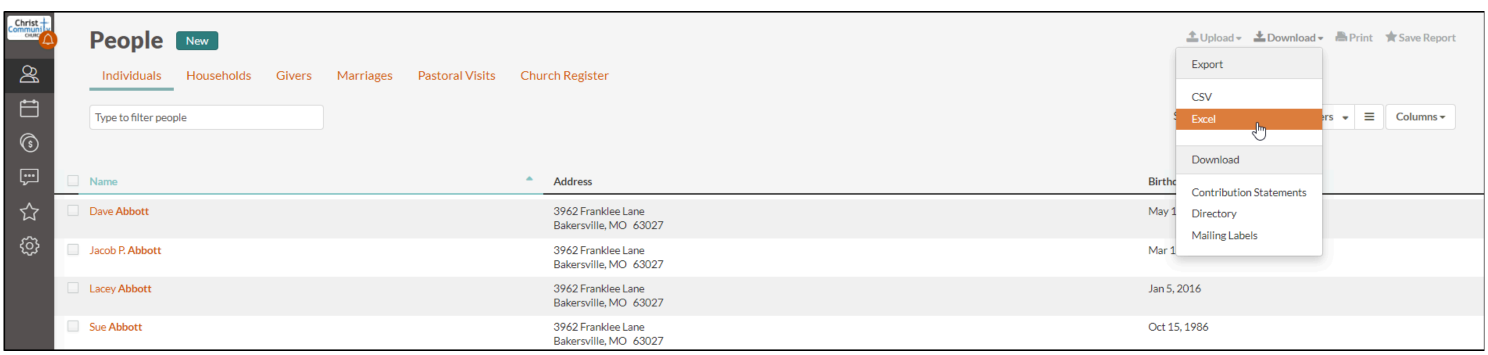
Exporting Person Lists to CSV or Excel

In Church360° Members, you can export most of your views and reports to a CSV or Excel file for easier reporting or further calculations. The default People view, in particular, can be used to download address, membership, or contact information directly to a spreadsheet format rather than from a directory.

If your report lists five or fewer columns, you can also print directly from your browser.

To export a list of people and their information,

1. Go to the People view and choose your preferred mode.
2. Filter your view as you need using the search bar, Smart Groups, or Smart Group traits.
3. Select the columns you wish to appear in your file by clicking on the "Columns" drop-down menu and checking the box for each field.
4. Click the "Download" link near the top of the view and select your preferred file type. Depending on the web browser, you may be asked if you would like to save the file to your computer. Otherwise, the download will begin automatically.
5. Once the file is downloaded to your Downloads folder, you can click on it to open it. Some browsers may have additional prompts.

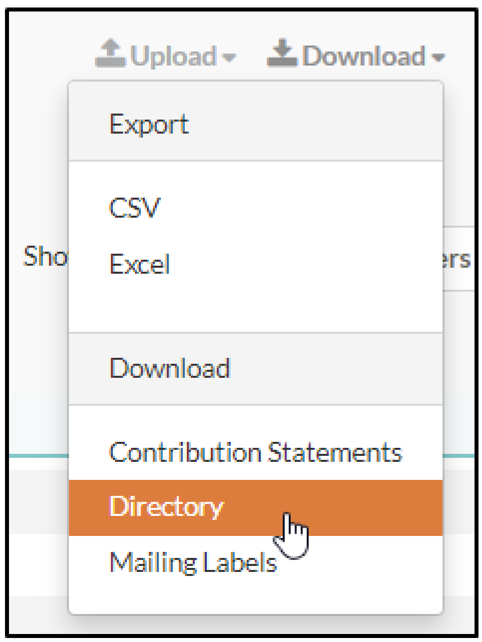


Exporting a Church Directory

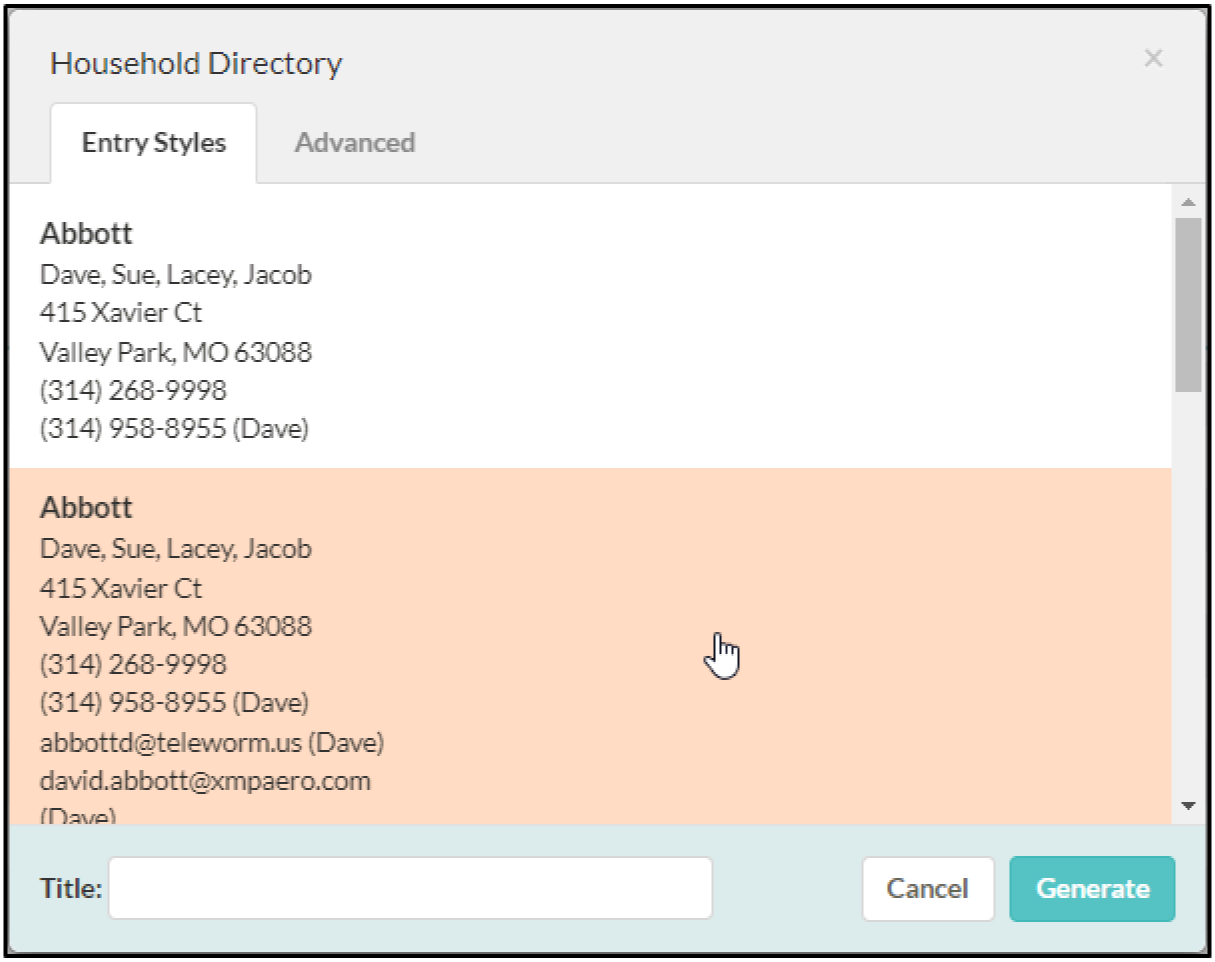
A common report users may want to export is an individual or household directory. For those who have also added images to either individual or household profiles, a pictorial directory can be exported as well.

To generate a directory,

1. Go to the People view and select either the Individuals or Households mode. The mode you choose will determine the type of directory you'll generate.
2. Select those you want to include in the directory, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If checkboxes are marked, all visible records will be downloaded.
3. Click the "Download" button at the top right of the screen and select "Directory".



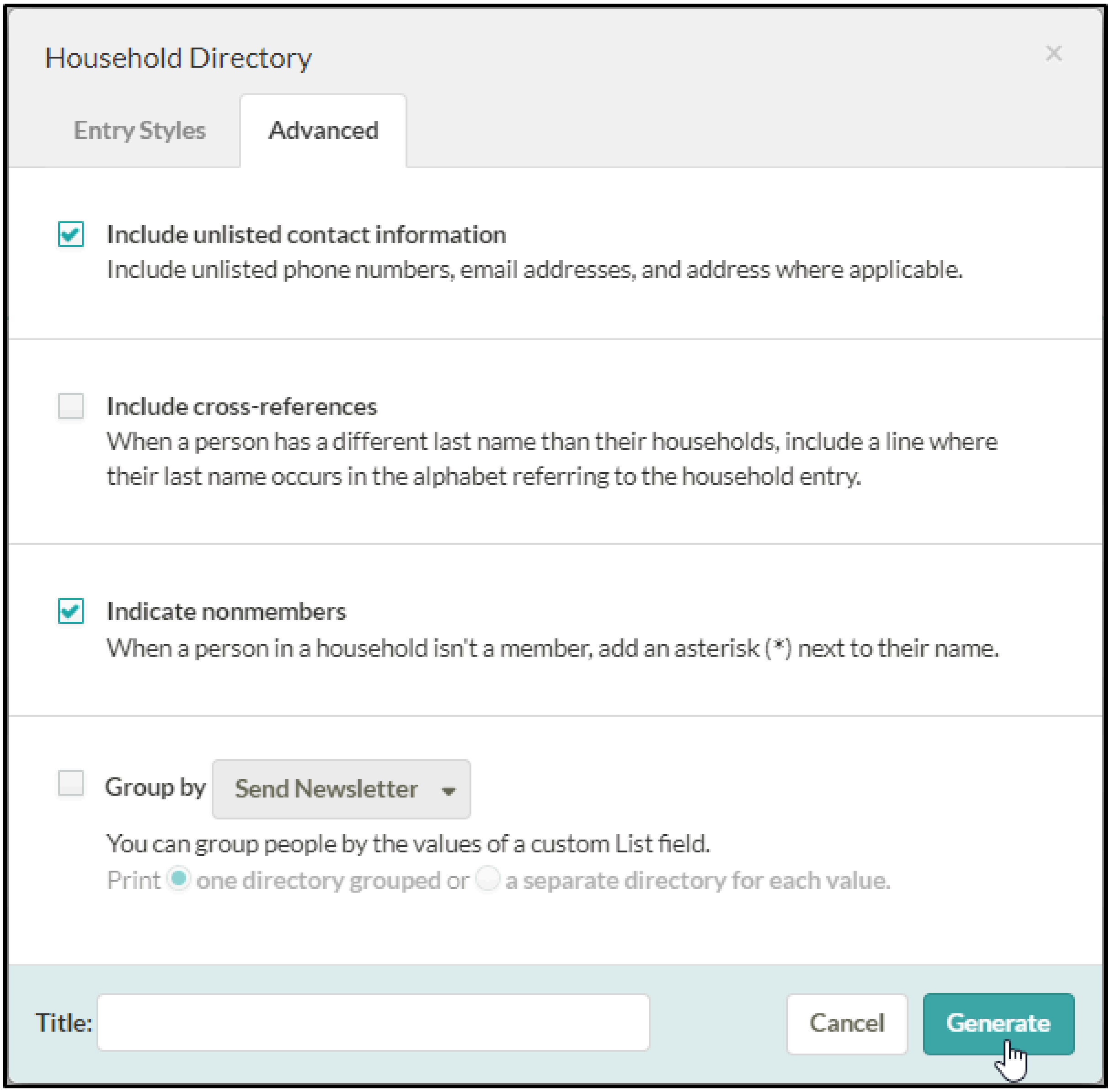
4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the Entry Styles tab, scroll through the samples and choose how you'd like a directory entry to look.



5. If this is the first time generating a directory, it's recommended that you take a look at the Advanced tab before clicking the "Generate" button. Under the Advanced tab, your choices will vary depending on which mode you are generating from.

- If you are using the Individuals view, check if you want to include unlisted contact information. You can also choose to group your people according to a custom Person field, if available.
- If you are using the Households view, check if you want to include unlisted contact information, cross-references (for those with surnames differing from their household name), or if you'd like non-members to be shown with an asterisk. You can also choose to group your people according to a custom Household field, if available.

6. If all of your settings are the way you prefer, you can add a title and click "Generate". This will prepare a Word document of your directory. This process may take a few minutes, depending on the number of people selected.



7. Once the button changes to "Download", you can click on it to download the Docx file. Click on the file in your Downloads folder to open it up for editing or printing.

Exporting Individual Mailing Labels

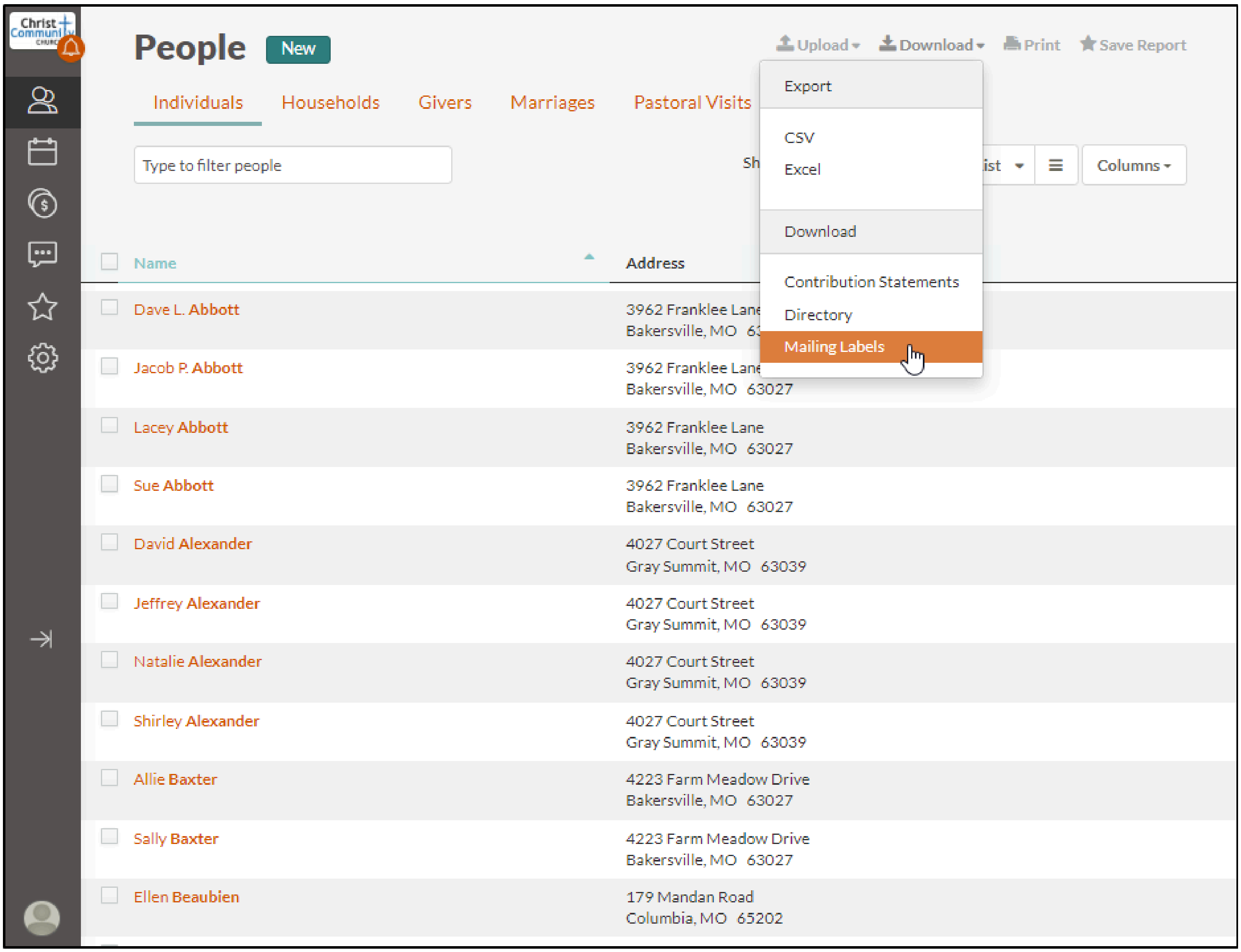
For some tasks, you'll want to export mailing labels for specific people, instead of an entire household.

To generate mailing labels for individuals,

1. Go to the People view in the Individuals mode.

2. Choose who you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.

3. Click the "Download" button at the top right of the screen and select "Mailing Labels".

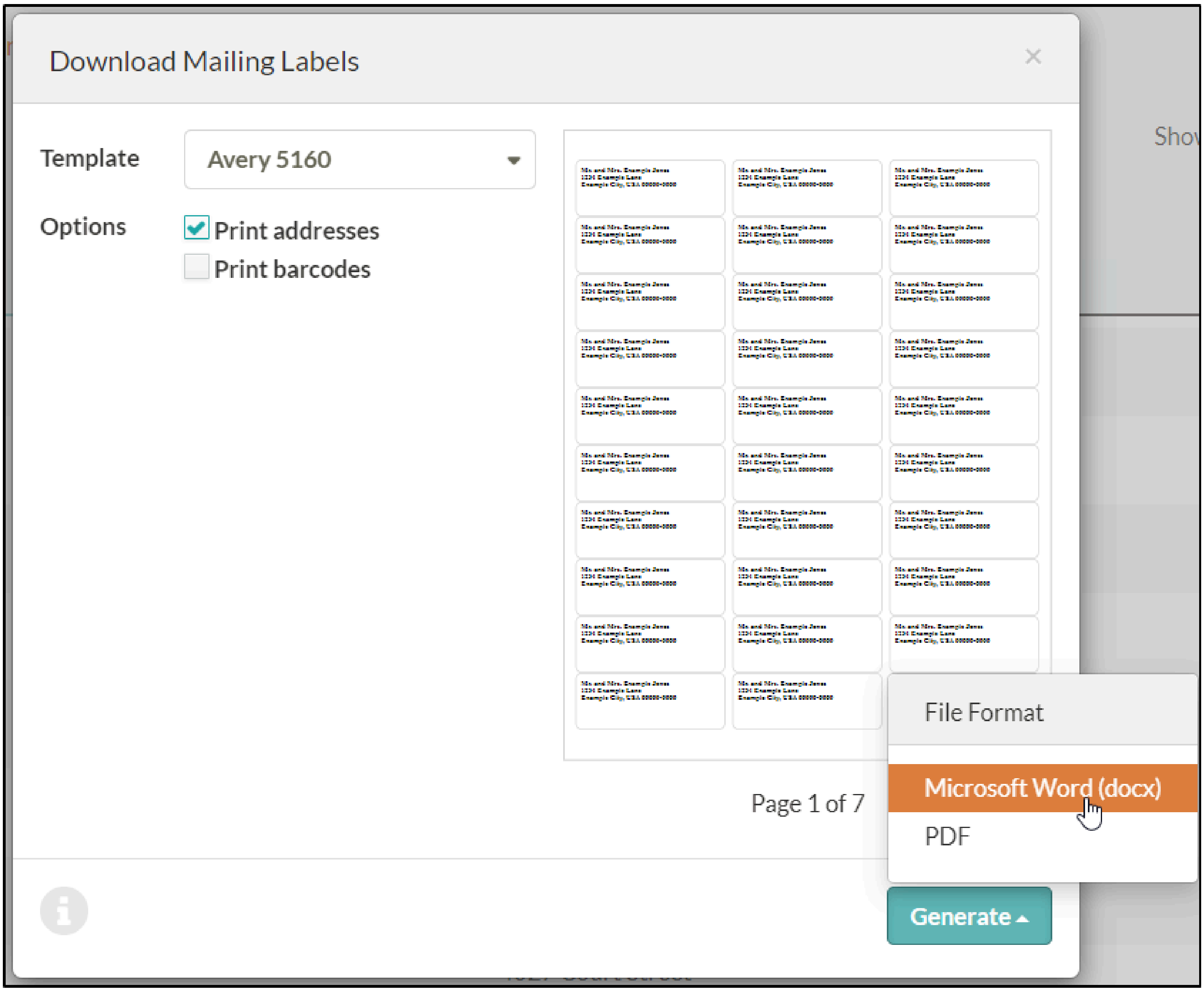


4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of people selected.

7. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.

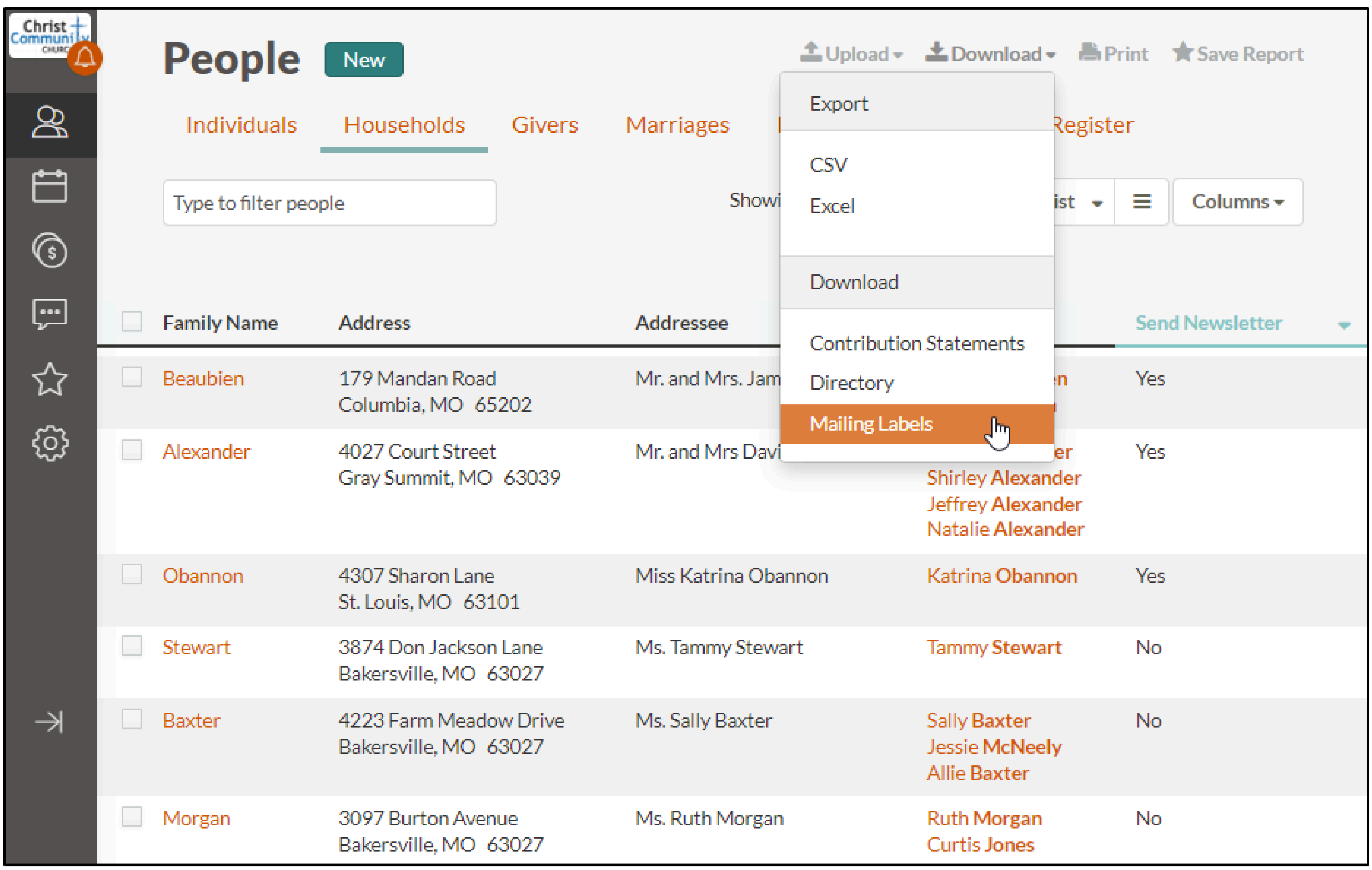


Exporting Household Mailing Labels

If you are looking to print one mailing label per household, it's recommended to generate by household, instead of for individuals. These labels will use the Addressee field of the household record for labels.

To generate mailing labels for households,

1. Go to the People view in the Households mode.
2. Choose the households you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. Households will be included if at least one member fulfills your set criteria.
3. Click the "Download" button at the top right of the screen and select "Mailing Labels".

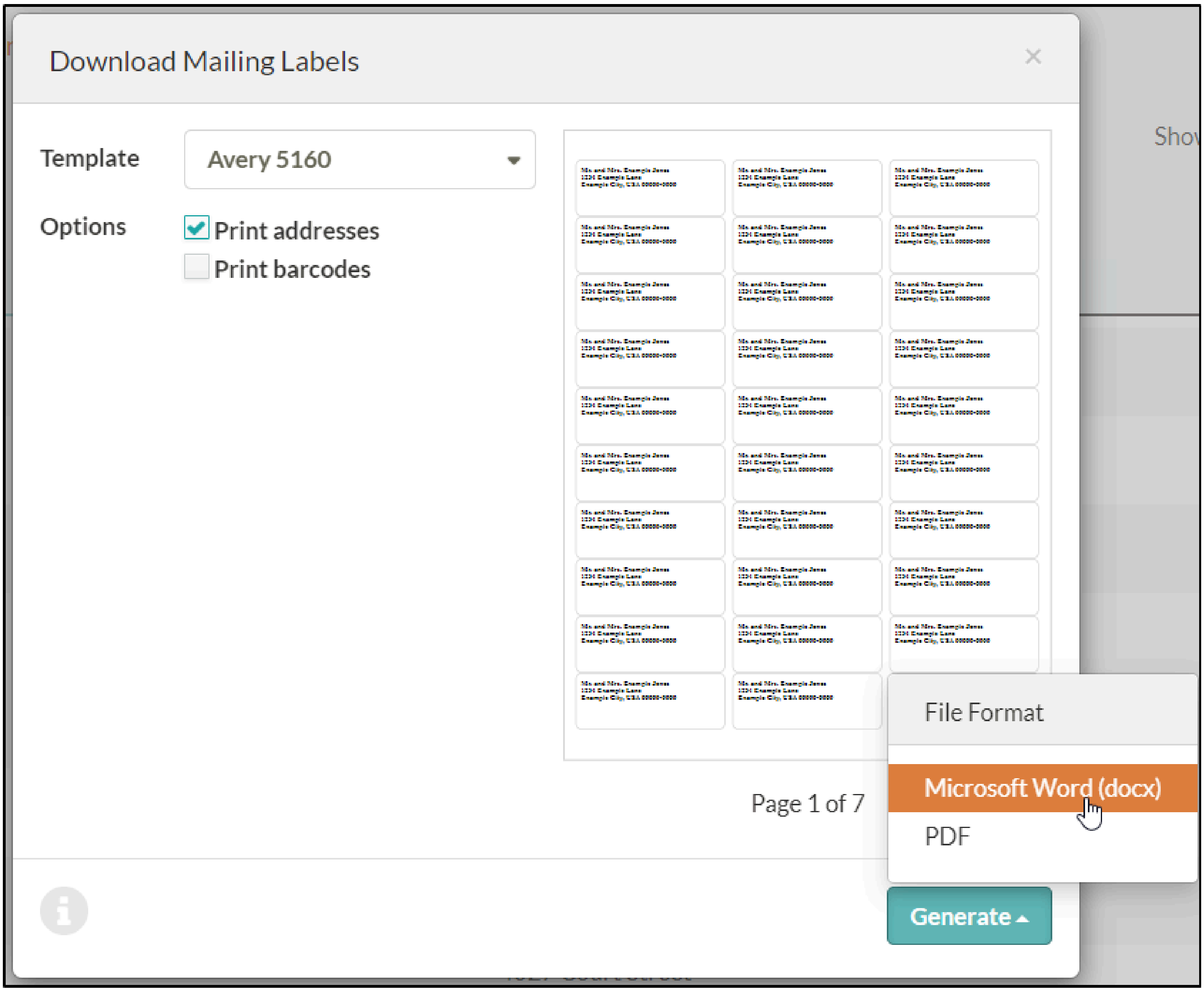


4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of households selected.

7. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.

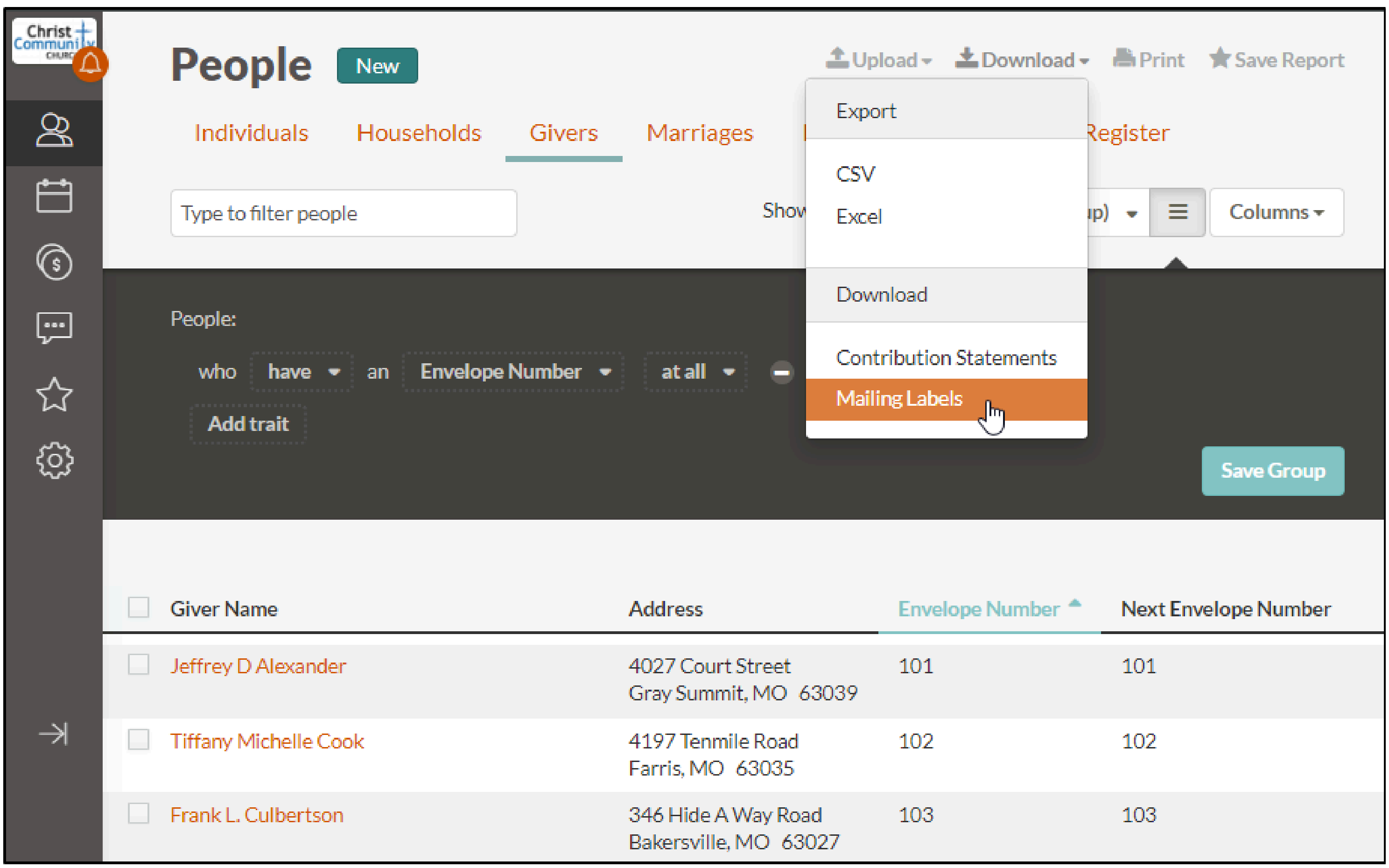


Exporting Envelope Labels

If you are looking to print envelope labels, you can do so from the Givers mode of the People view. These labels will use the Giver Name field.

To generate labels for envelopes,

1. Go to the Givers mode in the People view.
2. Choose the givers you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If using envelope numbers, you may want to filter only those with an Envelope number or a Next Envelope Number (if you've scheduled an envelope renumbering).
3. Click the "Download" button at the top right of the screen and select "Mailing Labels".



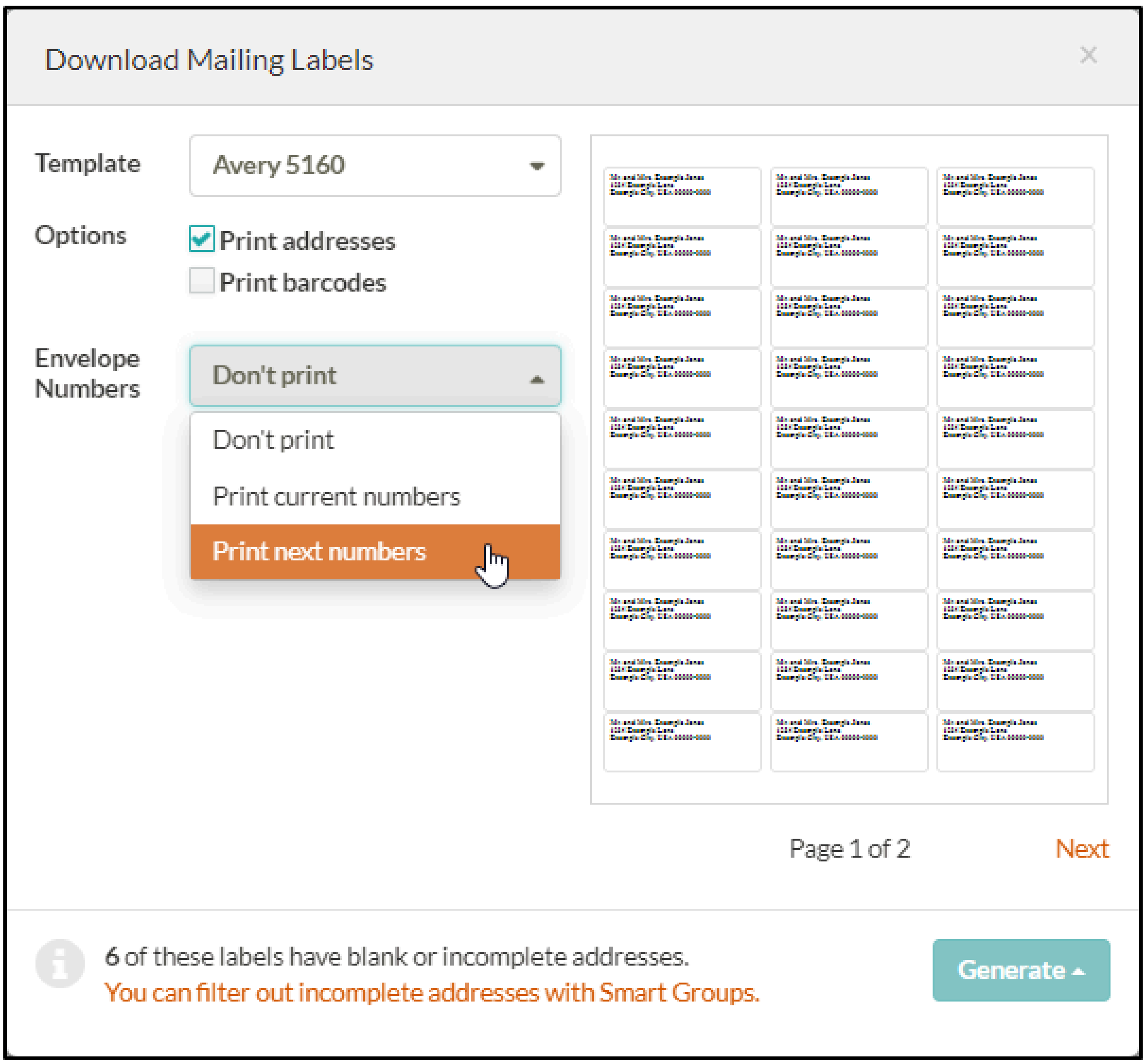
4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. To add envelope numbers to your labels, use the drop-down to choose to not print, print current numbers, or print next numbers (if a renumbering has been scheduled).

7. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of households selected.

8. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.

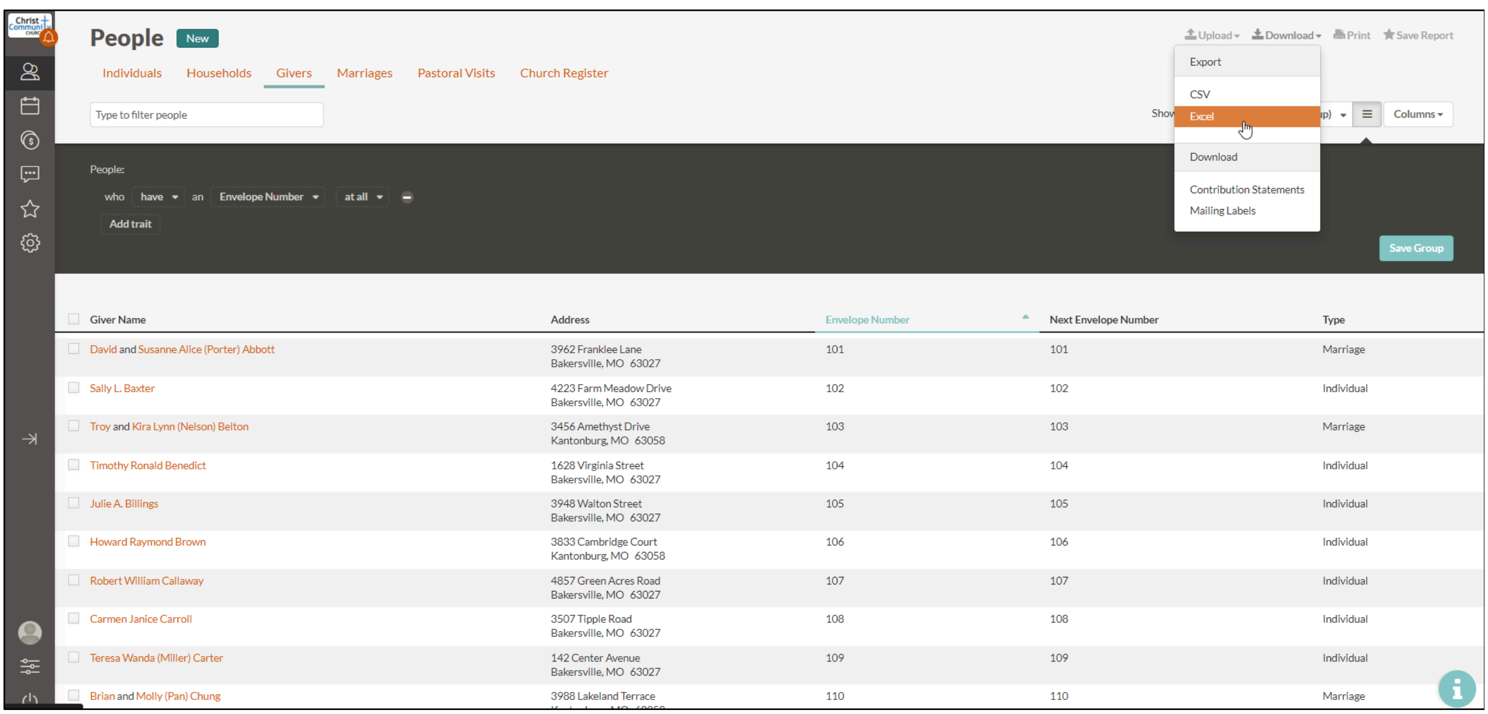


Exporting an Envelope List

Before or after scheduling a renumbering, you may want to generate a list of the current or upcoming envelope numbers for your congregation.

To export an envelope list,

1. Go to the People view in the Givers mode.
2. Choose the givers you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If using envelope numbers, you may want to filter only those with an Envelope number or a Next Envelope Number.
3. Use the Columns drop-down menu to the far right of the screen to choose the columns you want to include in your list.
4. Once your columns look appropriate, you can click "Download" to export your current view as a CSV or Excel file or click "Print" to print directly from your browser. Depending on the number of rows chosen, printing from the browser may cause some columns to be cut off.



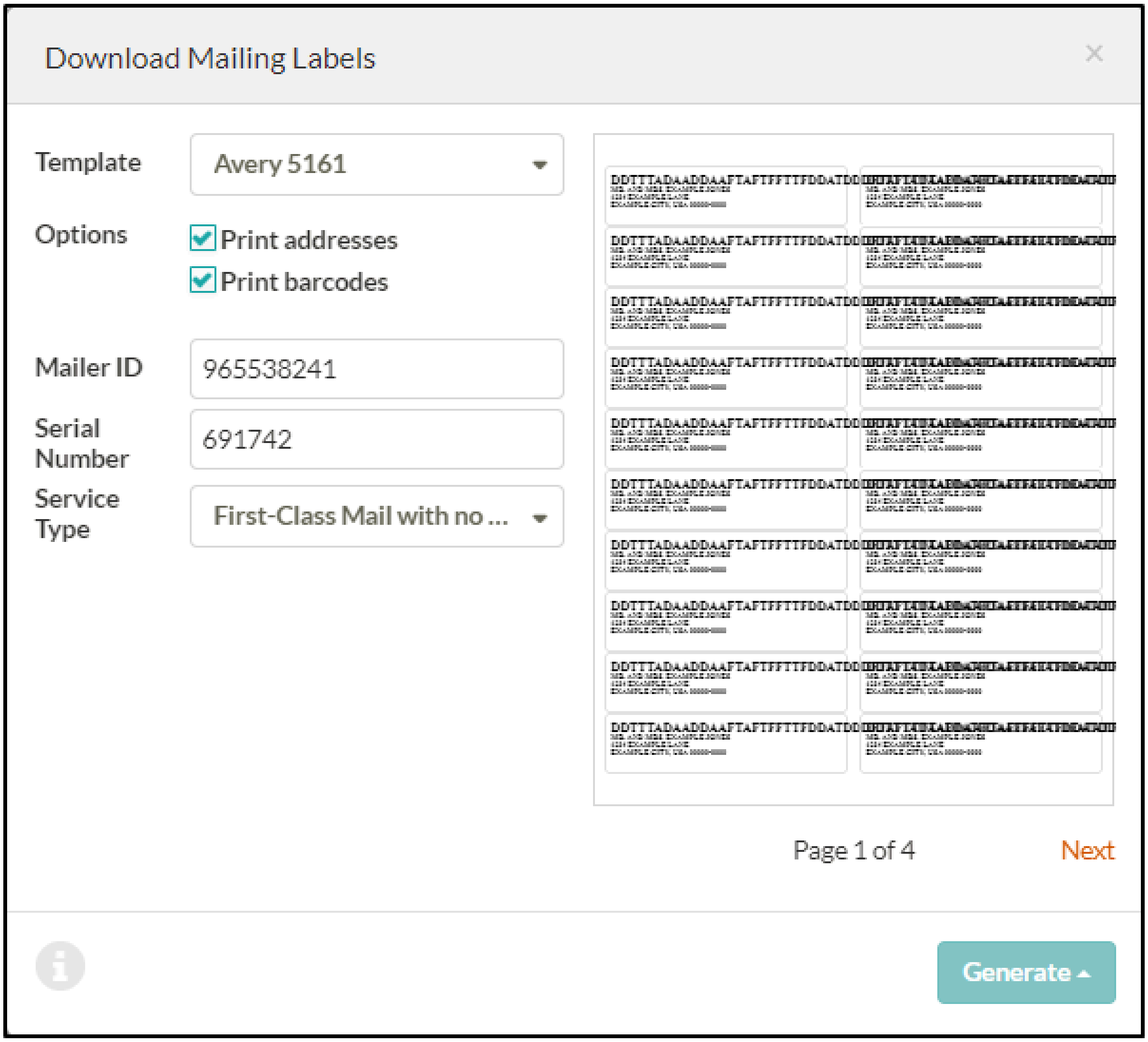
Using Barcodes on Mailing Labels

If you are sending a bulk mailing, you may wish to add a barcode on each of your labels.

To utilize this feature, you'll first need to contact your local post office for a Mailer ID, Serial Number, and Service type for USPS Intelligent Mail barcodes. For more information on IMb, please visit the Postal Pro website here.

To generate mailing labels with barcodes,

1. Once you've filtered or selected people to generate labels for, click the "Download" button and select the "Mailing Labels" option.
2. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu. It's important to note that some label templates do not support IMb.
3. Use the checkboxes to choose to include barcodes.
4. In the fields that appear, enter the Mailer ID and Serial Number provided to you by your post office. Use the drop-down menu to choose the Service Type for your barcodes.
5. Next to the “Generate” button, you may see a message prompting you to install the USPS Intelligent Mail barcode font. Click on the hyperlink and the file will automatically begin downloading in your browser.
6. In your Downloads folder, click the file to open it and begin installing the font.
7. Within the file, click on the “Install” button and follow the instructions as prompted. You will only need to install the font on your computer one time and it will apply to any subsequent mailing label exports. If you are not a system administrator, you may need special permission to download and run this font.
8. Once your settings are set and fonts installed, you can now click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of people selected.
9. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.


Download Mailing Labels
Template
Avery 5161
Options
Print addresses
Print barcodes
Mailer ID
965538241
Serial Number
691742
Service Type
First-Class Mail with no ...
Page 1 of 4
Next
Generate

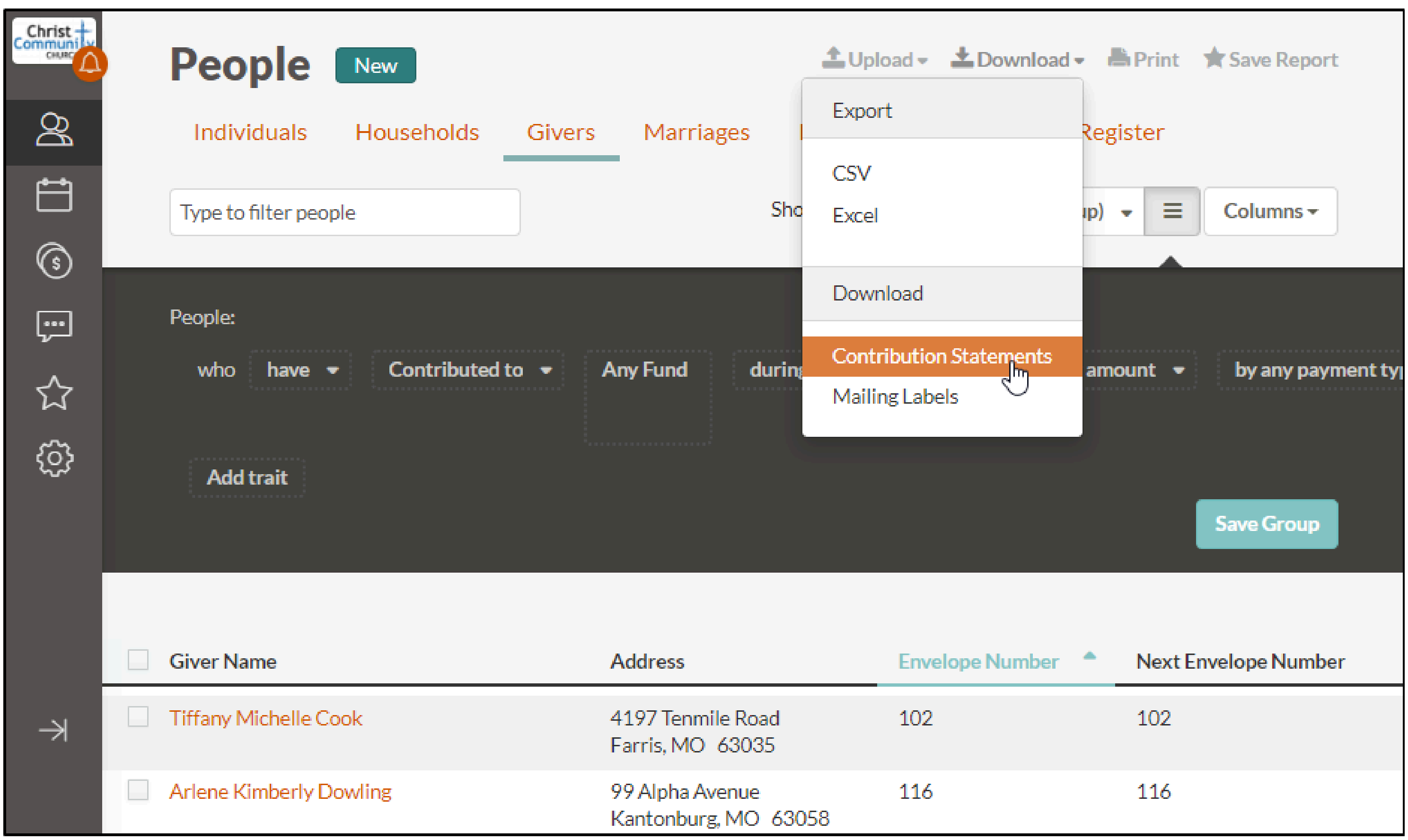
Exporting Contribution Statements to PDF

If you are looking to print a statement of offerings for any period of time in bulk, you can select the person records you want from the People view and export that information into a PDF that you can then print.

This hard copy can then be given to your congregants as a record of their charitable giving for tax deductions.

To generate a PDF statement,

1. Go to the People view in your preferred mode.
2. Choose who you are looking to print statements for, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.
3. Click the "Download" button at the top right of the screen and select "Contribution Statements".

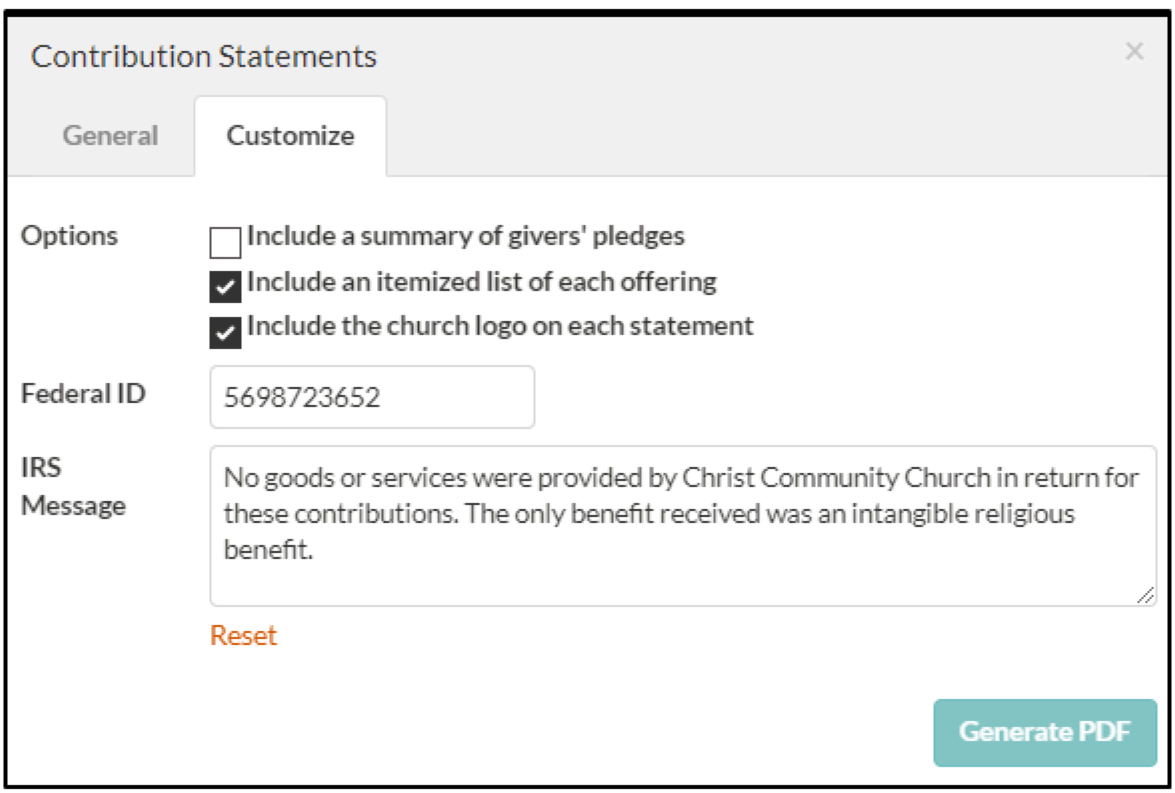


4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the General tab, select the date range for your statements. Two shortcut links below

the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

5. Check the box if you want to generate statements for those in your selection that did not give during the date range.

6. If this is the first time generating your statements, it's recommended that you take a look at the Customize tab before clicking the "Review and Email" button. Under the Customize tab, check whether you want to include a summary of the giver's pledges and/or an itemized list for each offering. Here, you can also add a Federal ID and an IRS message to add to each statement.



7. If all of your settings are the way you prefer, click "Generate PDF". This will prepare a PDF of all selected givers and their contribution statements. This process may take a few minutes, depending on the number of people selected.

8. Once the button changes to "Download", you can click on it to open the PDF. In the top right corner of the PDF viewer, you can click the down arrow icon to download the PDF to your computer or the printer icon to print directly from your browser.

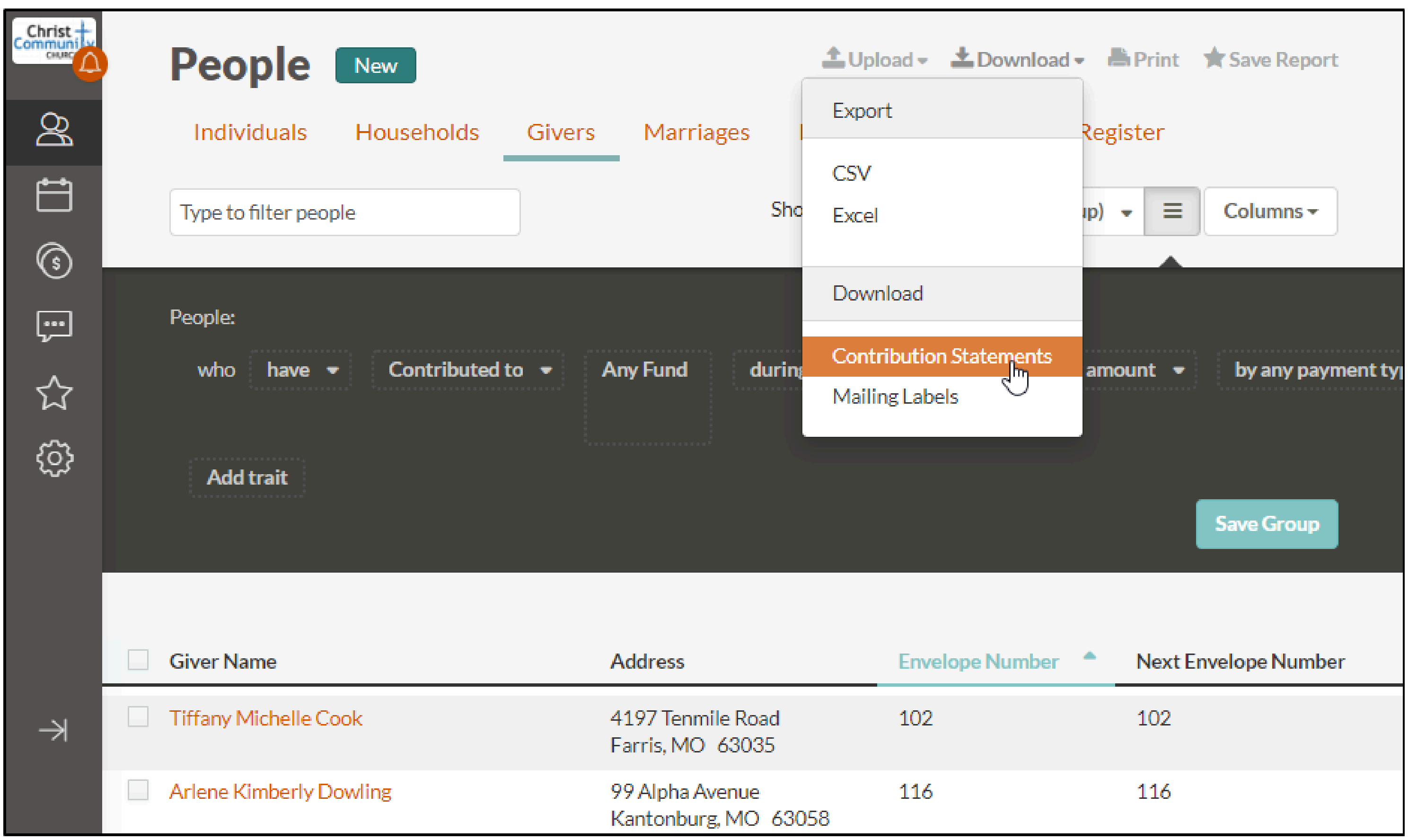
Emailing Contribution Statements

If you have a giver's email address and they don't want to paper copy of their statement, you can email their statement directly from your People view using the default email settings on your computer and internet browser.

For more information on setting up your email client to use the Church360° relay, please visit our article on the subject.

To email a PDF statement,

1. Go to the People view in your preferred mode.
2. Choose who you are looking to print statements for, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.
3. Click the "Download" button at the top right of the screen and select "Contribution Statements".

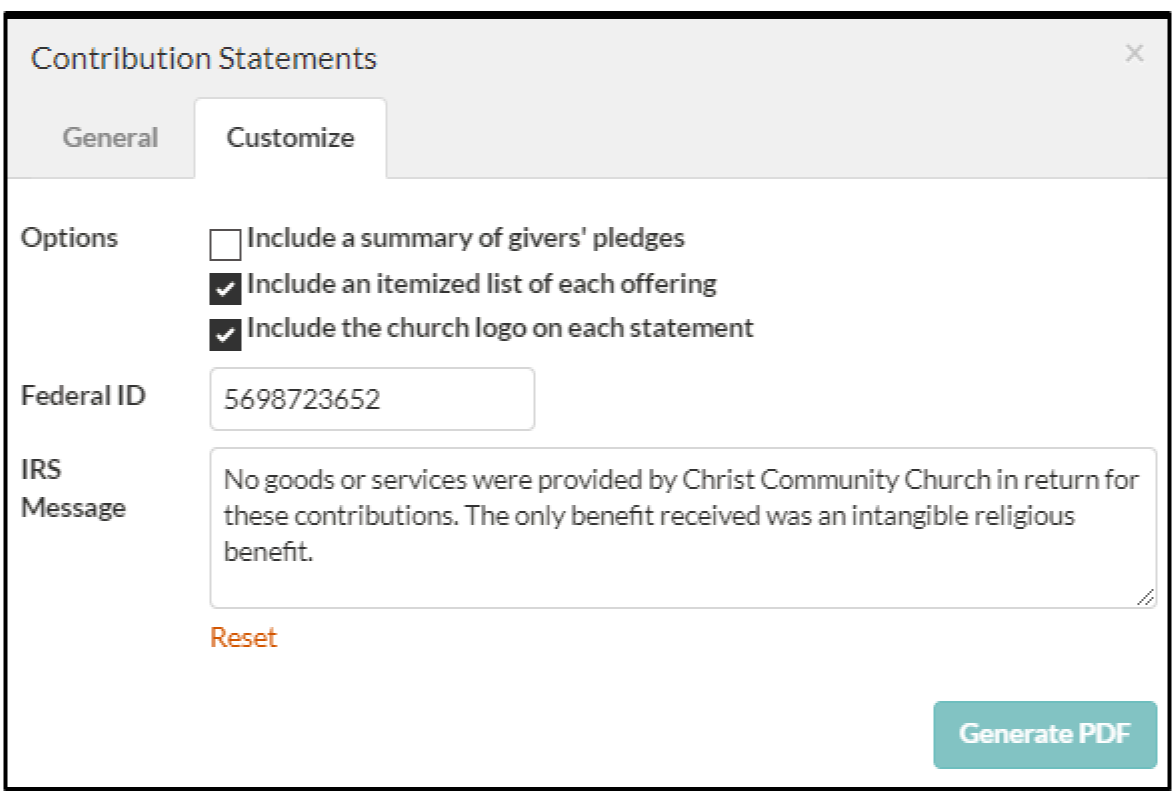


4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the General tab, select the date range for your statements. Two shortcut links below

the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

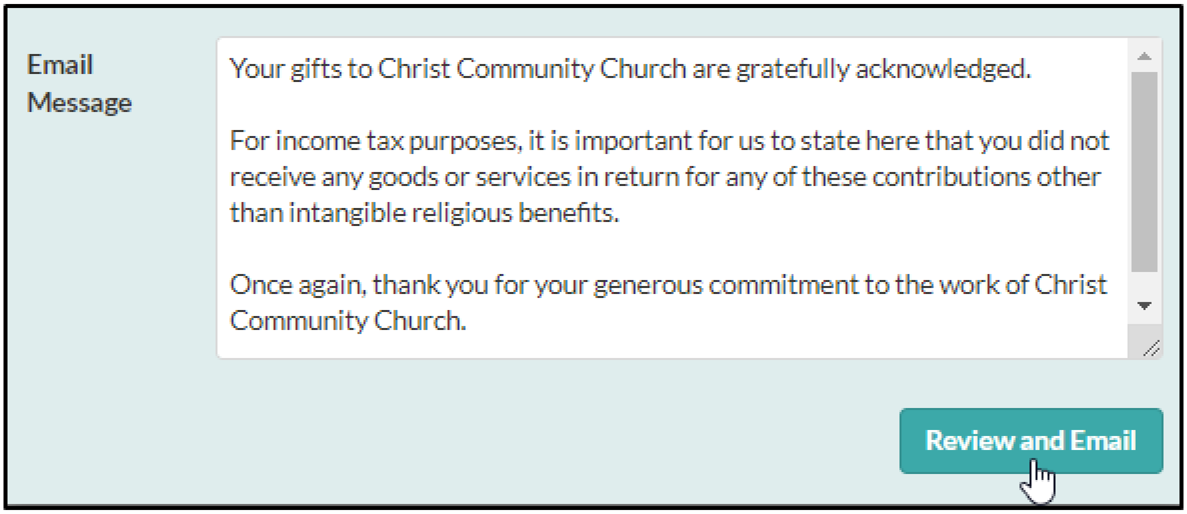
5. Check the box if you want to generate statements for those in your selection that did not give during the date range.

6. If this is the first time generating your statements, it's recommended that you take a look at the Customize tab before clicking the "Review and Email" button. Under the Customize tab, check whether you want to include a summary of the giver's pledges and/or an itemized list for each offering. Here, you can also add a Federal ID and an IRS message to add to each statement.



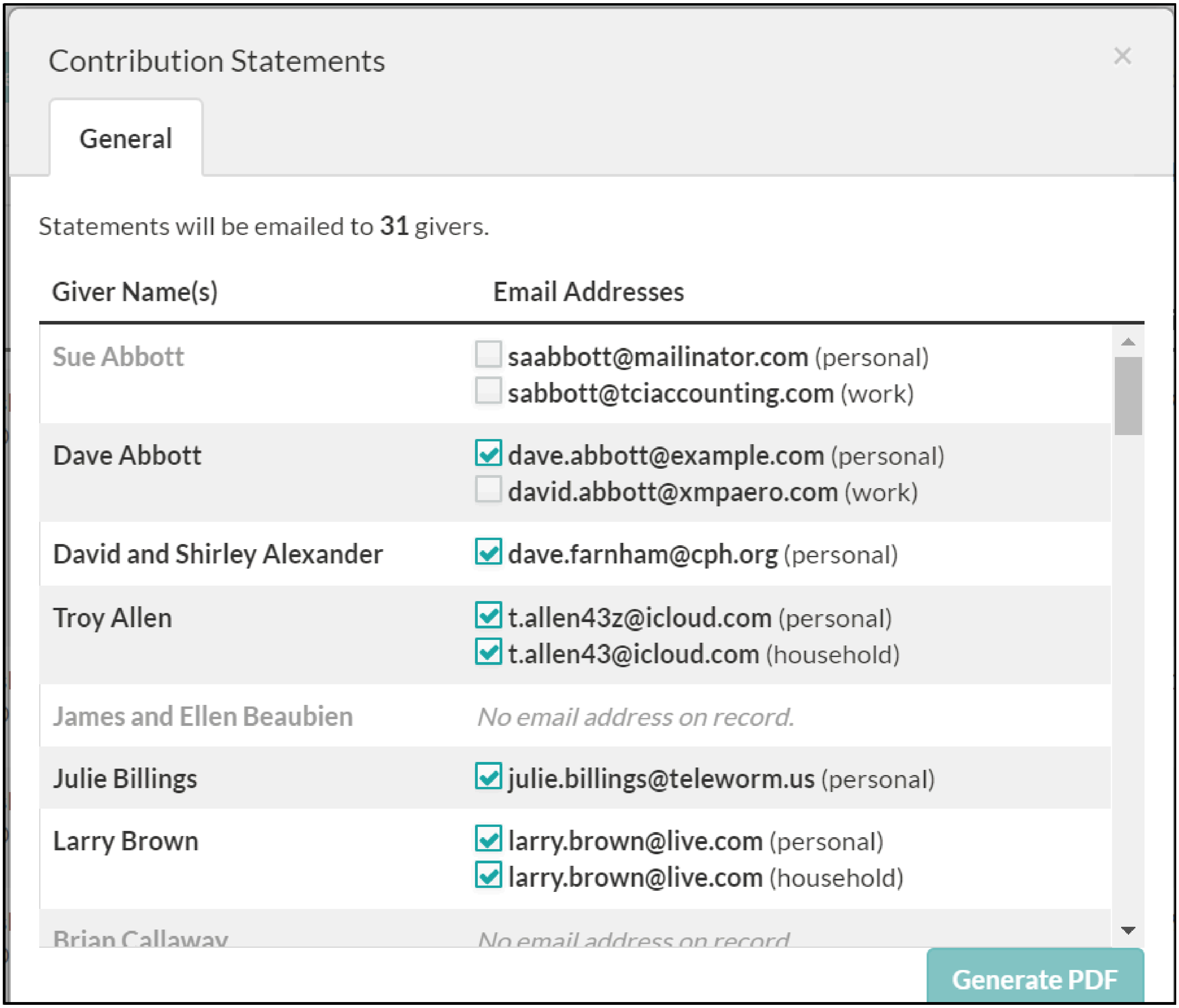
7. In the lower section of the window, you can type an email message to be sent with each statement.

8. If all of your settings are the way you prefer, click "Review and Email". You do not have to click the "Generate PDF" if you are not planning on downloading or printing these statements.



9. When choosing to email statements, you'll be shown a window with all available email addresses for those in your selection. You can check which addresses you would like to receive their respective statements. The addresses you checked will be saved and selected for the next time you send an email.

10. Click "Send" to send those contribution statements to those emails. A notification will appear under the bell icon in the upper right corner of your screen.

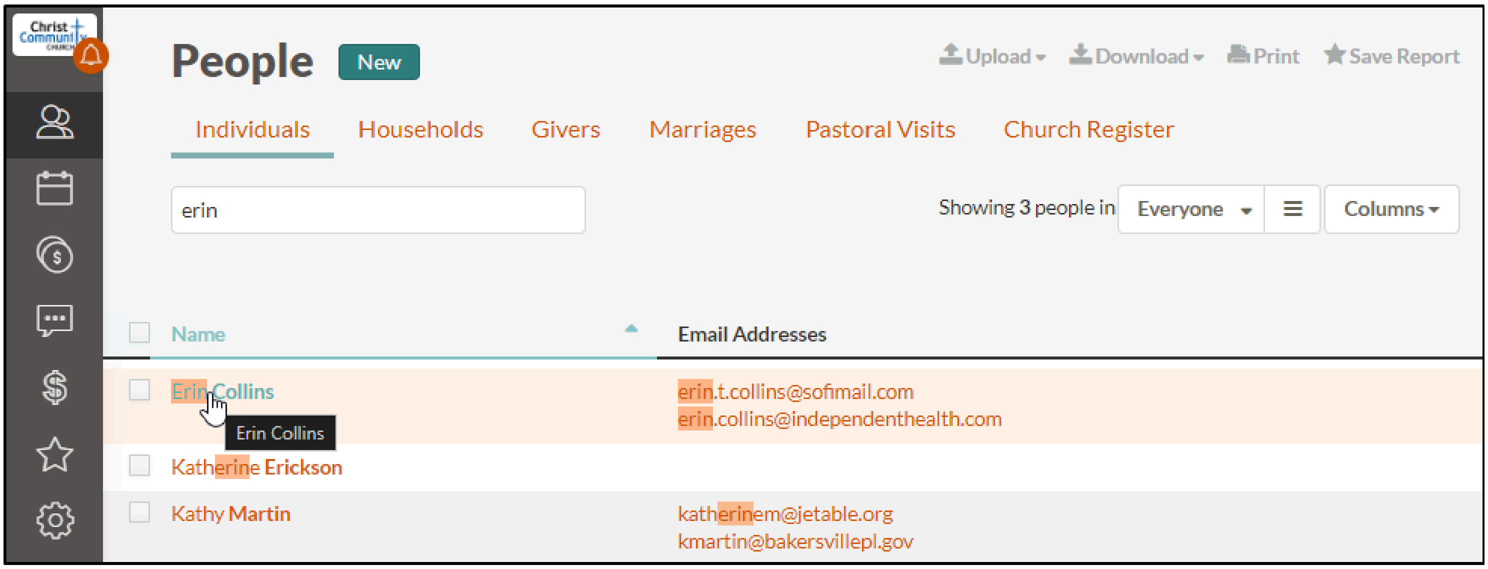

Contribution Statements
×
General
Statements will be emailed to 31 givers.
Giver Name(s)
Email Addresses
Sue Abbott
saabbott@mailinator.com (personal)
sabbott@tciaccounting.com (work)
Dave Abbott
dave.abbott@example.com (personal)
david.abbott@xmpaero.com (work)
David and Shirley Alexander
dave.farnham@cph.org (personal)
Troy Allen
t.allen43z@icloud.com (personal)
t.allen43@icloud.com (household)
James and Ellen Beaubien
No email address on record.
Julie Billings
julie.billings@teleworm.us (personal)
Larry Brown
larry.brown@live.com (personal)
larry.brown@live.com (household)
Brian Callaway
No email address on record.
Generate PDF

Printing an Individual's Contribution Statement from their Profile

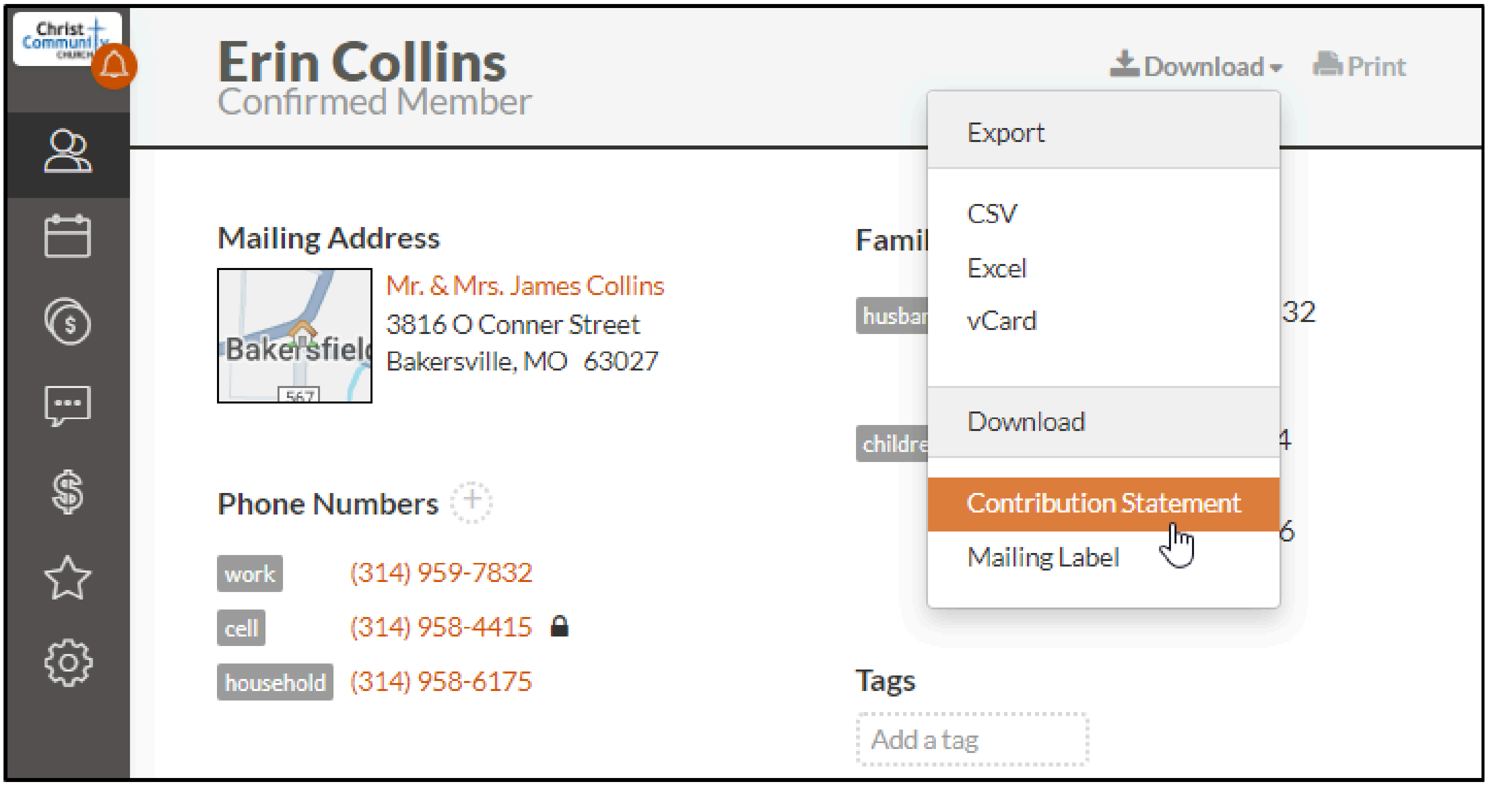
If a single person wants their contribution statement, users can print one from the person’s profile.

To print a contribution statement for a single person,

1. Go to the People view and click on either the individual or household name to open the profile.



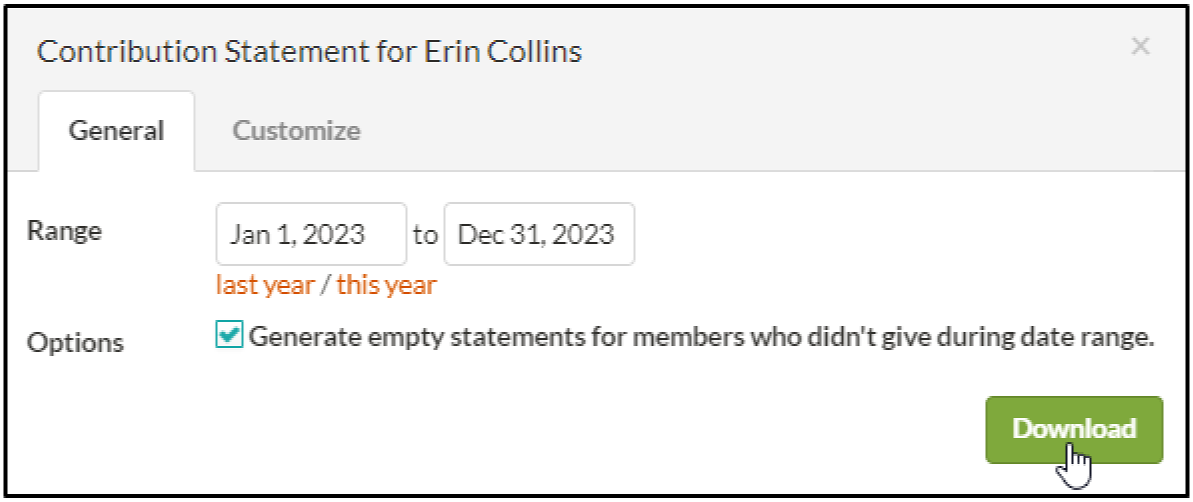
2. On the upper right of the profile, click "Download" to see all download options and choose "Contribution Statement".



3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

4. Click the "Generate PDF" button. The button will let you know when it is working and turn green when the statement is ready to download.

5. Click the green "Download" button to download your statement as a PDF that you can print.


Contribution Statement for Erin Collins
General
Customize
Range
Jan 1, 2023
to
Dec 31, 2023
last year / this year
Options
Generate empty statements for members who didn't give during date range.
Download

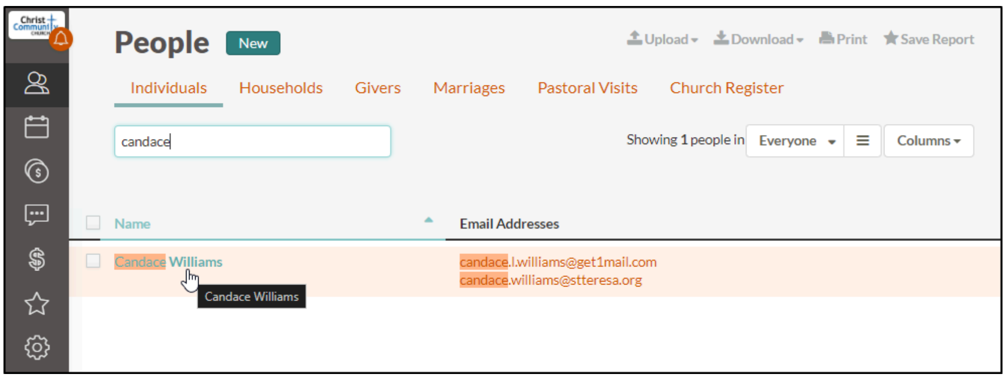
Emailing an Individual's Contribution Statement from their Profile

Individual contribution statements can be emailed from a person's profile in Church360° Members.

This feature is the best option to email a contribution statement for only one individual.

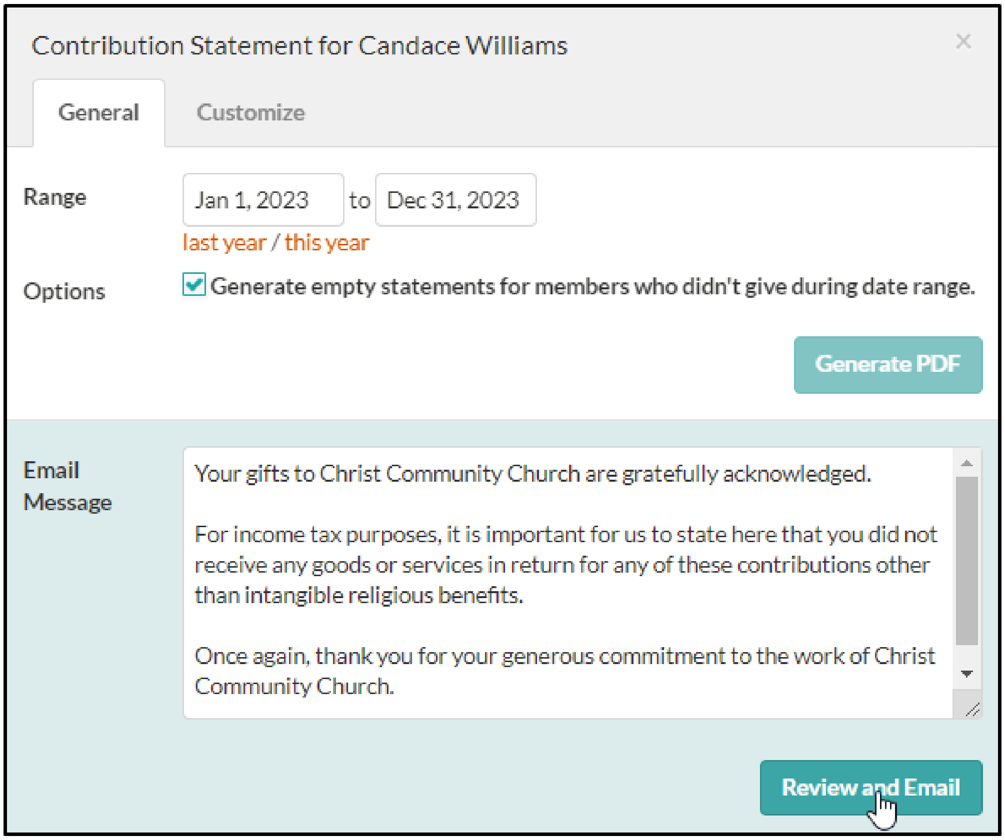
To email an individual their contribution statement,

1. Go to the People view and click on either the individual or household name to open the profile.



2. On the upper right of the profile, click "Download" to see all download options and choose "Contribution Statement".

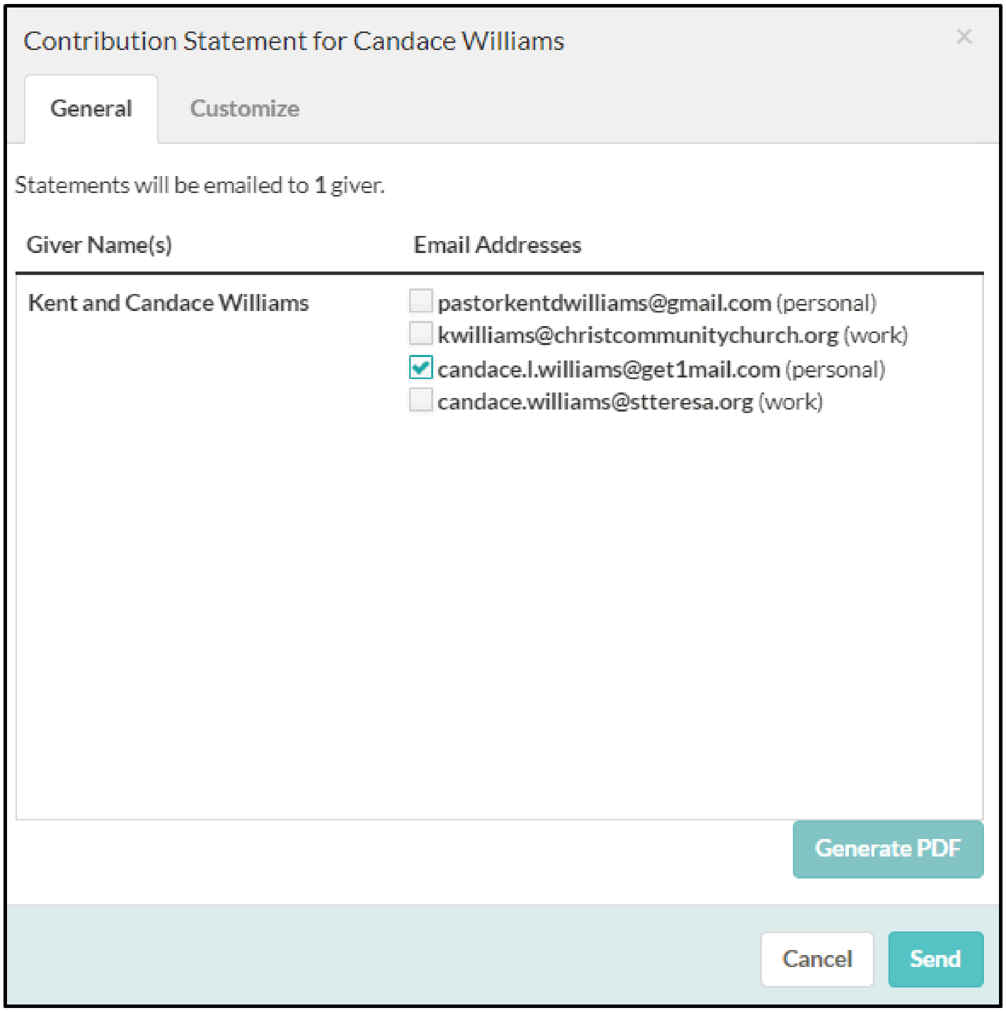
3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.



4. Edit the body of your email message in the box at the bottom of the screen.

5. Click on the “Review and Email” button to prepare your statements for email.

6. Select which of the available email addresses should receive the statement and click “Send.” The statement will then be emailed to the contributor.


Contribution Statement for Candace Williams
General
Customize
Statements will be emailed to 1 giver.
Giver Name(s)
Email Addresses
Kent and Candace Williams
pastorkentdwilliams@gmail.com (personal)
kwilliams@christcommunitychurch.org (work)
candace.l.williams@get1mail.com (personal)
candace.williams@stteresa.org (work)
Generate PDF
Cancel
Send

Printing or Exporting Profiles

If someone is transferring to another church, it could be helpful to print out their individual and household records to take with them to their new church. It can also be done to keep hard copies of member's information.

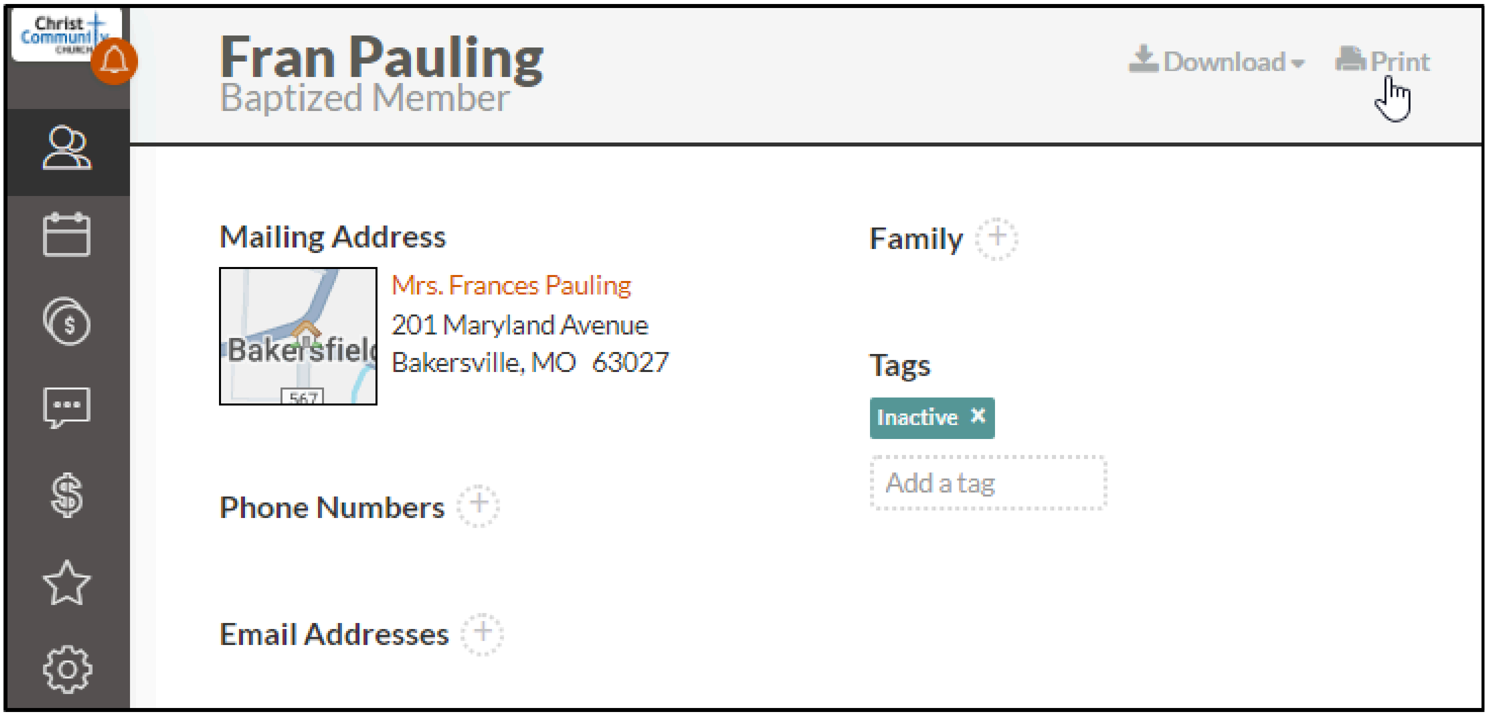
Note: Only fields and notes that are visible to the user printing the record will be included.

To print or export an individual or household record,

1. Go to the People view and click on either the individual or household name to open the profile.

2. On the upper right of the profile, click to download or print the record.

- Click "Download" to export the record into a CSV or Excel file.
- Click “Print” to open the record in a new browser tab. To print from the browser, press CTRL+P or right-click the page and choose “Print”.


Christ Community Church
Fran Pauling
Baptized Member
Download
Print
Mailing Address
Bakersfield
567
Mrs. Frances Pauling
201 Maryland Avenue
Bakersville, MO 63027
Phone Numbers
Email Addresses
Family
Tags
Inactive
Add a tag

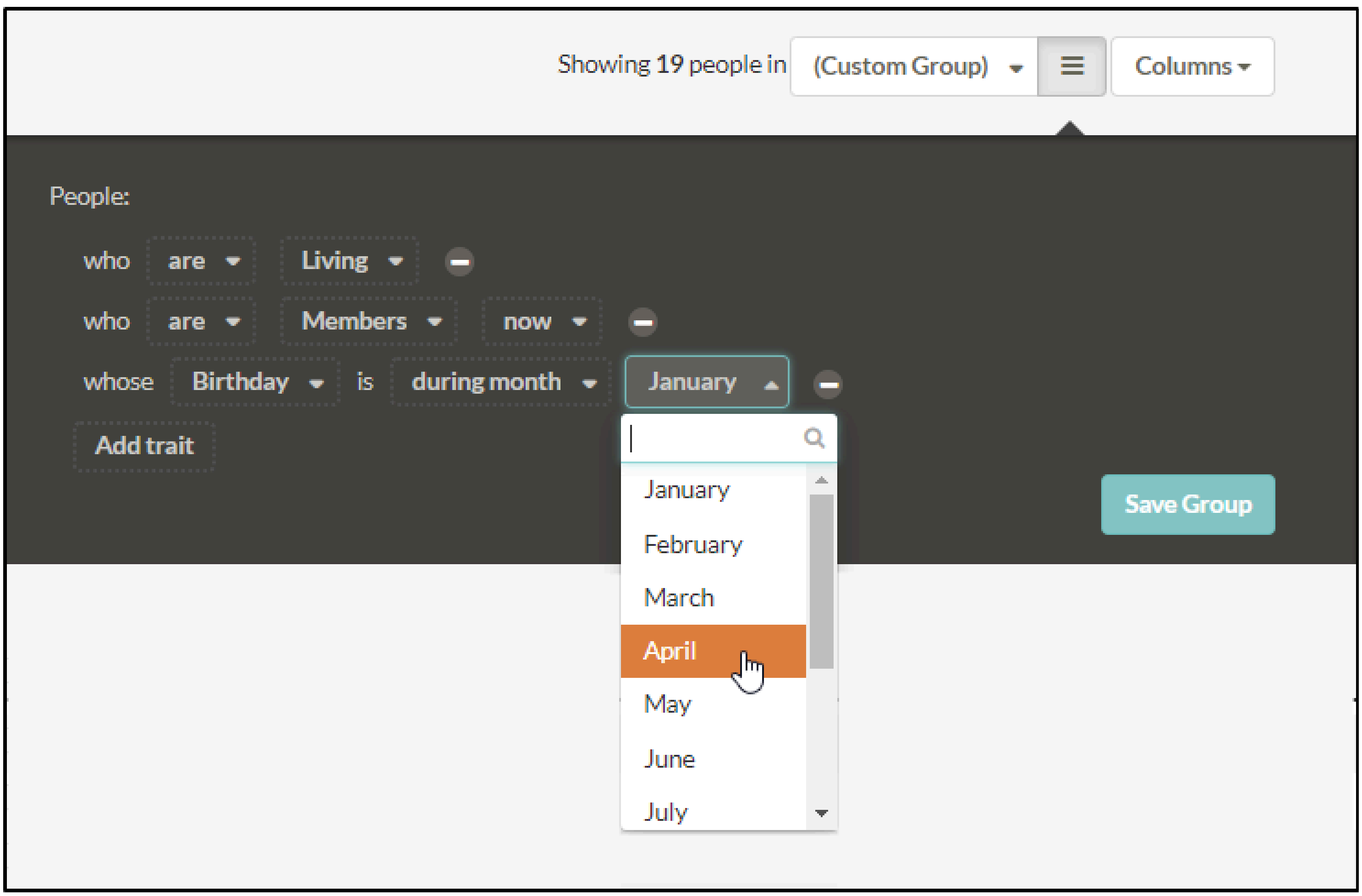
Saving Reports

Saving reports is a convenient way to create shortcuts for filtering results and columns that you use often. If you find yourself frequently filtering your People view by a specific Smart Group or specific columns, adding a report with these settings will give you quick access to this list in the Reports view.

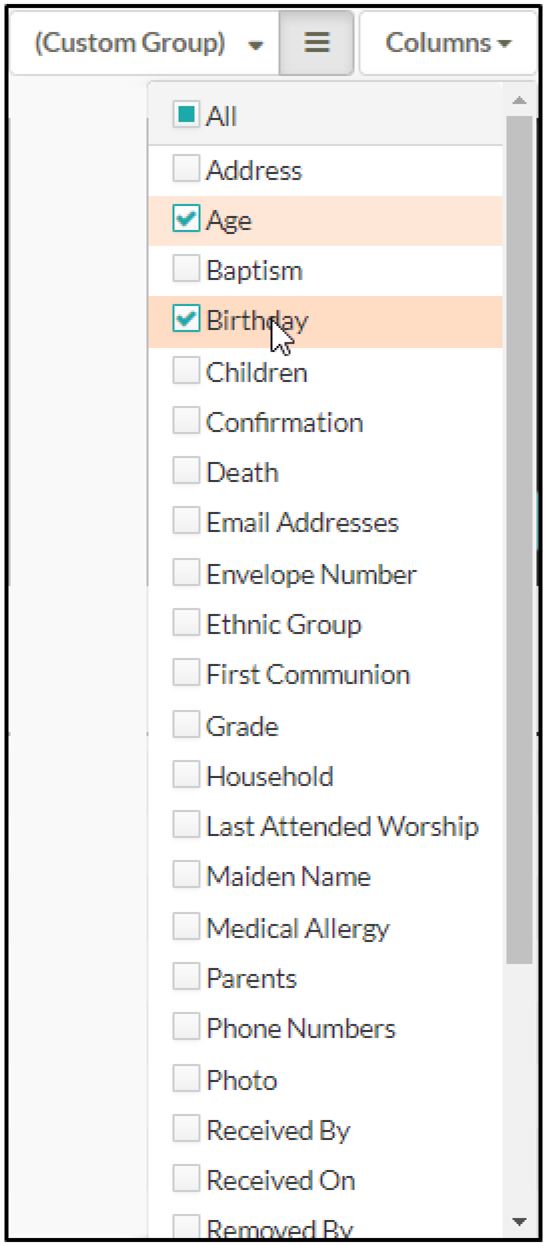
To create and save a report,

1. Go to a view you are looking to create a report on, such as People, Attendance, or Offerings.

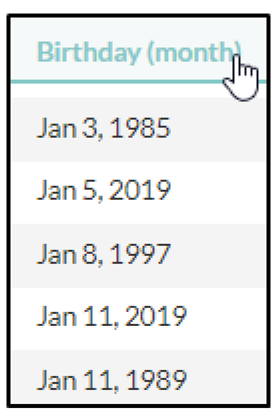
2. Filter your list as you need using the search bar, Smart Groups, or Smart Group traits.



3. Use the Columns drop-down menu to the far right of the screen to choose the columns you want to include in your list.



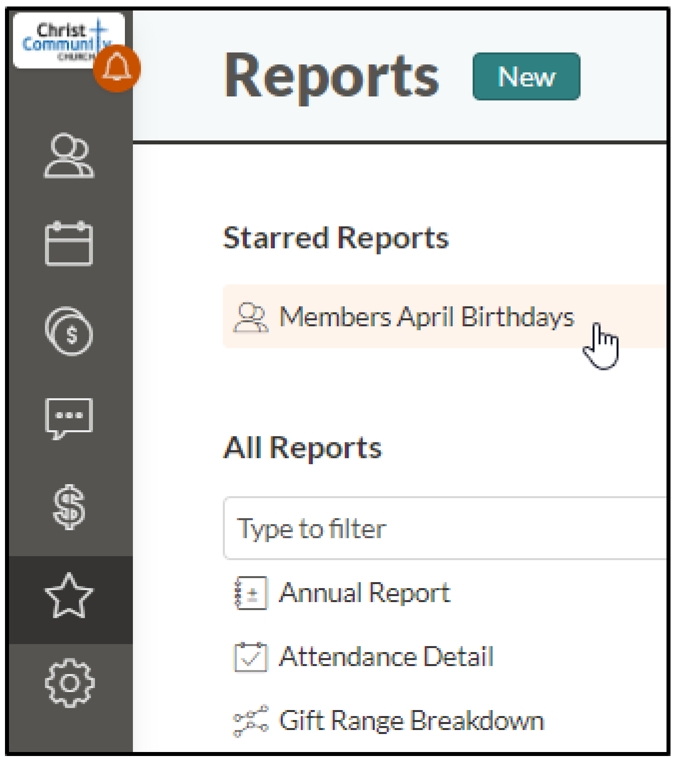
You can also click on column headers to sort your list.



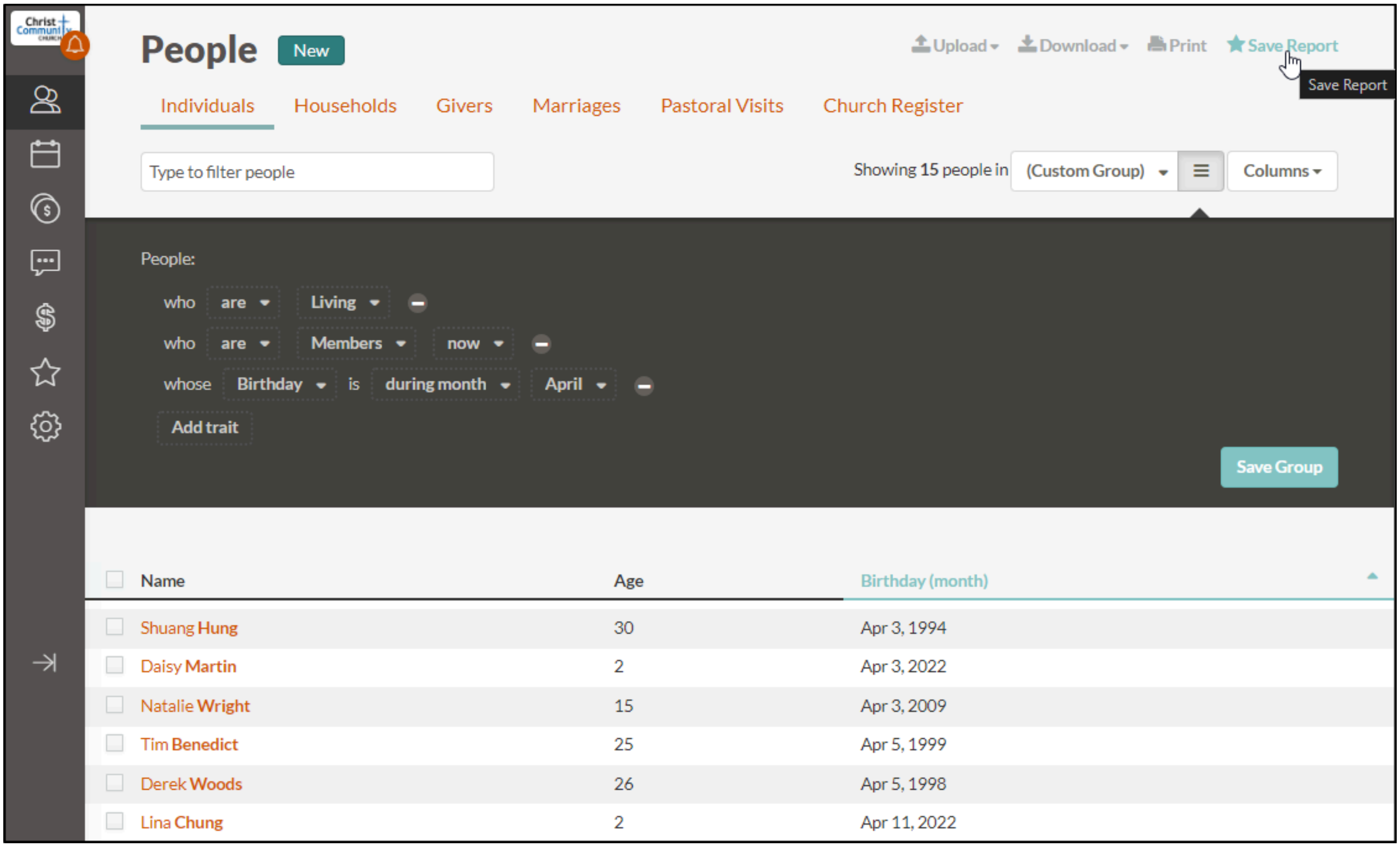
4. Once your report looks appropriate, you can click the Save Report link to the far right of the view.

5. Enter a title for your report and click the "Save" button to save your settings.

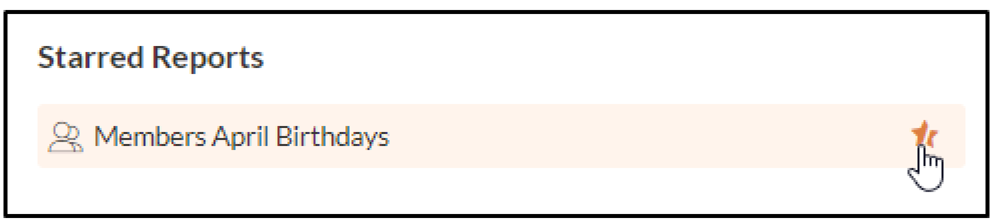
6. After saving, you can access your saved reports by going up to the Reports view and looking under the Starred Reports section. Your reports will only be seen by you, no other logins will have access to them.



7. If you need to edit your report, click the report's name under Starred Reports to be taken to the view. Add any changes for your report and click Save Report. In the pop-up, you can choose to save the changes to your report, or create a new report with the new settings.



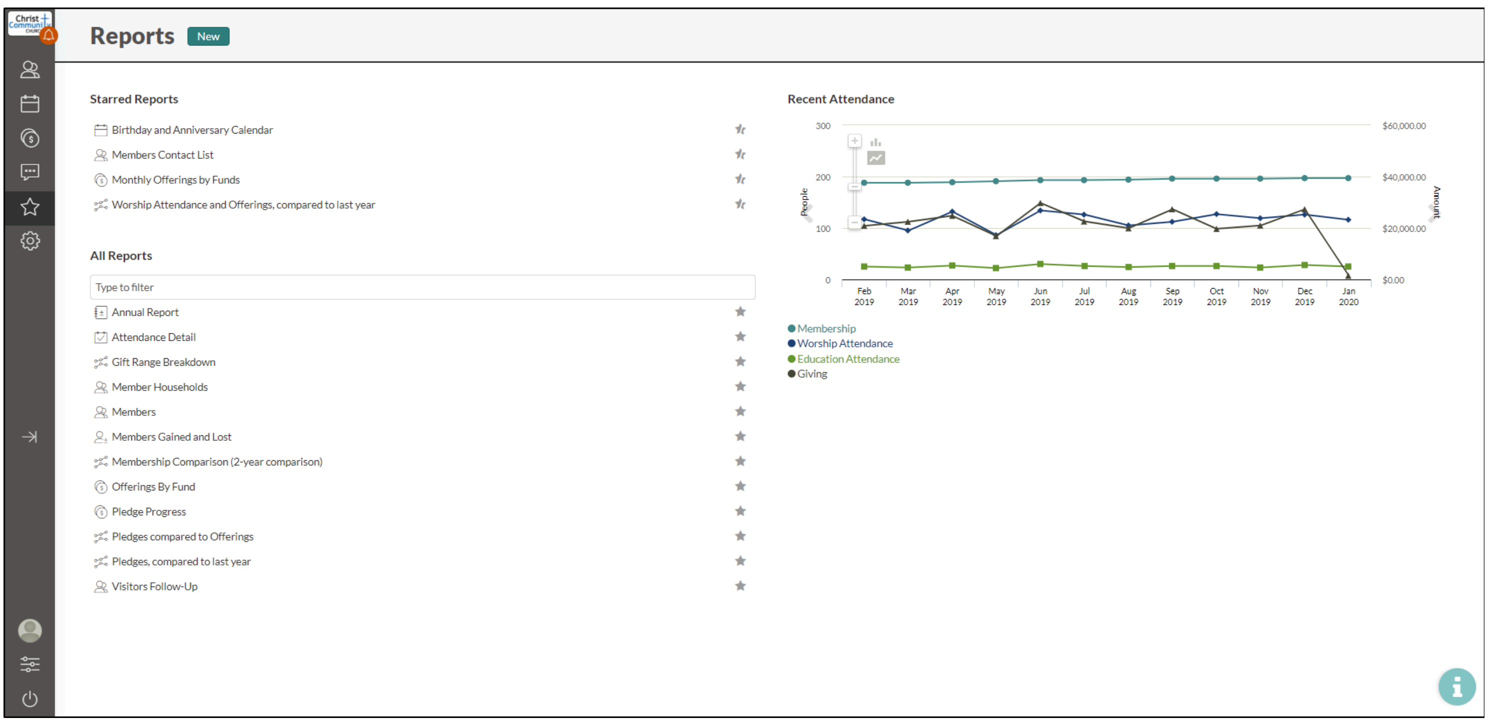
If you no longer need a report or want to delete it, go to the Reports view and click the star icon to the right of the report to remove it permanently.



Navigating the Reports View

There are two main divisions within the Reports view: Starred Reports and All Reports. Use these divisions to help you differentiate between reports you use regularly and reports you use on special occasions.

- Starred Reports are those reports you use most frequently. To star a report, select the report from the All Reports section and click on the star icon next to the report name. The report will automatically move into the Starred Reports section. If you click on the star next to any report in the Starred Reports section, the report will be deleted automatically.
- All Reports contains the reports built into Church360° Members, as well as reports created by other users in your account. Use the filter box to search for reports by name and to easily access your desired report. You may star a report in the All Reports section if you wish for it to be easily accessed in the Starred Reports section.



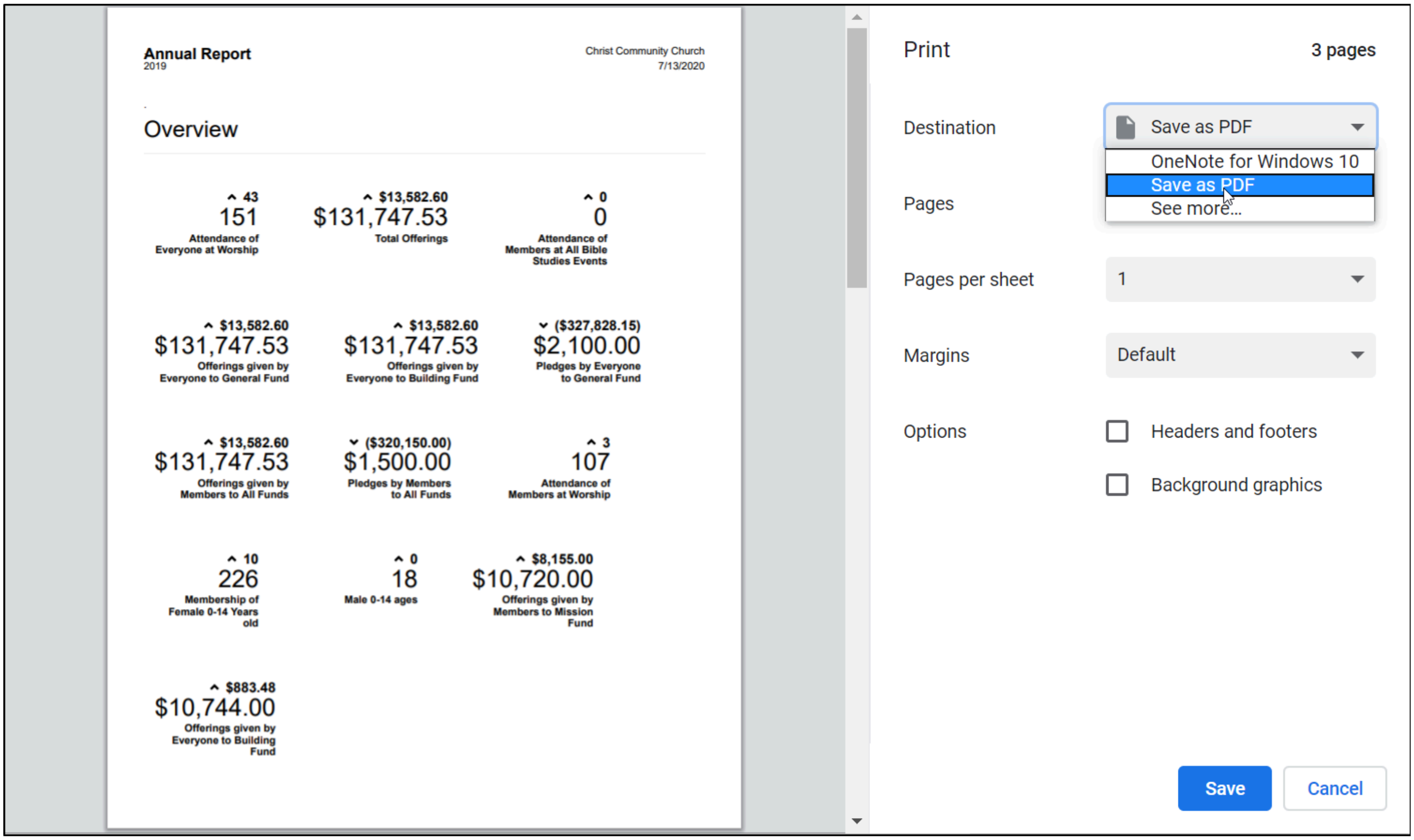
Generating Annual Reports

In Church360° Members, you can print annual reports for your church's denomination. These reports will include specific statistics and information about your church.

Rather than you recording all of this information for each report, Church360° Members will automatically enter the information from your site and generate the reports for you.

1. Click "Reports" in the Primary Navigation at the top of the screen.
2. Under "All Reports," click "Annual Report."
3. Select the year for your report, using the arrows next to the year.
4. Add any trends to your report, using the "Add Trend" button.
5. Check the settings for your membership demographics by clicking on the Settings cog within the Reports view.
6. Check your data health by scrolling down to the Accuracy section.
7. Click on the items listed to be taken to a view where you can edit individual profiles to complete the information.
8. Once your data is ready, click the "Print" button. Your report will appear in a new tab in your browser.
9. To print the report, press CTRL+P or click "File" and "Print."

Note: If your report needs to be emailed to your denomination, you may save the report as a PDF rather than sending it to your printer.



Annual Report
2019
Christ Community Church
7/13/2020
Overview
^ 43
151
Attendance of Everyone at Worship
^ $13,582.60
$131,747.53
Total Offerings
^ 0
0
Attendance of Members at All Bible Studies Events
^ $13,582.60
$131,747.53
Offerings given by Everyone to General Fund
^ $13,582.60
$131,747.53
Offerings given by Everyone to Building Fund
($327,828.15)
$2,100.00
Pledges by Everyone to General Fund
^ $13,582.60
$131,747.53
Offerings given by Members to All Funds
($320,150.00)
$1,500.00
Pledges by Members to All Funds
^ 3
107
Attendance of Members at Worship
^ 10
226
Membership of Female 0-14 Years old
^ 0
18
Male 0-14 ages
^ $8,155.00
$10,720.00
Offerings given by Members to Mission Fund
^ $883.48
$10,744.00
Offerings given by Everyone to Building Fund
Print
3 pages
Destination
Save as PDF
OneNote for Windows 10
Save as PDF
See more...
Pages
Pages per sheet
1
Margins
Default
Options
Headers and footers
Background graphics
Save
Cancel

Attendance Detail Report and Last Date Attended

The Attendance Detail Report is a view that shows a person's attendance, attendance percentage, and last date attended during a given date range. The report can be filtered by using Smart Groups and calendars.

You can select a date range by dragging the slider at the top of the view left or right. You can drag the ends of the slider to shorten or lengthen the date range, or you can click in the middle of the slider to drag the entire section without changing the length. Alternatively, you can click on the dates in the top left corner and use the calendar that drops down to adjust the date range.

You can change who is included in the report by changing the Smart Group in the top right corner. If you want to include people who did not attend, check the box next to "Include those who didn't attend" in the top left corner.

You can choose which calendars to include in the report by using the drop-down in the top right corner.

In the upper right corner are options to download, print, and save the report for future use. In addition, you can compare the same report to previous years that use the same date range and calendar selection.

> **Note**
>
> This view does not save any selected options. It will always default to showing all people on all calendars for the past six months, excluding those who didn't attend any event.

The bottom section of the view is a list of all people who attended in the chosen time frame based on the selected Smart Group and calendar. Next to each person's name should be a bubble representing each day. Here are the meanings of the different bubble colors:

- Blue: The person attended the event.
- Gray: The person did not attend the event.
- Light Gray: No event occurred on that day.

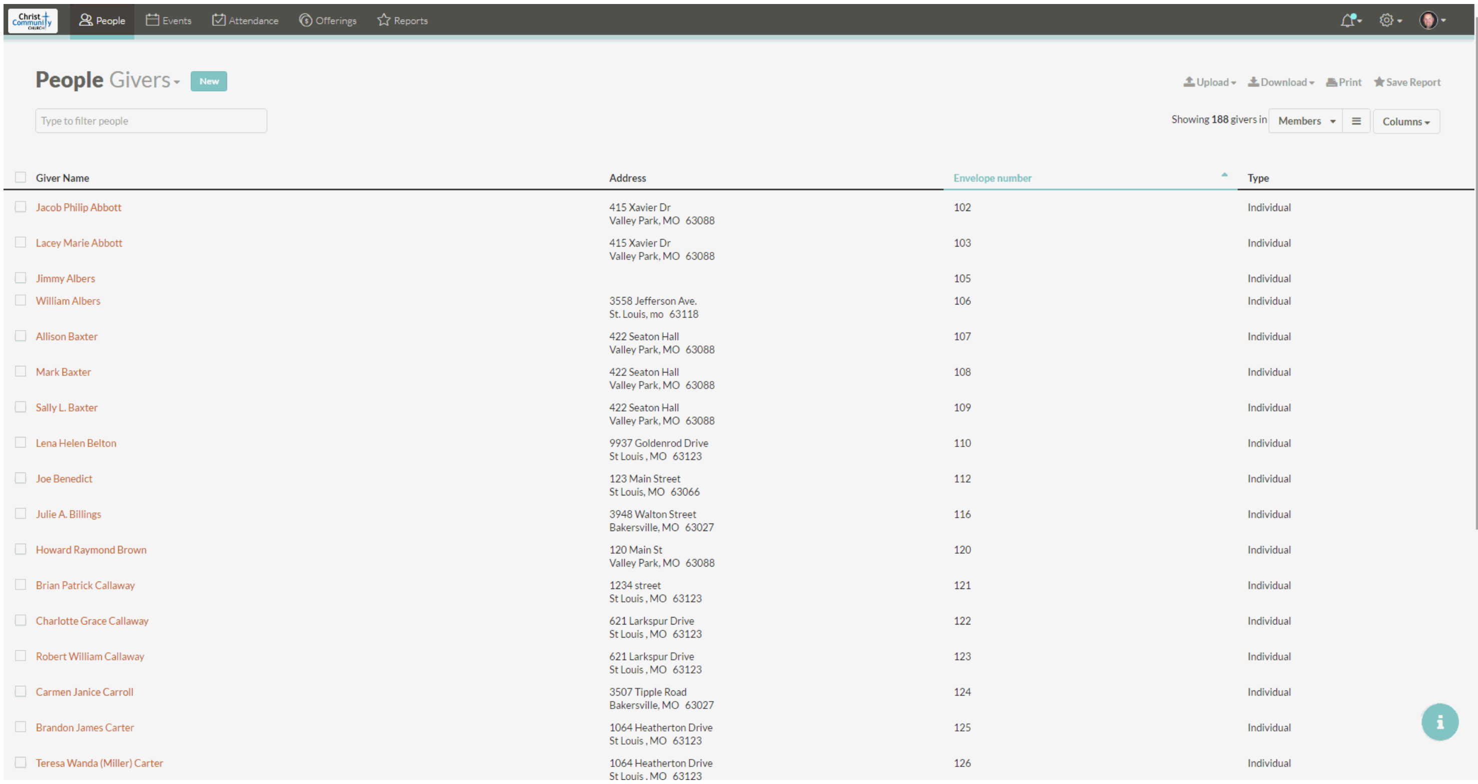
To the right of the bubbles are columns showing the last date the person attended an event, the total number of events the person attended, and the percentage of the events they attended, all based on the given date range. Click on the column headers to sort the view by those columns.

The rows next to people's names change color based on the percentage of the events the person attended. The darker the green, the higher the percentage is over 50%. The darker the red, the lower the percentage is under 50%.

> ### Note
>
> The Attendance Detail Report calculates attendance percentage using the following formula: the number of events the person attended divided by the number of weeks that have an event scheduled. This means that as long as a person attends at least one event on a week where an attendance event is scheduled, they will be marked as attending that week, instead of being marked down for not attending each event available that week.

Here is how to view and save an Attendance Detail Report:

1. Click "Reports" in the top navigation.
2. Select "Attendance Detail" from the list of reports.
3. Adjust the dates by dragging the slider or by using the calendar drop-down in the upper left corner.
4. Create or select a Smart Group from the drop-down in the upper right corner.
5. Select the calendars you want to include.
6. Click "Save" in the top right corner to save the report for future use.



Note: Your report will be saved for later viewing under the Reports tab. The report will be starred, which adds it to your report list as a favorite.

Note: The Attendance report calculates percentage of attendance by the following formula: *number of events person attended* divided by *number of weeks that have an event scheduled.* This means that as long as a person attends at least one event on a week where an attendance event is scheduled, they will be marked as attending that week, instead of being marked down for not attending each event available that week.

Note: You can set where a week starts from your General Settings menu. Click on the gear in the top right corner of the page and then select General Settings and then, in the "Start Week On" box, select which day you would like to count as the start of the week.

Default Reports

There are eleven default reports that will automatically generate as soon as you create your Church360°Members account. These built-in reports appear under "All Reports."

You cannot delete these built-in reports, but you may use them as abase for adding reports that more specifically meet the needs of your congregation.

- Annual Report: generates an annual report based on your denomination's requirements
- Attendance Detail: gives you an overview of attendance for all people in your church
- Gift Range Breakdown: compare trends in your contributors' giving ranges over time
- Members: sends you to a view of all the people marked as members in your congregation
- Members Gained and Lost: shows the net gain and loss in your membership over time
- Membership Comparison (2-year comparison):shows a year-by-year comparison of membership over time
- Offerings by Fund: breaks down offerings by fund totals
- Pledge Progress: compares giving and pledges by giving unit
- Pledges, Compared to Offerings: gives an overall snapshot of pledges and offerings over a specific time period
- Pledges, Compared to Previous Year: compares this year and last year's pledges
- Visitors Follow-Up: provides a list of visitors to follow up with
- Worship Attendance and Offerings, Compared to Previous Year: compares this year's worship and attendance to last year's worship and attendance

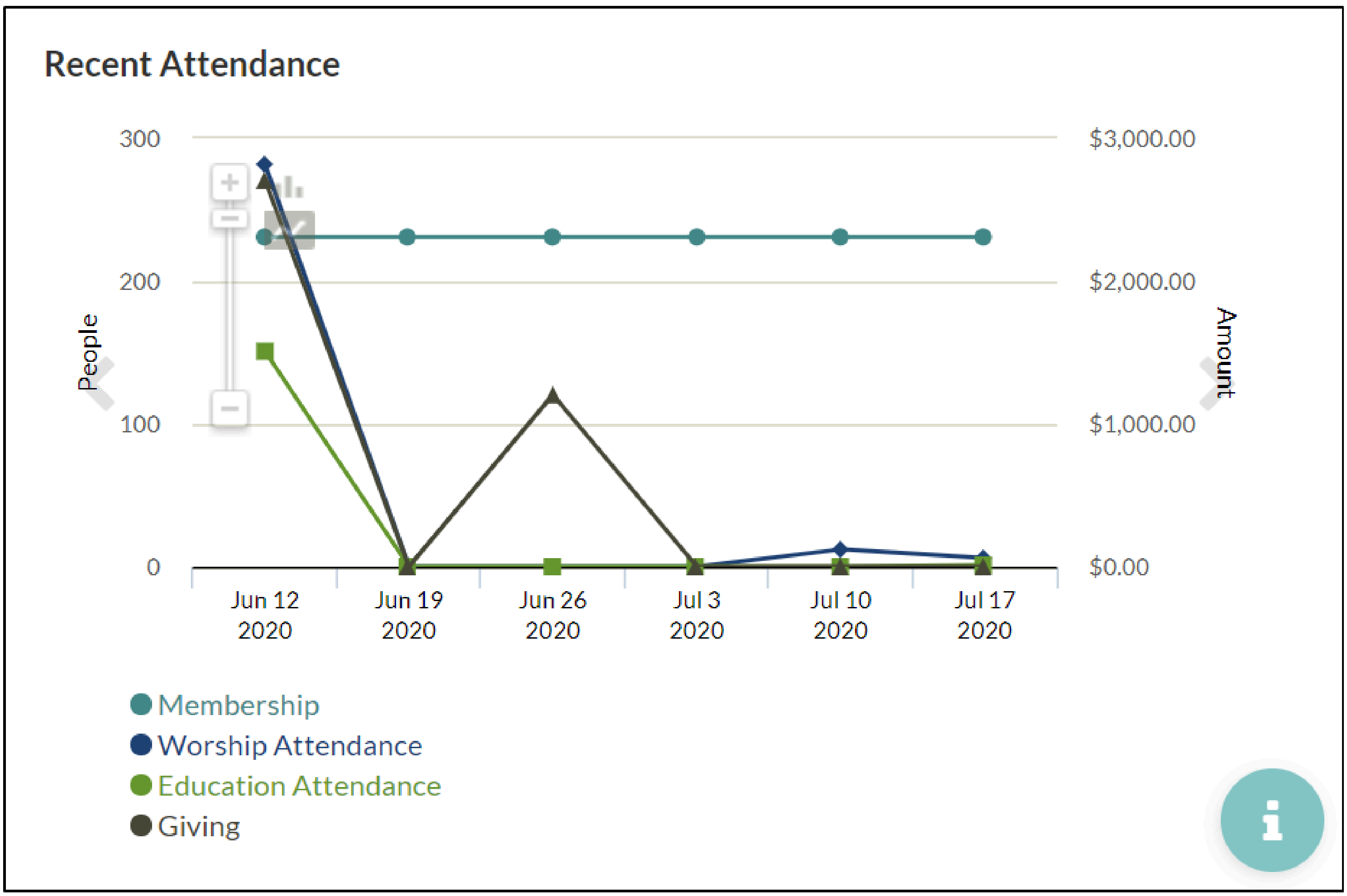

All Reports
Type to filter
Annual Report
Attendance Detail
Gift Range Breakdown
Member Households
Members
Members Gained and Lost
Membership Comparison (2-year comparison)

Recent Attendance Graph

The Recent Attendance Graph found on the right side of the Reports view displays a graphical representation of your membership, worship attendance, education attendance, and giving.

As new members are added, attendance is recorded, and offerings are entered, this graph will automatically adjust to reflect these updates.

1. The graph can be displayed as either a bar graph or a line graph.
2. Click the respective icons on the graph to update your view. You can zoom in or zoom out to view a different time frame by clicking the plus (+) or minus (–) signs or sliding the bar on the line to more finely adjust your view. To view different date ranges, use the arrow paddles on either side of the graph. The left arrow will show older dates, and the right arrow will expose newer dates.



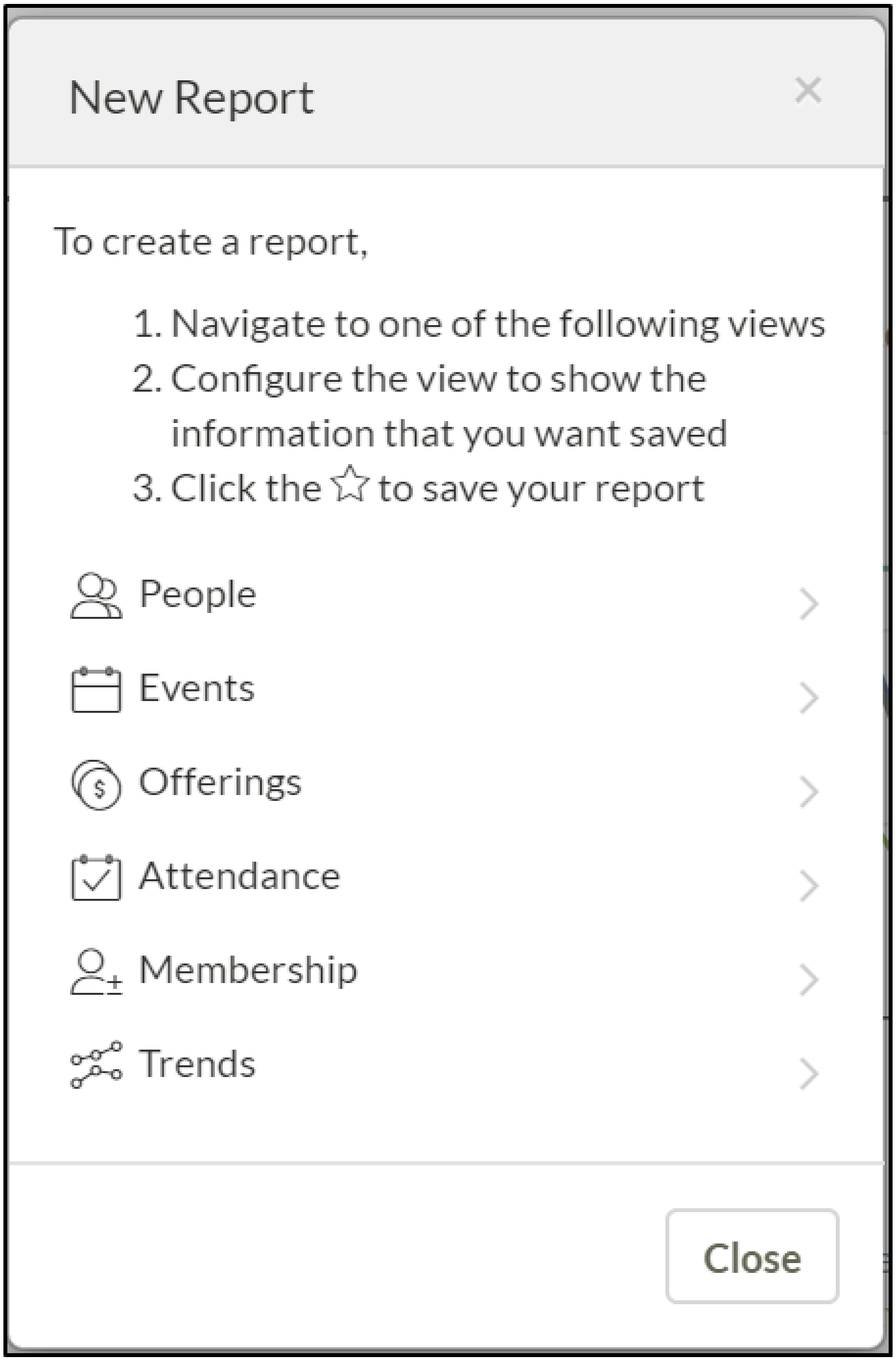
Creating New Reports

Reports save specific views from People, Events, Attendance, Offerings, Membership, or Trends.

Reports save information you view, email, or print frequently; they save you from defining your view every time you need to email a group of people or view attendance for a specific date range. For example, if you email the same ushers and greeters every week to send out the schedule, adding a report of your ushers and greeters will allow you to quickly and easily do so.

1. Click "Reports" in the Primary Navigation at the top of the screen.
2. Click the "New" button next to the"Reports" heading.
3. Select the report you want to create—either People, Events, Offerings, Attendance, Membership, or Trends. After selecting your report, the view you specified will open.
4. Filter this view until you have the desired Smart Groups, Tags, dates, or batches selected.
5. Click "Save Report" in the top right corner of the page to save the view. Your new report will appear in the Reports view under "Starred Reports."

Note: All reports that you create are automatically Starred Reports. If you "un-star" a report that you created, it will be deleted.


New Report
To create a report,
1. Navigate to one of the following views
2. Configure the view to show the information that you want saved
3. Click the ☆ to save your report
People
Events
Offerings
Attendance
Membership
Trends
Close

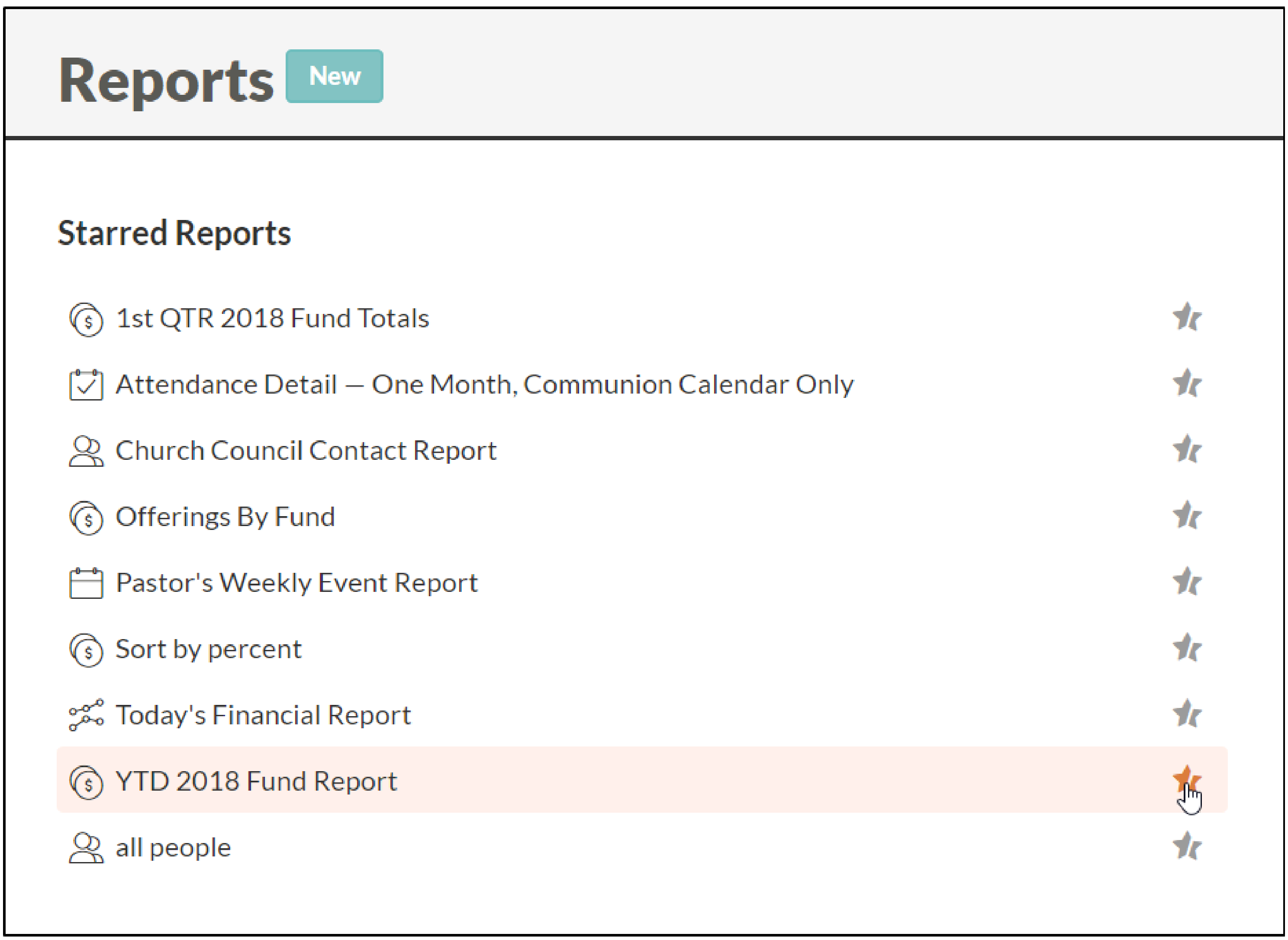
Deleting Reports

Reports created by you that are outdated or no longer in use can be deleted from the Reports view.

Default Reports cannot be deleted;these can be starred and un-starred asneeded.

1. Click on "Reports" in the Primary Navigation at the top of the screen.
2. Under "Starred Reports," find the report you wish to delete.
3. Click on the broken star to the right of the report.

Note: If you "un-star" a Default Report, it will return to "All Reports" and will not be deleted.



Comparing Trends

A Trends Report compares statistics across years. You can compare any statistics—Attendance, Offerings, Pledges, or Membership—from any event, by any group of people.

Trends graphically represent the numbers of your congregation. The graph allows you to easily compare giving from year-to-year, to notice spikes or declines in attendance, or to track an event's success over the years.

1. Click “Reports” in the Primary Navigation at the top of the screen.
2. Click the “New” button next to the “Reports”heading. Select “Trends.”
3. Click the “New” button next to the “Trends”heading.
4. Specify which criteria you want to compare, at which event, and from which group of people.
5. Choose a name for your trend. Click the“Add Trend” button to create your trend.
6. To compare trends over time, click the“Compare” button underneath the “Trends”heading.
7. Select the number of years you want to compare. The graph on the screen will visually represent the numbers from the criteria you chose.
8. To change from a line to a bar graph, select the appropriate option on the left side of the screen.

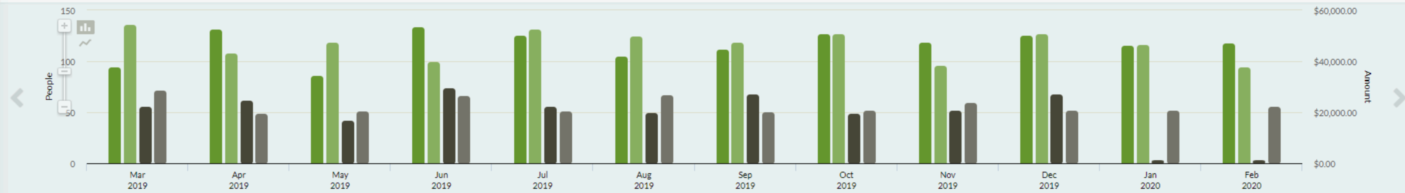
Hovering over any of the points on the graph will show the details of that point, such as the name of the trend the point is on, the date, and the statistic.

To see more details of a specific trend, click on the name of the trend below the graph to open that trend's details.

Trends New

Download Print Save Report

Compare 2 years

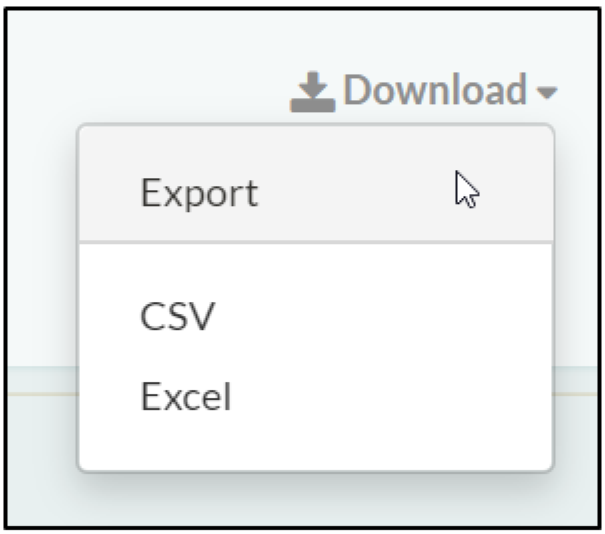


	Mar 2019	Apr 2019	May 2019	Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020
Attendance of Everyone at Worship (2019) Edit Delete	95	132	86	134	126	105	112	127	119	126	116	118
Attendance of Everyone at Worship (2018)	136	108	119	100	132	125	119	127	96	127	117	95
Offerings given by Everyone to All Funds (2019) Edit Delete	$22,445.00	$24,750.00	$16,860.00	$29,730.00	$22,550.00	$19,890.00	$27,310.00	$19,670.00	$20,965.00	$27,300.00	$1,425.00	$1,405.00
Offerings given by Everyone to All Funds (2018)	$28,935.00	$19,585.00	$20,625.00	$26,650.00	$20,485.00	$26,905.00	$20,235.00	$21,045.00	$23,805.00	$20,930.00	$20,865.00	$22,445.00

Exporting Reports to CSV or Excel

Since reports are essentially statistic data lists for your church, you can export these reports so you can view them in a spreadsheet.

1. Create your report and select it on the Reports page.
2. Click "Download" at the top of the screen.
3. Select either CSV or Excel. Your report will automatically begin to download.
4. Click the file to open it after the download is finished.



Printing Reports

After adding reports in Church360° Members, you may want or need hard copies to share with your congregation.

Printing a report gives you a hard copy of your church's statistical information. When printing trends, the statistics and the chart will print as well.

1. Create your report and select it on the Reports page. Click "Print" at the top of the screen. A newtab will open in your browser.
2. Press CTRL+P or click "File" and "Print.

Note: In the top-right corner of the print window, there is a button to switch between portrait and landscape printing.

Navigating the Financial Reports Writer

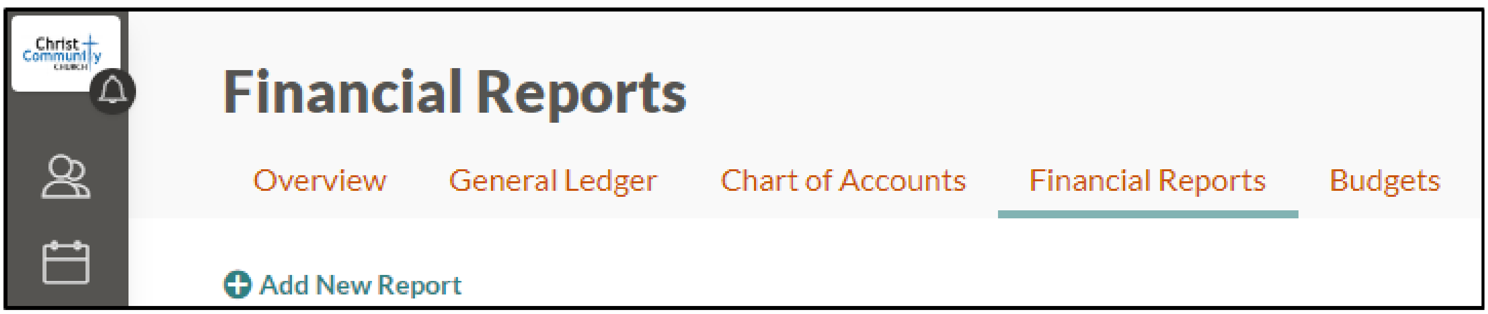
After receiving extensive feedback about additional reporting for financial balances and activity, CTS has created a brand new report writer built to allow as much or as little customization for reporting as users could want.

When navigating to the Financial Reports view, users will see a list of available default reports as well as any reports created by other users.

All reports can be created, shared, saved, then used with different fiscal years and months.

Action Button

Like other views, the Financial Reports view has an action button to create a new report.



Report List

From this list of reports, you can view each report's name and author.

The default reports are as follows:

- Balance Sheet - This account report shows the starting balance, ending balance, total debits, total credits, and differences of the chosen fiscal year, for all asset, and liability accounts in the current chart of accounts.
- Chart of Accounts - This account report shows the starting balance, ending balance, total debits, total credits, and differences of the chosen fiscal year, for all accounts in the current chart of accounts.
- Check Register - This ledger report shows all checks and their details for all accounts created within a chosen date range.

- General Ledger - This ledger report shows all transactions, their details, and a running balance for all accounts created within a chosen date range.
- Statement of Income and Expense - This account report shows the budget, actual, percent of budget, and budget remaining for the chosen fiscal year.

Report	Author
Balance Sheet	Church360°
Chart of Accounts	Church360°
Check Register	Church360°
General Ledger	Church360°
Statement of Income and Expense	Church360°

Actions for Reports

- Add to Favorites - The star icon to the far right of a report name will mark it as one of your favorites to make it easier to find and access.
- Delete Report - The trash can icon to the far right of a report name will remove the report from your view. Only the original author of a report can delete their own reports from all user views.
- Edit Report - The pencil icon to the far right of a report name will open the report in an edit window that users can change different settings, columns, and calculations and resave it or save it as a copy.
- View Report - The arrow icon to the far right of a report name will open the report in a viewable format where users will only be able to edit the fiscal year and month as needed.

Balance Sheet Report

Definition & Purpose:

The Balance Sheet report summarizes asset and liability accounts from the start of the fiscal year to the end of the fiscal year, and calculations on their changes.

Structure:

The default Balance Sheet report displays beginning and ending balances, debit and credit totals, and change calculations for the entirety of the chosen fiscal year. A summary at the end displaying totals for assets less liabilities for each column is located at the bottom of the report.

Report:

More information regarding the setup of the report can be seen when it is opened for editing (by clicking the pencil icon to the right of the report name on the Financial Reports list).

Row defaults can be edited on the left side of the report.

Row Defaults:

- Account types are filtered to show only asset and liability accounts. For other grouping and exclusion options, Report Tags can also be used.
- The chart depth is used to determine the level of detail within the report, with a default setting to show all individual accounts.
- The Summary chosen includes assets (as a positive balance) and liabilities (as a negative balance), which allows for a difference of assets less liabilities to display at the bottom of the report.

Columns can be added from the right side of the report or edited by clicking on an existing column header.

Column Defaults:

- The first column, by default, displays the balance for each row at the start of the fiscal year, regardless of the selected fiscal period (month or quarter).

- The second column, by default, displays the balance for each row at the end of the fiscal year, regardless of the selected fiscal period (month or quarter).
- The third column, by default, summarizes the total annual debit activity for each row, regardless of the selected fiscal period (month or quarter).
- The fourth column, by default, summarizes the total annual credit activity for each row, regardless of the selected fiscal period (month or quarter).
- The fifth column, by default, calculates the difference between the ending balance (second column) and the beginning balance (first column), showing the net change amount.
- The fifth column, by default, calculates the percentage of change by dividing the net change amount (fifth column) by the beginning balance (first column).

Note: Since this is a default report, any edits to rows or columns will need to be saved as a copy in the upper right corner, under a different name.

Chart of Accounts Report

Definition & Purpose:

The Chart of Accounts report shows a snapshot of every account in a book from the start of the fiscal year to the end of the fiscal year and calculations on their changes.

Structure:

The default Chart of Accounts report displays beginning and ending balances, debit and credit totals, and change calculations for the entirety of the chosen fiscal year.

Report:

More information regarding the setup of the report can be seen when it is opened for editing (by clicking the pencil icon to the right of the report name on the Financial Reports list).

Row defaults can be edited on the left side of the report.

Row Defaults:

- Since this report is meant to show the entire chart of accounts, all accounts are shown by default.
- The chart depth is used to determine the level of detail within the report, with a default setting to show all individual accounts.
- No summaries are chosen for this report by default.

Columns can be added from the right side of the report or edited by clicking on an existing column header.

Column Defaults:

- The first column, by default, displays the balance for each row at the start of the fiscal year, regardless of the selected fiscal period (month or quarter).
- The second column, by default, displays the balance for each row at the end of the fiscal year, regardless of the selected fiscal period (month or quarter).
- The third column, by default, summarizes the total annual debit activity for each row, regardless of the selected fiscal period (month or quarter).

- The fourth column, by default, summarizes the total annual credit activity for each row, regardless of the selected fiscal period (month or quarter).
- The fifth column, by default, calculates the difference between the ending balance (second column) and the beginning balance (first column), showing the net change amount.
- The fifth column, by default, calculates the percentage of change by dividing the net change amount (fifth column) by the beginning balance (first column).

Note: Since this is a default report, any edits to rows or columns will need to be saved as a copy in the upper right corner, under a different name.

Check Register Report

Definition & Purpose:

The Check Register report displays all check transactions for all asset accounts for a chosen date range.

Structure:

The default Check Register displays all asset accounts for only the check transaction types. Checks are grouped and ordered by account as they are ordered in the chart of accounts.

Report:

More information regarding the setup of the report can be seen when it is opened for editing (by clicking the pencil icon to the right of the report name on the Financial Reports list).

Selection defaults can be edited on the left side of the report.

Selection Defaults:

- Using the Ledger-based section, accounts are not filtered by account type.
- By default, only asset accounts are selected.
- By default, only the check transaction type is selected.

Display Defaults:

- Line items are grouped by account.
- Accounts are ordered in the same way as they are set up in the Chart of Accounts view.
- Transactions are ordered in chronological order to allow for a running balance to be calculated.
- Check numbers are listed in parentheses under Type.
- Check memos are shown under Description.

Note: Since this is a default report, any edits to selections will need to be saved as a copy in the upper right corner, under a different name.

General Ledger Report

Definition & Purpose:

The General Ledger report displays transaction line items for all selected accounts for a chosen date range.

Structure:

The default General Ledger displays line items for all accounts of all transaction types. Line items are grouped and ordered by account as they are ordered in the chart of accounts.

Report:

More information regarding the setup of the report can be seen when it is opened for editing (by clicking the pencil icon to the right of the report name on the Financial Reports list).

Selection defaults can be edited on the left side of the report.

Selection Defaults:

- Using the Ledger-based section, accounts are not filtered by account type.
- By default, all accounts are selected.
- By default, all transaction types are selected.

Display Defaults:

- Line items are grouped by account.
- Accounts are ordered in the same way as they are set up in the Chart of Accounts view.
- Transactions are ordered in chronological order to allow for a running balance to be calculated.
- Check numbers are listed in parentheses under Type.
- Transaction memos are shown under Description for main accounts.
- Line item descriptions are shown under Description for offset accounts.

Note: Since this is a default report, any edits to selections will need to be saved as a copy in the upper right corner, under a different name.

Statement of Income and Expense Report

Definition & Purpose:

The Statement of Income and Expense report summarizes the annual budget and actual comparisons of all income sources and expenses, accurately displaying activity for the fiscal year and providing transparency.

Structure:

The default Statement of Income and Expense report displays the annual budget and actuals for all income and expense accounts, including those attached to Funds. A summary at the end displaying totals for income less expense for each column is located at the bottom of the report.

Report:

More information regarding the setup of the report can be seen when it is opened for editing (by clicking the pencil icon to the right of the report name on the Financial Reports list).

Row defaults can be edited on the left side of the report.

Row Defaults:

- Account types are filtered to show only income, expense, and fund-type accounts. For other grouping and exclusion options, Report Tags can also be used.
- The chart depth is used to determine the level of detail within the report, with a default setting to show all individual accounts.
- The Summary chosen includes income (as a positive balance) and expense (as a negative balance), which allows for a difference for income less expense to display at the bottom of the report.

Columns can be added from the right side of the report or edited by clicking on an existing column header.

Column Defaults:

- The first column, by default, calculates the overall annual budget for each row, regardless of the selected fiscal period (month or quarter).

- The second column, by default, calculates the overall annual actual for each row, regardless of the selected fiscal period (month or quarter).
- The third column, by default, calculates the percentage of the budget used by dividing the actual total (second column) by the budget total (first column).
- The fourth column, by default, calculates the difference between the budget (first column) and the actual (second column), showing the budget remaining.

Note: Since this is a default report, any edits to rows or columns will need to be saved as a copy in the upper right corner, under a different name.

Creating a Custom Finance Report

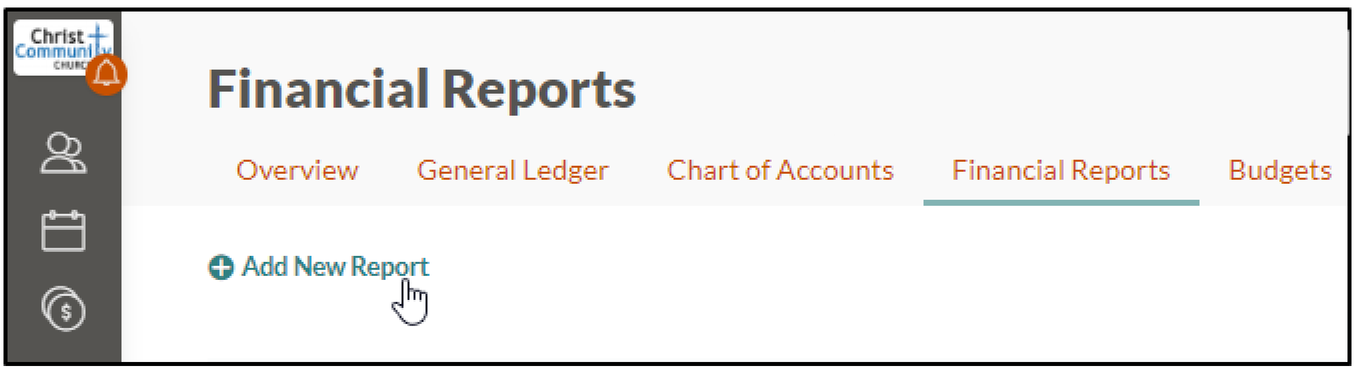
The report writer for Financial Reports in Church360° is a robust and highly customizable utility that users can use to create their own account- or transaction-based reports as their church needs.

This article will go through different types of reports, columns, and calculations available in the current system. Due to constant improvements and additions, this article might not be all-inclusive of every feature and calculation.

To create a new custom report,

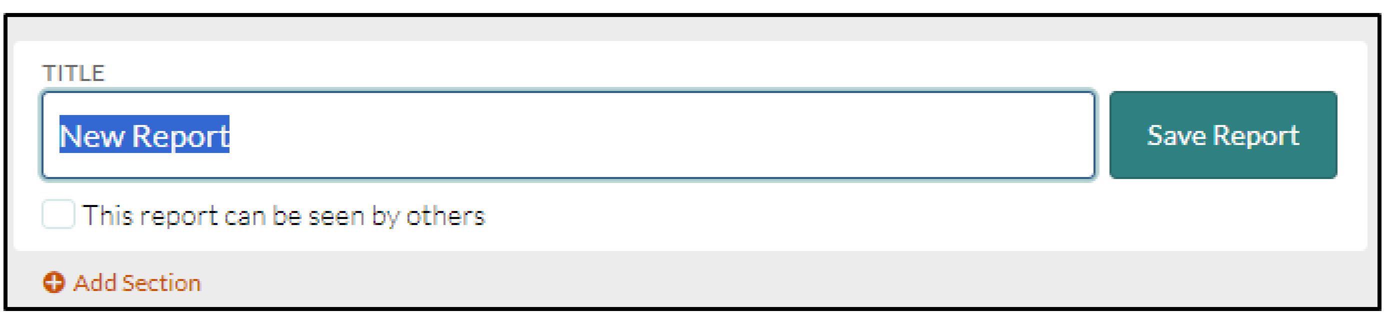
1. Navigate to Ledger and choose the Financial Reports tab.

2. Click "Add New Report" to open a new template.



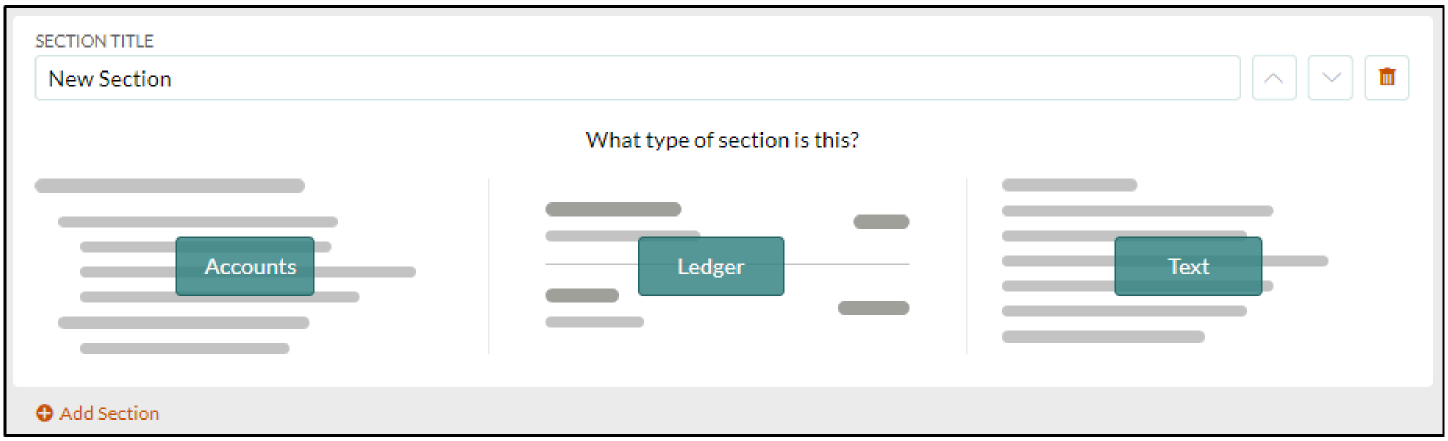
3. Enter a new title for the Report. Reports must have unique names in order to be saved.

4. Check the box "This report can be seen by others" to make it visible to other users on your Church360° site with access to finance reports.

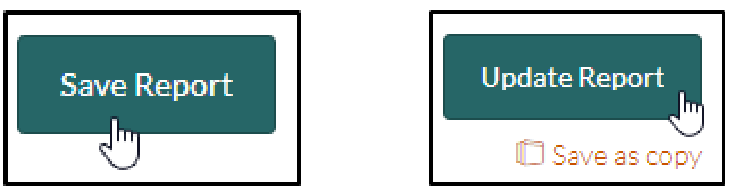


5. Click "Add Section" to add a new section to report on. There are three section types.

- Accounts - This type of report section gives summaries and totals for accounts for a chosen fiscal year and month. This includes calculations regarding budgets, actuals, and account balances.
- Ledger - This type of report section gives specific information related to transactions for a chosen date range. This includes data regarding transaction types, payees, descriptions, and running balances.
- Text - This type of report section offers a text field that users can use to add summaries or additional details to be printed along with the other sections in the report.



6. Add sections to the report as needed and click "Save Report" or "Save as copy" when finished.



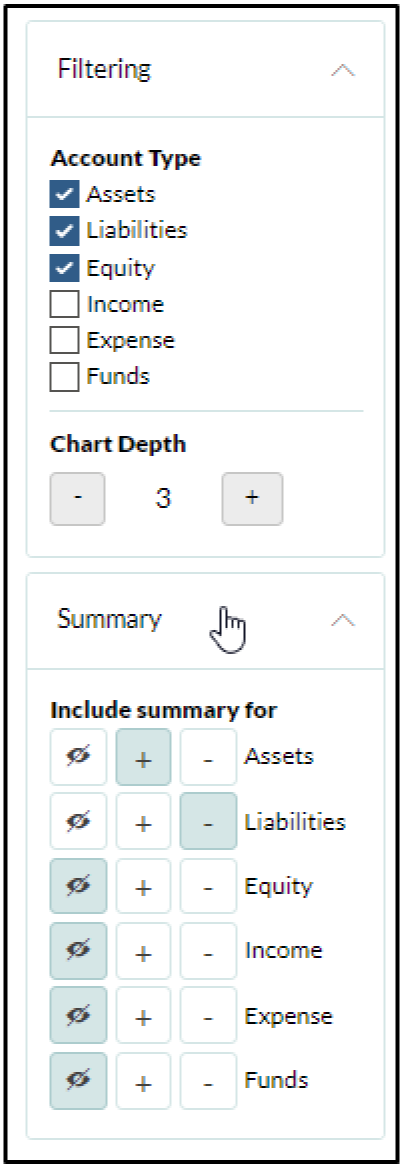
To customize an Accounts section,

1. Add a title to the new section as needed.

2. Select the default fiscal year and month to be used for this section. Users viewing the report later will be able to change this as needed.

3. On the left side of the section, there are filtering options based on account type and depth.

- Account Type - Use the checkboxes to select or deselect the account types you want to include on the report.
- Chart Depth - Use the plus and minus buttons to show or hide additional depth under individual accounts or their parent accounts.
- Summary - To add a summary calculation, click here and use the plus and minus buttons to add chosen account types for the equation at the bottom of the section.



4. On the right side of the section, users can add up to thirteen columns as needed. When selecting a column, users will also select the date range to calculate for. Users can edit the column name as needed and click the "Add" button to add the column to the section.

- Budgets
    - Chosen month and year - This option will add the budget total for only the chosen fiscal month and year.

- XX Months Before Chosen month and Year - This option will add the budget total for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.
- Year-To-Date - This option will add the budget total from the beginning of the fiscal year to today's date, regardless of the chosen fiscal month.
- Year-To-Chosen month - This option will add the budget total from the beginning of the fiscal year to the end of the chosen month.
- This Year - This option will add the budget total for the entirety of the chosen fiscal year.
- XX Years Ago - This option will add the budget total for the entirety of the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.

- Actuals
  - Chosen month and year - This option will add the actual total for only the chosen fiscal month and year.
  - XX Months Before Chosen month and year - This option will add the actual total for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.
  - Year-To-Date - This option will add the actual total from the beginning of the fiscal year to today's date, regardless of the chosen fiscal month.
  - Year-To-Chosen month - This option will add the actual total from the beginning of the fiscal year to the end of the chosen fiscal month.
  - This Year - This option will add the actual total for the entirety of the chosen fiscal year.
  - XX Years Ago - This option will add the actual total for the entirety of the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.
- Credits
  - Chosen month and year - This option will add the total amount of credits for only the chosen fiscal month and year.
  - XX Months Before Chosen month and year - This option will add the total amount of credits for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.

    - Year-To-Date - This option will add the total amount of credits from the beginning of the fiscal year to the today's date, regardless of chosen fiscal month.
    - Year-To-Chosen month - This option will add the total amount of credits from the beginning of the fiscal year to the end of the chosen fiscal month.
    - This Year - This option will add the total amount of credits for the entirety of the chosen fiscal year.
    - XX Years Ago - This option will add the total amount of credits for the entirety of the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.
- Debits
    - Chosen month and year - This option will add the total amount of debits for only the chosen fiscal month and year.
    - XX Months Before Chosen month and year - This option will add the total amount of debits for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.
    - Year-To-Date - This option will add the total amount of debits from the beginning of the fiscal year to the today's date, regardless of chosen fiscal month.
    - Year-To-Chosen month - This option will add the total amount of debits from the beginning of the fiscal year to the end of the chosen fiscal month.
    - This Year - This option will add the total amount of debits for the entirety of the chosen fiscal year.
    - XX Years Ago - This option will add the total amount of debits for the entirety of the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.
- Starting Balance
    - Chosen month and year - This option will add the starting balance for the chosen fiscal month and year.
    - XX Months Before Chosen month and year - This option will add the starting balance for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.
    - This Year - This option will add the starting balance for the chosen fiscal year.

- XX Years Ago - This option will add the starting balance for the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.

- Ending Balance
  - Chosen month and year - This option will add the ending balance for the chosen fiscal month and year.
  - XX Months Before Chosen month and year - This option will add the ending balance for a single month preceding the chosen month and year. How far back the month precedes is dependent on the number selected by the user.
  - Year-To-Date - This option will add the ending balance as of today's date, regardless of chosen fiscal month.
  - This Year - This option will add the ending balance for the chosen fiscal year.
  - XX Years Ago - This option will add the ending balance for the year before the chosen fiscal year. How far back the year precedes is dependent on the number selected by the user.

- Percent
  - This option divides one column by another and reports the result as a percentage. Both columns must be added to the report before this calculation can be done.

- Difference
  - This option subtracts one column from another. If the difference is negative, it is shown as a negative number. Both columns must be added to the report before this calculation can be done.

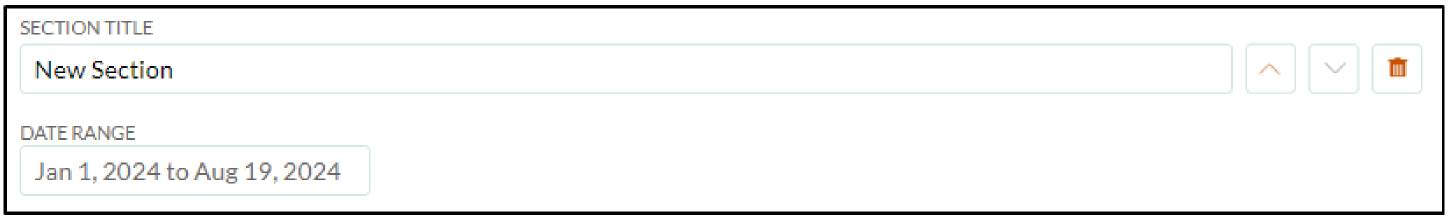
- Ahead/Behind
  - This option subtracts one column from another. If the difference is negative, it is shown in parenthesis. Both columns must be added to the report before this calculation can be done.

5. Continue to add columns as needed. When finished, users can add another section or save the report for future use.

To customize a Ledger section,

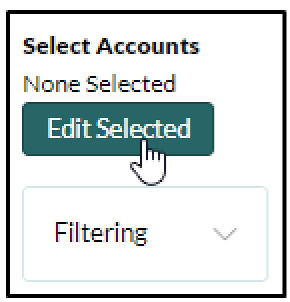
1. Add a title to the new section as needed.

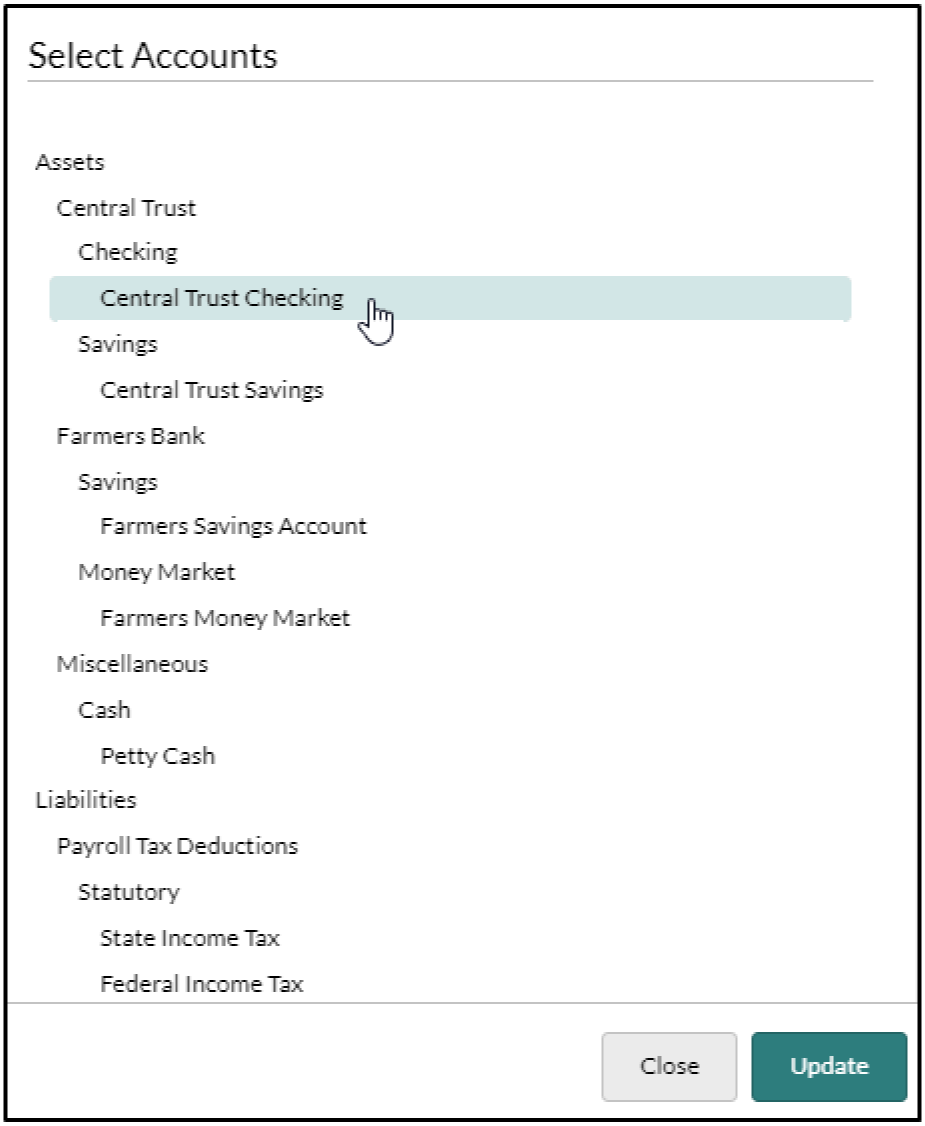
2. Select the date range to be used for this section. Users viewing the report later will be able to change this as needed.



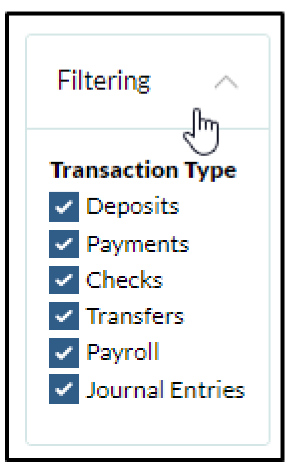
3. On the left side of the section, there are filtering options based on account and transaction type.

- Select Accounts - Click "Edit Selected" to open a list of available accounts to select or deselect the account users want to include on the report. Click "Update" to save selections.





- Filtering - To filter based on transaction type, click here and use the checkboxes to select or deselect transaction types users want to include on the report.

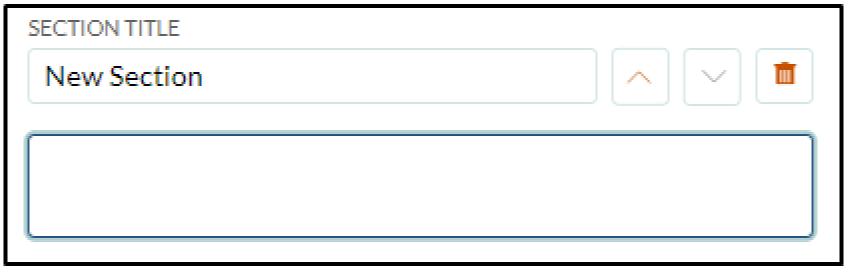


4. When finished, users can add another section or save the report for future use.

To customize a Text section,

1. Add a title to the new section as needed.

2. Enter in any text supplement for the report. This can include treasurer notes, summaries, audit comments, or other additional explanations to be included.



3. When finished, users can add another section or save the report for future use.

Introducing Ledger Report Tags

In Church360° Ledger, Report Tags allow accounts to be categorized for custom reporting.

There are certain tag groups that are provided by default in Church360°, for use with the Statement of Activities and Statement of Financial Positions reports. These reports may be used by churches who choose to conform to FASB standards for nonprofit financial reporting.

To read about these reports, and how report tags are used to generate them, see our articles:

Statement of Activities Report

Statement of Financial Position Report

Users can also create their own custom Tag Groups and Tags, which can then be applied to accounts to create custom reports.

For example:

You could use Report Tags to separate budgeted accounts from non-budgeted accounts on reports, or to create a distinct reports for committees responsible for particular subsets of your chart of accounts.

For more details, and how to set up your own custom Tag Groups and Tags, see our article:

Custom Report Tags

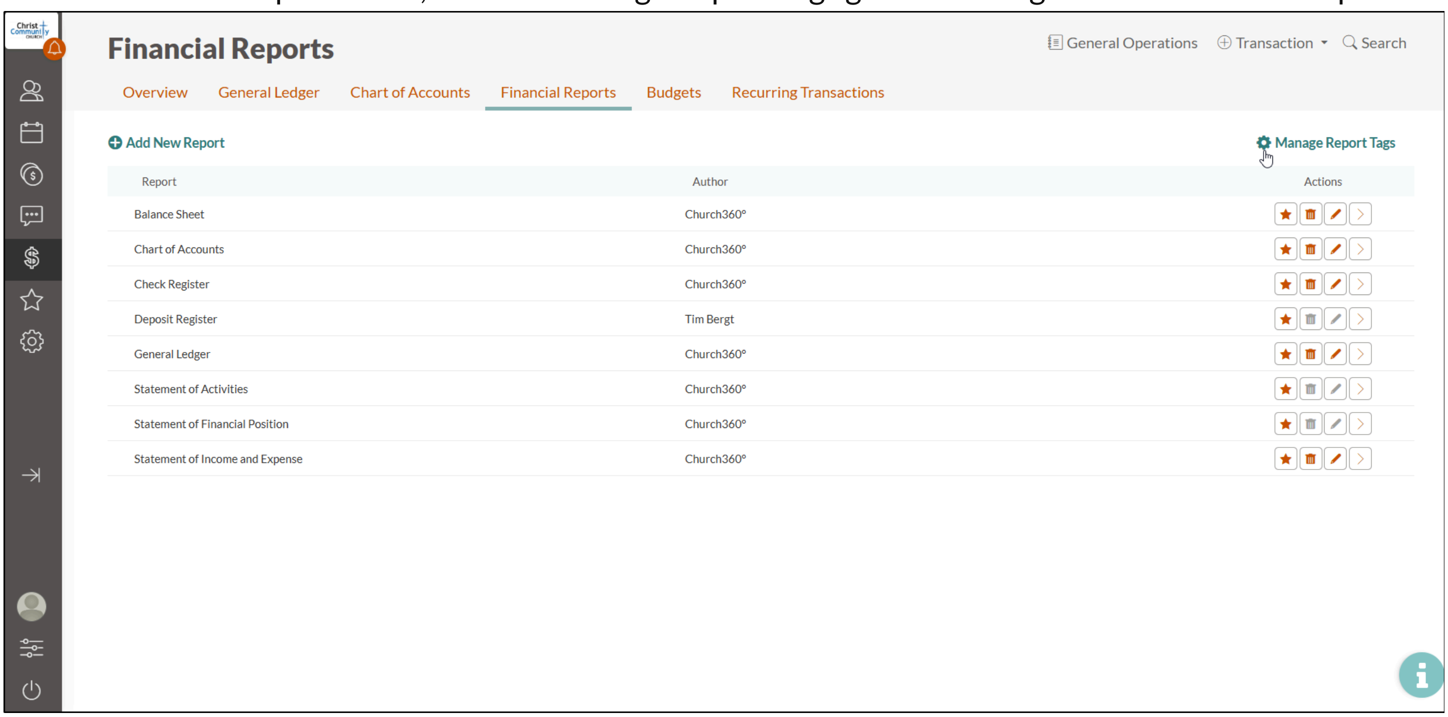
Custom Report Tags

In Church360° Ledger, Report Tags allow a user to categorize accounts for custom reporting.

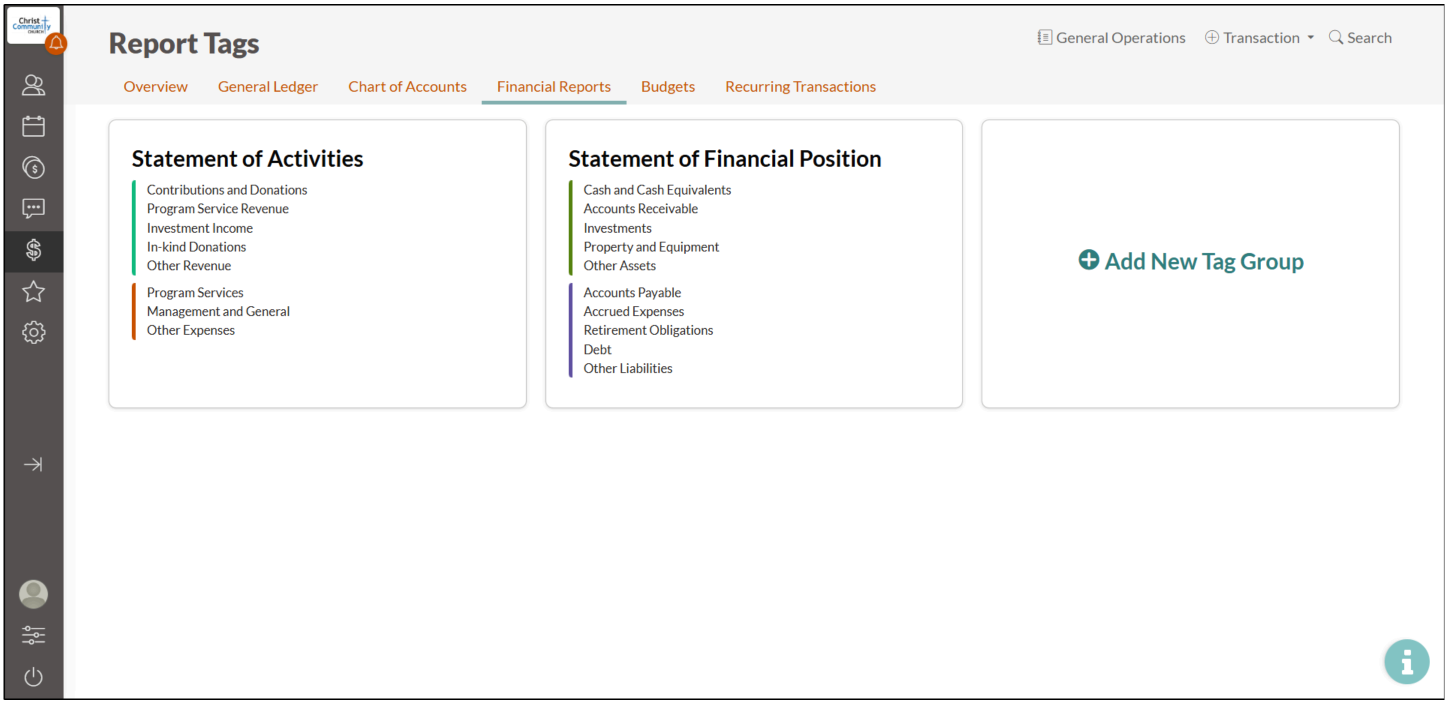
There are default tag groups provided by Church360°, and you can also create your own custom Tag Groups and Tags to allow you to create targeted custom reports. A Tag Group will allow you to create Tags to apply to a report.

To create your own custom Tag Group:

1. On the Financial Reports view, click the Manage Report Tags gear on the right above the list of reports.

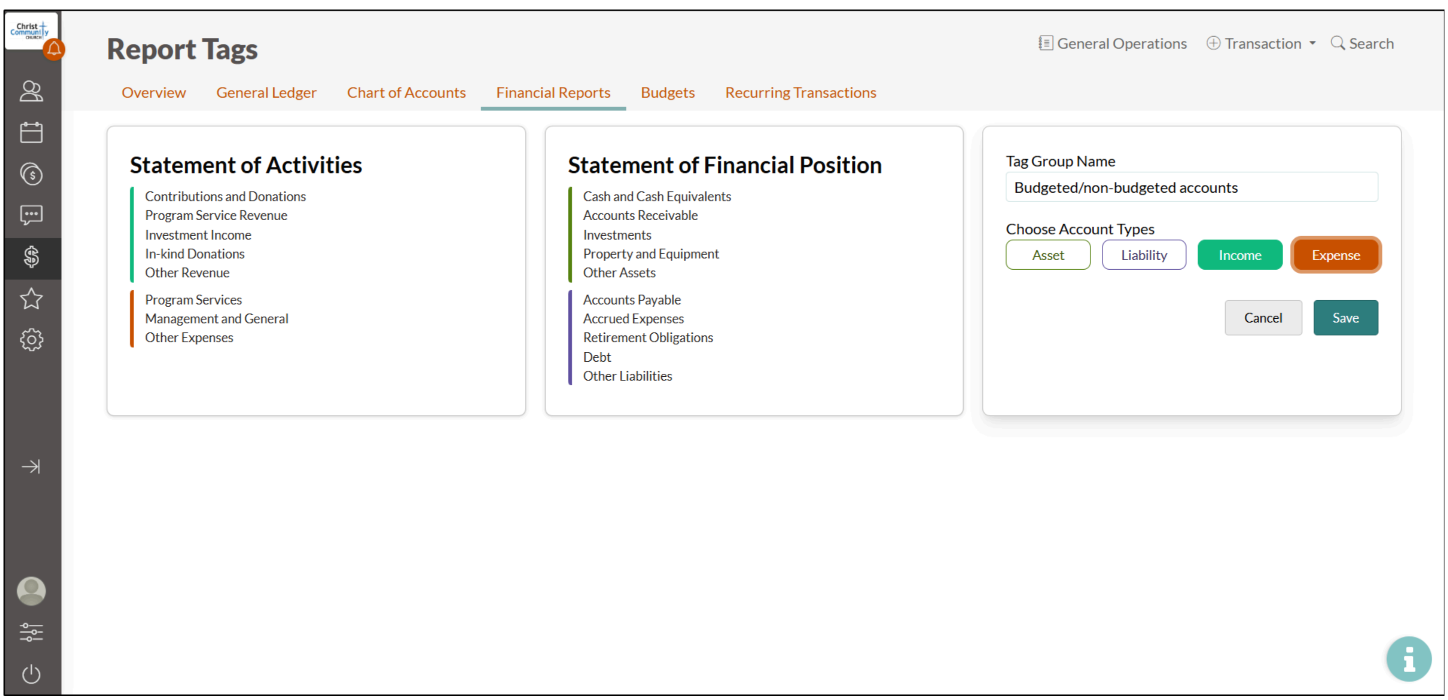


2. Then click Add New Tag Group.

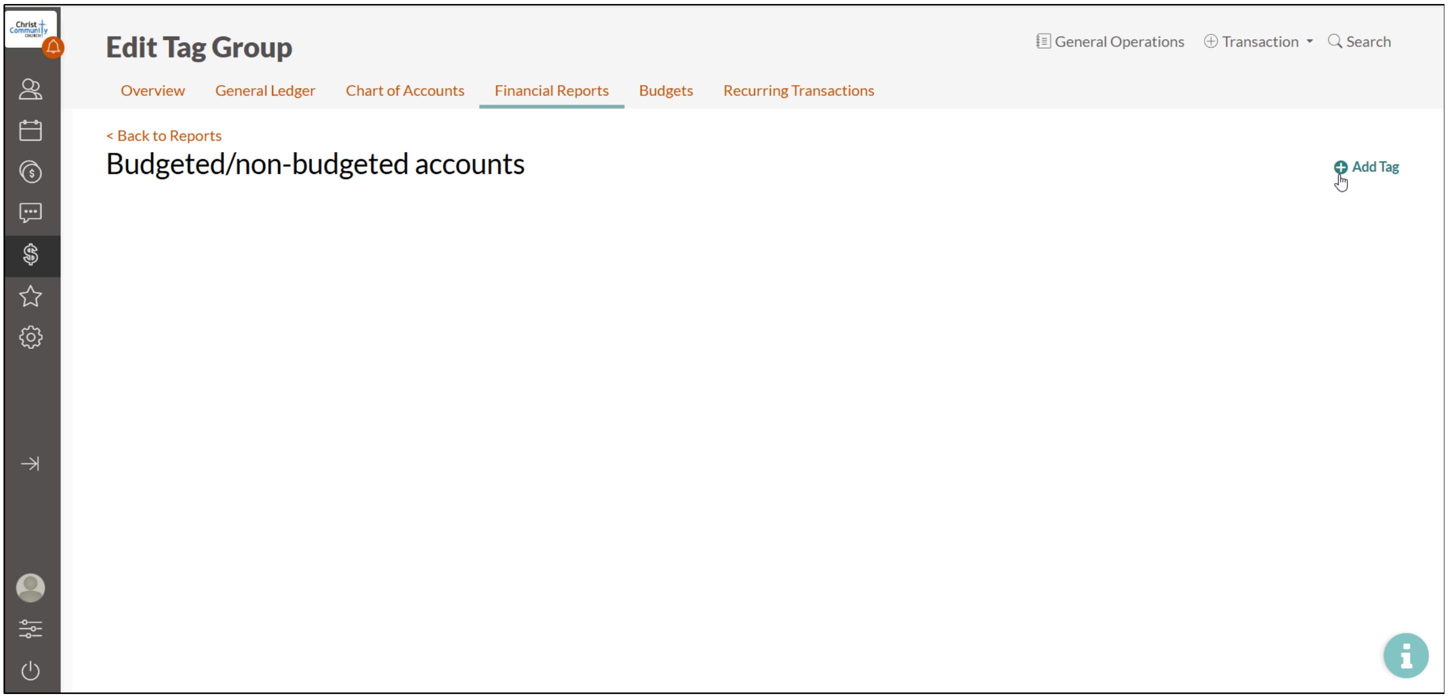


3. Type in a name for the Tag Group.

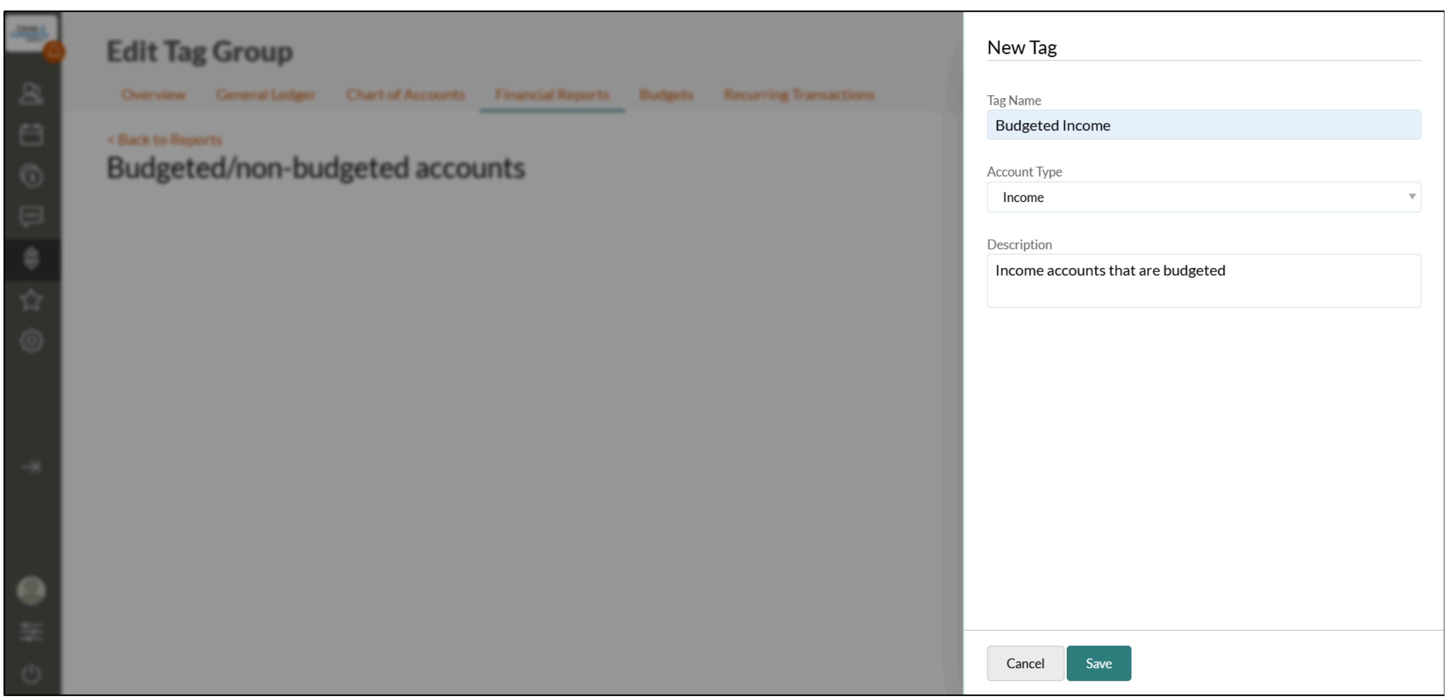
4. Then click the account types you would like to include in this group. For example, if this group is to allow you to show board certain accounts as budgeted vs non-budgeted, you won't need to include Assets or Liability.

5. 

6. This will open a new view with the name of your Tag Group.



Once you have a tag group created, you can add Tags to apply to the relevant accounts.

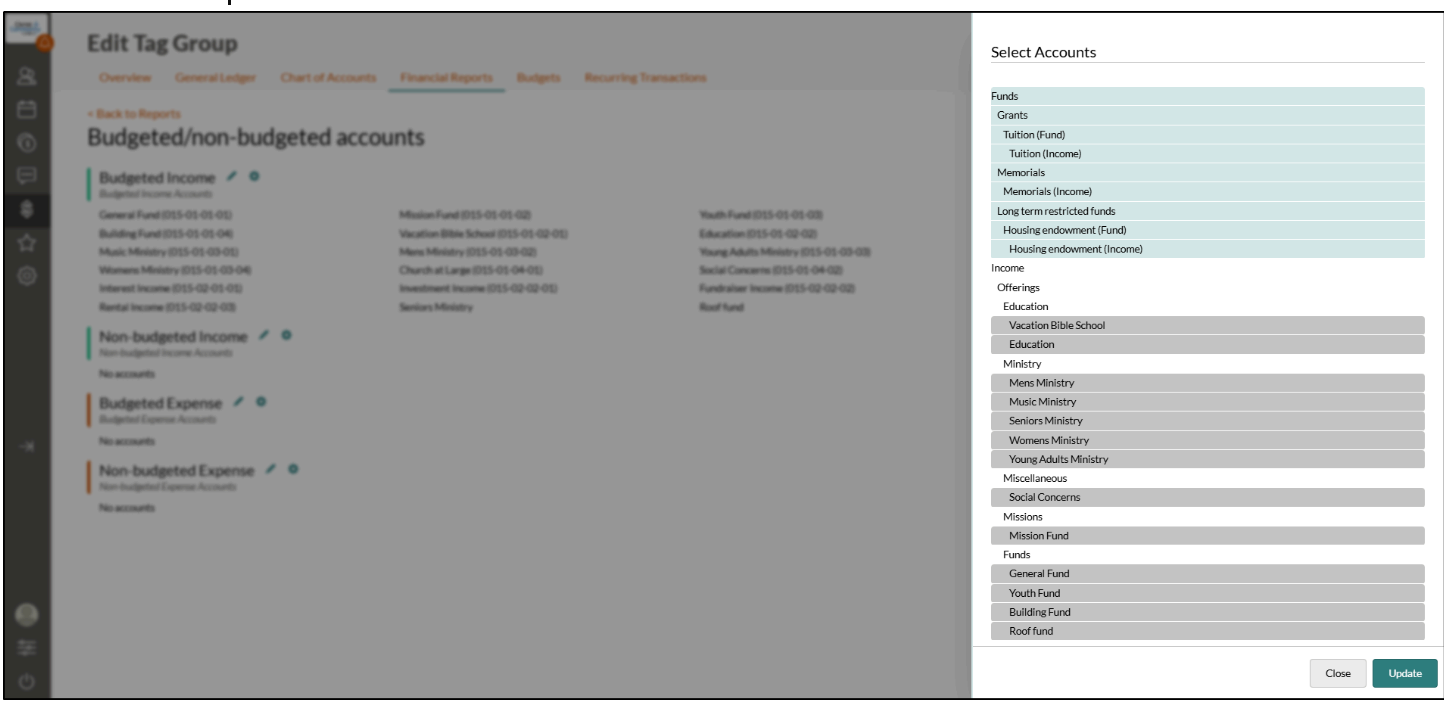
1. In the Edit Tag Group view, off to the right, click Add Tag.
2. A side bar will open where you can type in the name of the Tag. In the example mentioned above, it might be "Budgeted Income".
3. Then in the drop-down, select which account type this specific Tag will apply to, in this case, Income.
4. 

5. Click Save.

6. Repeat steps 1-5 to create the rest of the Tags for this group. In our example, those would be "Non-Budgeted Income", "Budgeted Expense", and "Non-Budgeted Expense".

Once all of your Tags have been created, you will see them listed in the new Tag Group view. Now you will want to tie the relevant accounts to each Tag:

1. Click the gear icon next to the name of the first Tag.
    - A side bar will appear on the right of your window listing all of the accounts of the type you selected for the Tag.
2. Click to select each account that belongs to the Tag in question. Click again to de-select any accounts that should not apply to the Tag. Note: Clicking a parent account will select or de-select all of the child accounts under it. If you want to select one but not another of the child accounts, click them individually.
3. Then click the Update button at the bottom of the list.



4. Click the gear icon on the next Tag you need to apply accounts to and repeat steps 5 & 6 above.
    - Accounts that were selected under a previous Tag will be highlighted, to avoid assigning an account to more than one Tag.
5. Continue until all of your accounts have been assigned to a Tag.

Now when creating a new report, or editing an existing report, you can click the arrow next to Tags in the left-hand side bar and select a Tag Group to generate the report according to the Tags you have set up.

TITLE

New Report

Save Report

This report can be seen by others

SECTION TITLE

New Section

FISCAL YEAR

CURRENT FISCAL YEAR

PERIOD

CURRENT MONTH

Tags

Use a tag group

Budgeted/non-budgeted accounts

Clear Tag Group

Filtering

Summary

	Nov 2024 Actual	Year-To-Date Actual
Budgeted Income		
Vacation Bible School	$0.00	$0.00
Education	$0.00	$0.00
Mens Ministry	$0.00	$50.00
Music Ministry	$0.00	$50.00
Seniors Ministry	$0.00	$0.00
Womens Ministry	$0.00	$45.00
Young Adults Ministry	$0.00	$0.00
Social Concerns	$0.00	$0.00
Mission Fund	$75.00	$800.00
General Fund	$795.00	$4,564.33
Youth Fund	$0.00	$25.00
Building Fund	$50.00	$150.00
Roof fund	$0.00	$0.00
Interest Income	$5.40	$16.20
Investment Income	$0.00	$0.00
Fundraiser Income	$0.00	$0.00
Rental Income	$0.00	$0.00
Church at Large	$0.00	$0.00
Budgeted Income	**$925.40**	**$5,700.53**
Non-budgeted Income		
Tuition (Income)	$0.00	$500.00
Memorials (Income)	$0.00	$310.00
Housing endowment (Income)	$0.00	$20.00

Add Column

- Budgets
- Actuals
- Credits
- Debits
- Starting Balance
- Ending Balance
- Percent
- Difference
- Ahead/Behind

Statement of Activities Report

Definition & Purpose:

The Statement of Activities shows the revenues and expenses of the Church and the changes to its net assets for the fiscal year. It is the equivalent of a for-profit income statement or profit & loss statement. Some churches that choose to comply with FASB nonprofit reporting standards use this report to show how a Church can afford their program and fundraising activities.

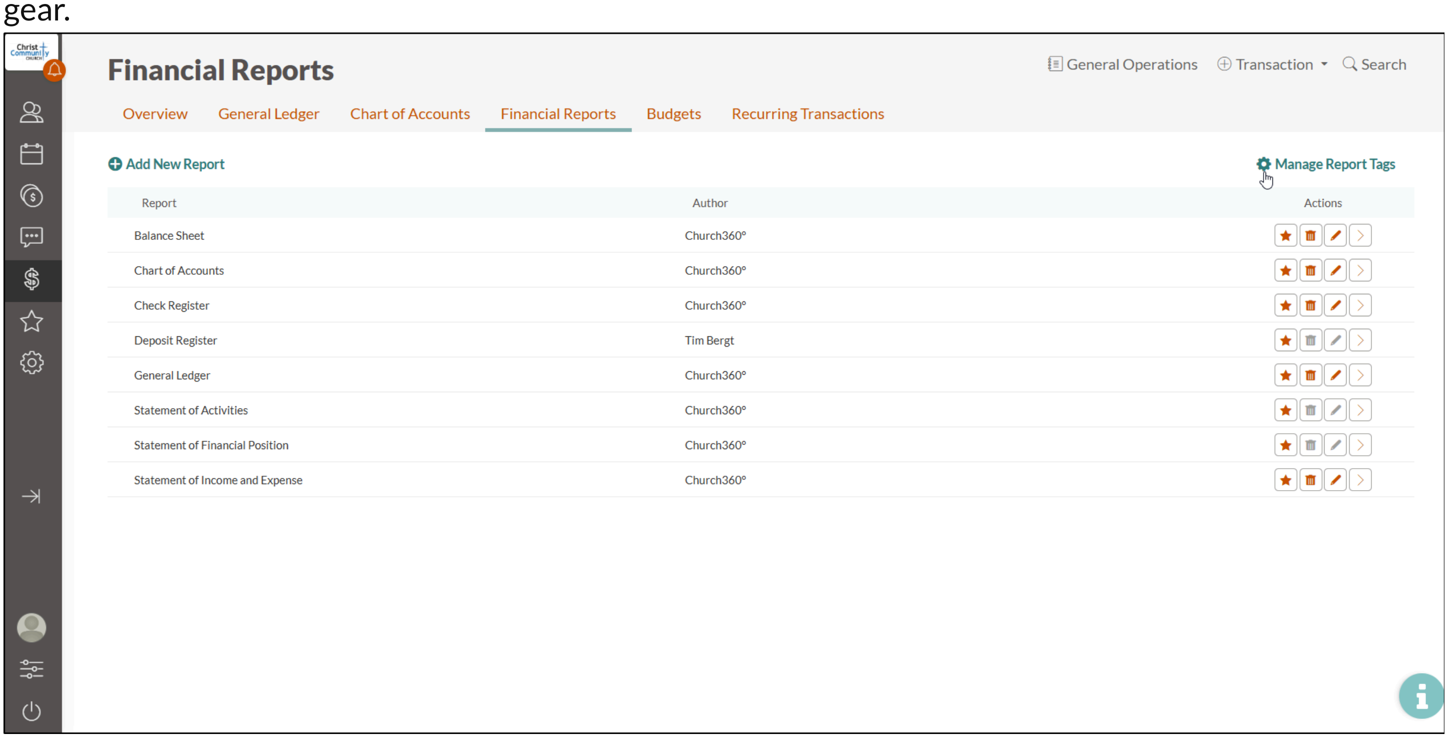
Structure:

The Statement of Activities must provide your Church's revenue and expenses, each broken into relevant categories, and the net assets calculated from them. This categorization is accomplished in Church360° Ledger using Tags, which must be assigned to all relevant accounts before generating the report.

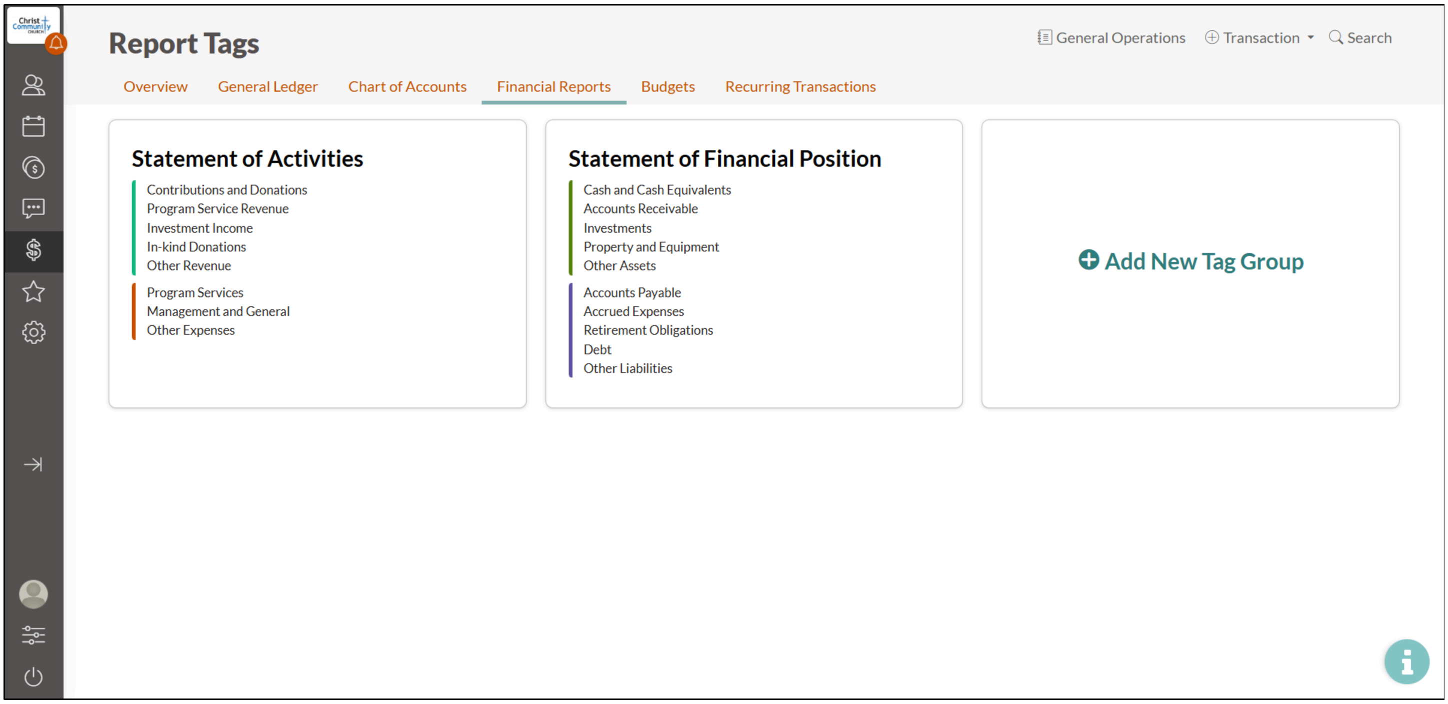
Tags:

Before using the Statement of Activities report you will need to assign each account to one of the Tags within the Tag Group to categorize it for the report. Below is the process to assign the Tags.

1. On the Financial Reports view, in the upper-right above the list of reports, click the Manage Report Tags gear.

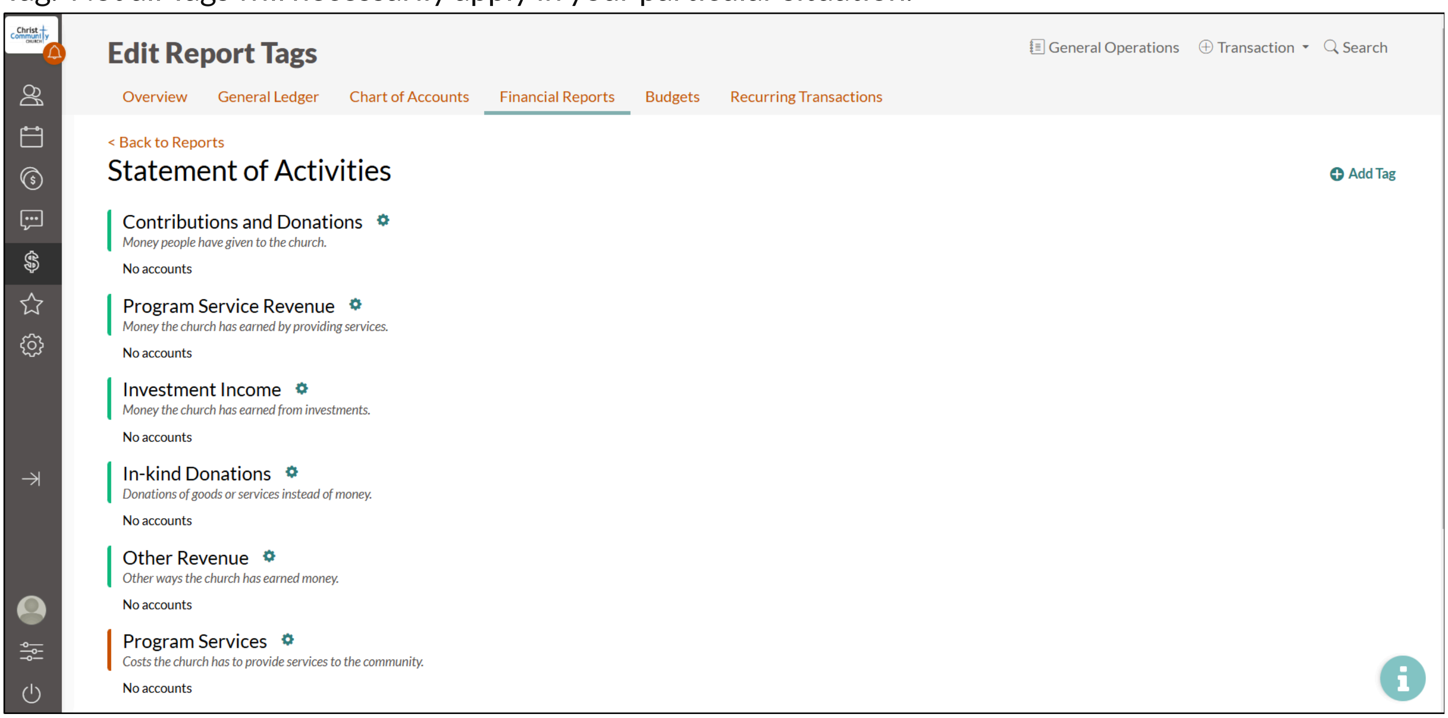


2. Click in the Statement of Activities Tag Group box.



3. You will see a list of all of the available categories for this report. These are the Tags.

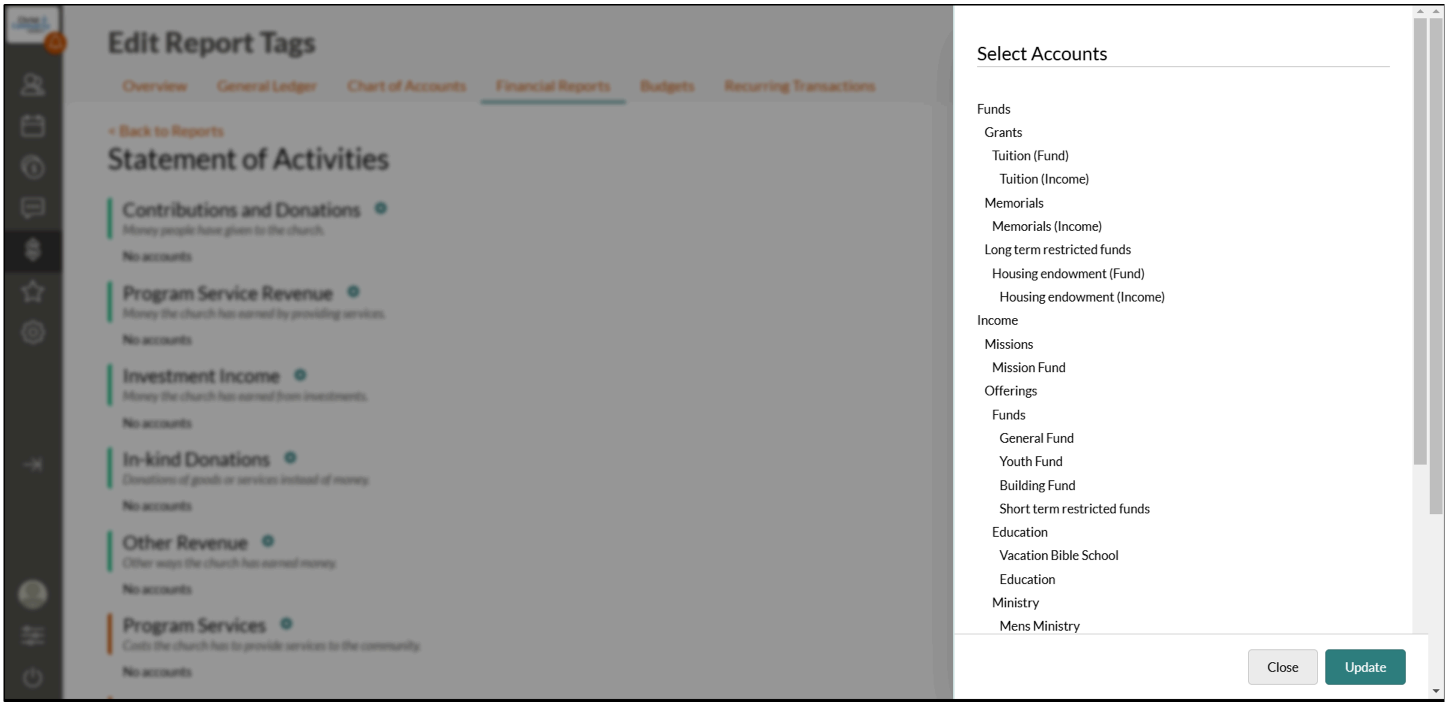
4. Each will have a one-line description to help you identify which, if any, of your accounts fall under this Tag. Not all Tags will necessarily apply in your particular situation.



5. Click the gear icon next to the name of a given Tag.

- A side bar will appear on the right of your window listing all of the accounts that are relevant to this report.

6. Click to select each account that belongs to the Tag in question. Click again to de-select any accounts that should not apply to the Tag. Note: Clicking a parent account will select or de-select all of the child accounts under it. If you want to select one but not another of the child accounts, click them individually.
7. Then click the Update button at the bottom of the list.



8. Then click the gear icon on the next Tag you need to apply accounts to and repeat steps 5 & 6 above.
   - Accounts that were selected under a previous Tag will be highlighted, to avoid assigning an account to more than one Tag.
9. Continue until all of your accounts have been assigned to a Tag.
10. If there are Tags that aren't relevant to any of your accounts, simply skip assigning anything to those Tags.

Report:

Once all of the accounts have been assigned a Tag, click back on Financial Reports at the top of the window, and click the > icon for the Statement of Activities report to generate the report and verify that everything was assigned correctly.

Note: This report is only intended for use at the end of the fiscal year, so you won't be able to generate it for the current fiscal year.

Statement of Financial Position Report

Definition & Purpose:

The Statement of Financial Position shows the assets and liabilities of the Church for the fiscal year. It reports on a Church's assets (what is owned) and liabilities (what is owed).

It is the equivalent of a balance sheet for a for-profit organization, and serves as a snapshot, providing a comprehensive picture of a Church's financial situation at a given time, comparing debt to equity or comparing current assets to current liabilities.

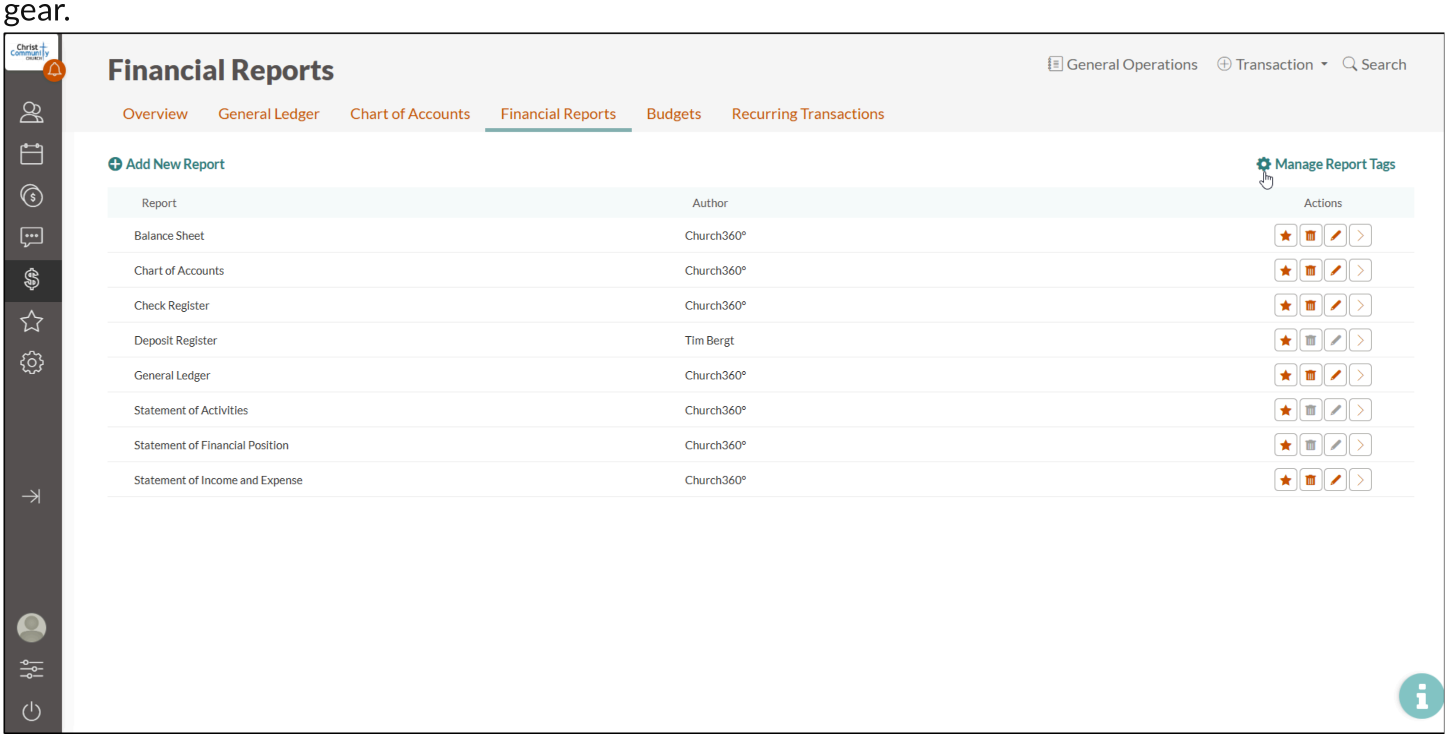
Structure:

The format of the statement of financial position follows the basic accounting equation, which states that assets equal the sum of all liabilities and equity.

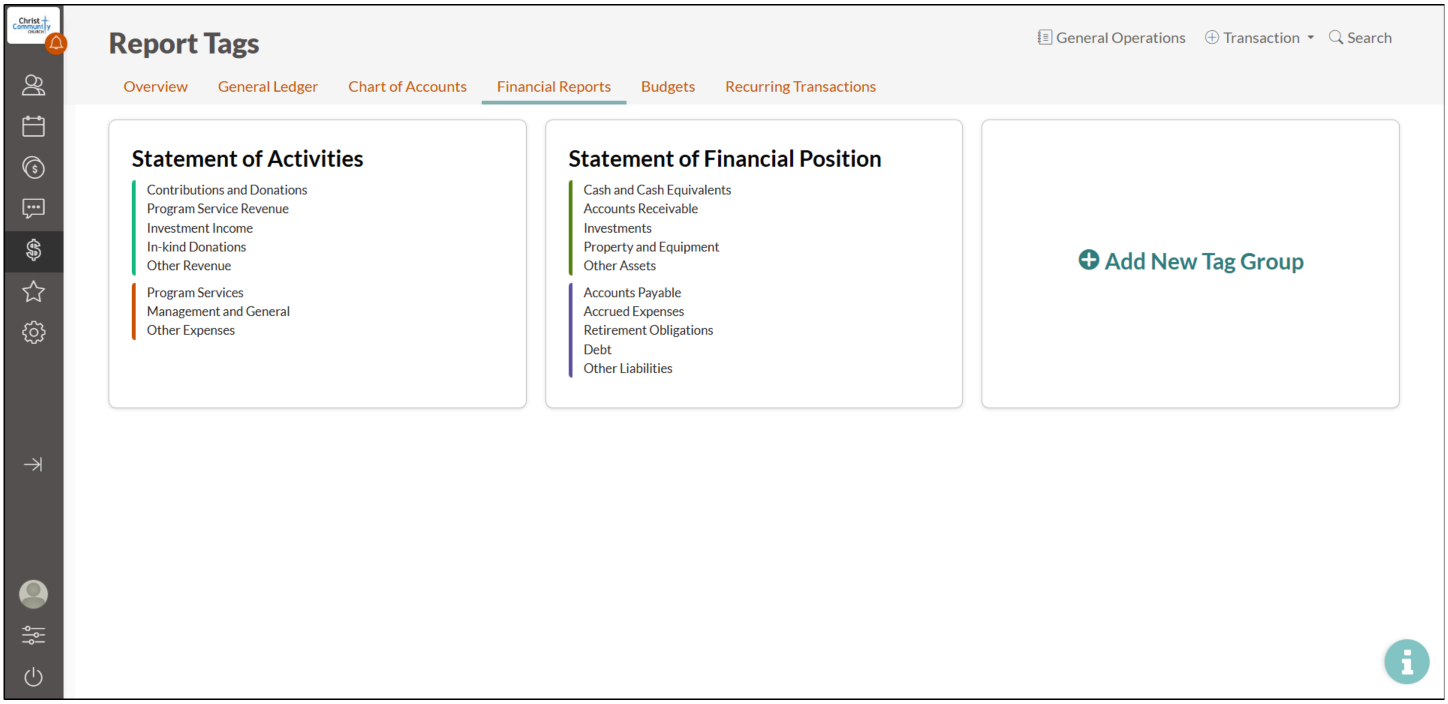
Tags:

Before using the Statement of Financial Position report you will need to assign each account to one of the Tags within the Tag Group to categorize it for the report. Below is the process to assign the Tags.

1. On the Financial Reports view, in the upper-right above the list of reports, click the Manage Report Tags gear.



2. Click in the Statement of Financial Position Tag Group box.

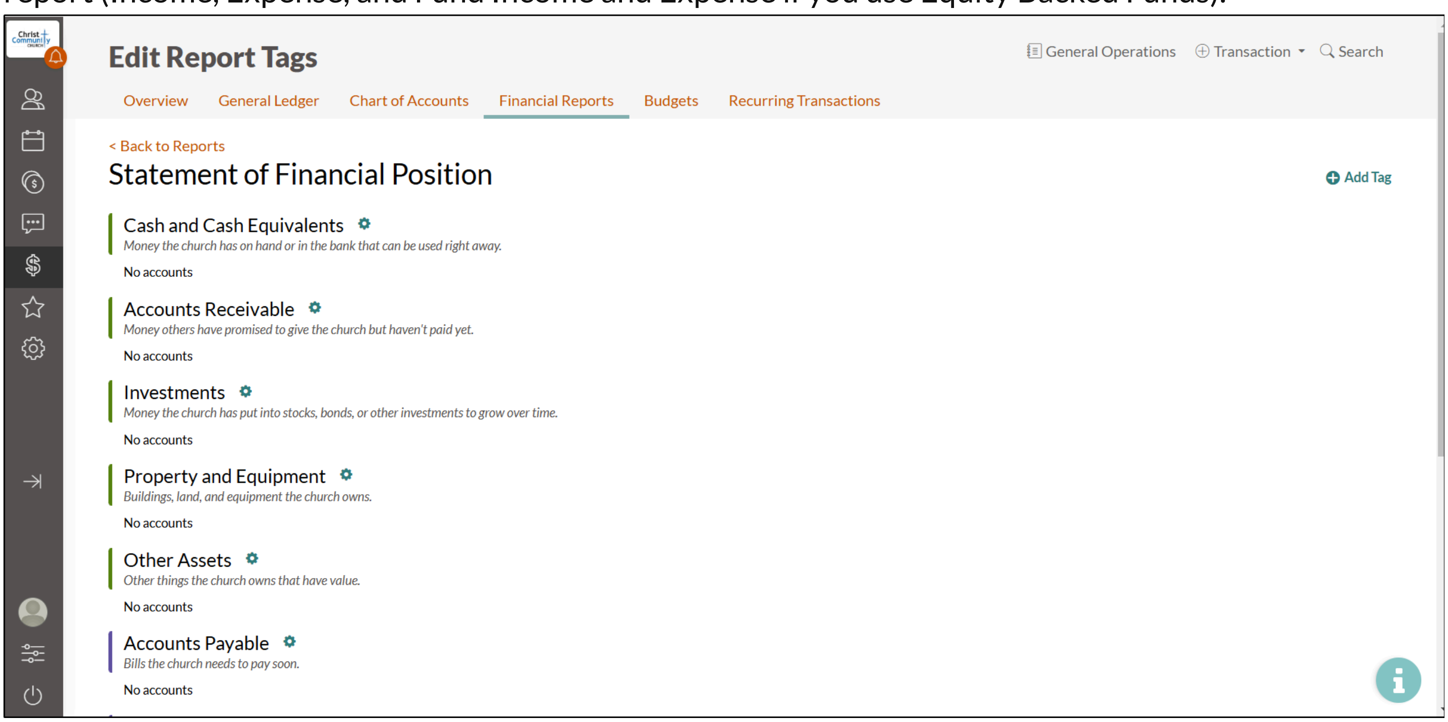


3. You will see a list of all of the available categories for this report. These are the Tags.

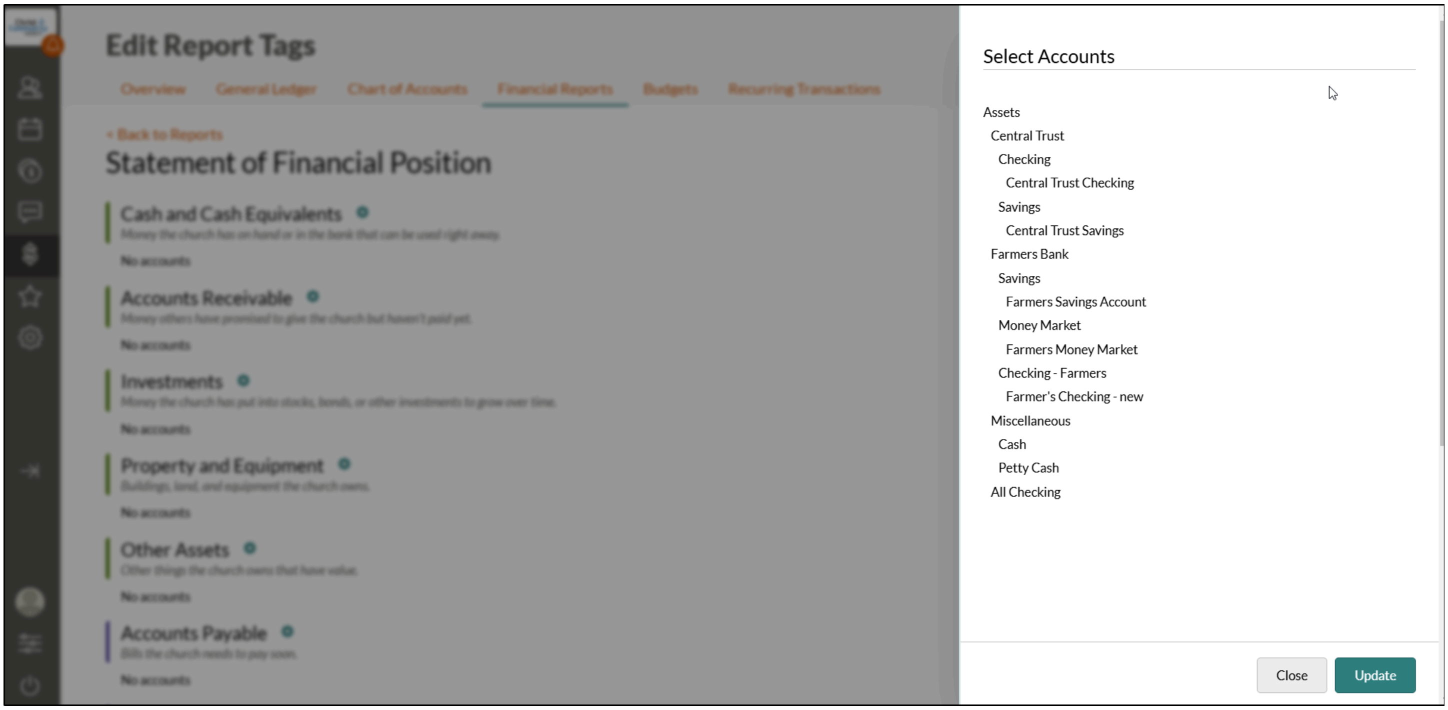
- Each will have a one-line description to help you identify which, if any, of your accounts fall under this category. Not all Tags will necessarily apply in your particular situation.

4. Click the gear icon next to the name of a given category.

5. A side bar will appear on the right of your window listing all of the accounts that are relevant to this report (Income, Expense, and Fund Income and Expense if you use Equity Backed Funds).



6. Click to select each account that belongs to the Tag in question. Click again to de-select any accounts that should not apply to the Tag. Note: Clicking a parent account will select or de-select all of the child accounts under it. If you want to select one but not another of the child accounts, click them individually.
7. Then click the Update button at the bottom of the list.



8. Then click the gear icon on the next Tag you need to apply accounts to and repeat steps 5 & 6 above.
    - Accounts that were selected under a previous Tag will be highlighted, to avoid assigning an account to more than one Tag.
9. Continue until all of your accounts have been assigned to a Tag.
10. If there are Tags that aren't relevant to any of your accounts, simply skip assigning anything to those Tags.

Report:

Once all of the accounts have been assigned a Tag, click back on Financial Reports at the top of the window, and click the > icon for the Statement of Activities report to generate the report and verify that everything was assigned correctly before generating your report.

Note: This report is only intended for use at the end of the fiscal year, so you won't be able to generate it for the current fiscal year.

Printing a Reconciliation Report

If you need to print off a list of transactions from a previous reconciliation, you can do so by opening the account's details to view or print that information.

To print or export a posted reconciliation report,

1. Go into Ledger from the Navigation bar.
2. Click the Chart of Accounts tab to view all of your current accounts.
3. Find an eligible account and click the arrow to the far right of the account name.
4. Under Account Details, click the "Reconciliation" tab to view previous reconciliations.
5. Clicking on the Arrow action button next to an entry will show the past reconciliation listing, where you can then print or export for your records.