



# Church360° Members

## Offerings

## Navigating the Offerings View

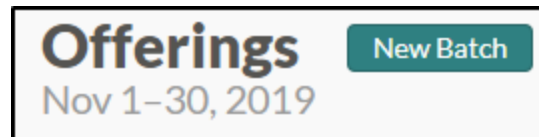
The Offerings view allows users to quickly enter and access offering details and summaries by either giver or fund.

### Date Range Selector

If you are looking for offering details or summaries for a specific date range, users can click on the date range below the Offerings heading or use the slider on the graph to edit it as needed.

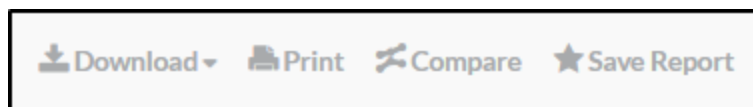
To avoid large amounts of data creating lagging, date ranges are limited to 18 months.

To the right of the Offerings heading, there is a button labelled "New Batch" that takes users to the batch entry screen for offerings.



### Action Buttons

- Download - On the Offerings view, you can export offering information to a spreadsheet, either in Excel or CSV format. Downloads will specifically filter based on what data is visible.
- Print - This option allows you to print your list of visible records and information directly from your browser.
- Compare - This option will open the selected date range as an attendance and contribution comparison between multiple years.
- Save Report - This option allows you to save the columns and layout of your current view. You can access your saved reports at any time by clicking on the Reports page in the Primary Navigation bar.



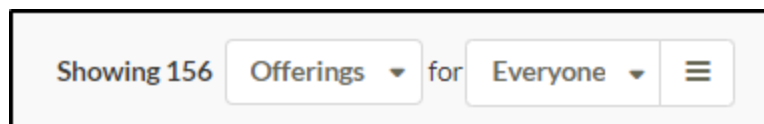
### Drop-Down Menus

On the right of the view, who and what type of information is shown under the Offering details can be filtered by two drop-down menus.

The first drop-down menu houses three options for the Offerings view.

- Offerings - This option shows each individual offering made within the selected date range. Hovering over an offering record will highlight all other offerings that share the same batch, allowing users to reopen and edit existing batches.
  - An offering's Name/Envelope, Fund, or Type can be clicked on to apply a filter for the view.
- Summaries by Fund - This option shows a summary of each fund with offerings within the selected date range, including information on the average gift range, total amount given in the date range, total amount pledged in the date range, and pledge statistics. Clicking a column header will sort the list by that field.
- Summaries by Giver - This option shows a summary of each giver with offerings within the selected date range, including information on the average gift range, total amount given in the date range, total amount pledged in the date range, and pledge statistics. Additional columns of data can be selected from the Columns drop-down menu. Clicking a column header will sort the list by that field.

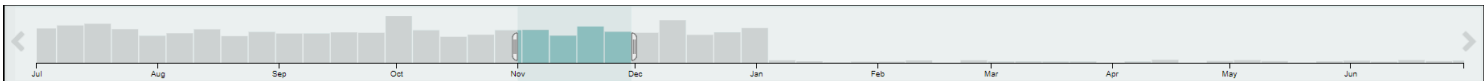
The second drop-down will contain a list of all Smart Groups (denoted with a lightbulb icon) and Tags (denoted with a tag icon) that you can select to automatically filter your view. On the right of this menu is a button with three lines on it. This will open up the Smart Group Trait drawer to access specific criteria to filter your view.



## Overview Graph and Offering details

Once your date range and data filters are selected, the graph at top of the visible data shows an overview of your offerings.

Information displayed is dependent on the option chosen from the first drop-down menu.

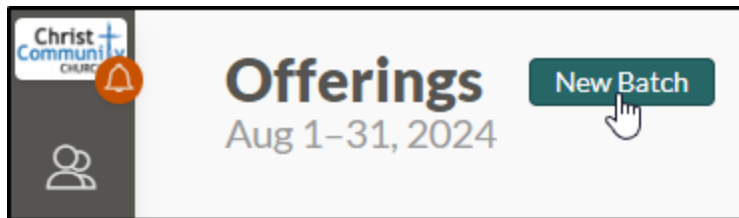


Date	Event	Name / Envelope	Fund	Amount	Type	Check #	Total
Nov 24, 2019	none	David and Susanne Abbott (101)	General Fund	\$315.00	Cash		\$315.00
Nov 24, 2019	none	Troy and Kira Belton	Young Adults Ministry	\$40.00	Cash		\$40.00
Nov 24, 2019	none	Julie Billings	Womens Ministry	\$90.00	Check	352	\$90.00
Nov 24, 2019	none	Andre and Tanya Martin (138)	General Fund	\$200.00	Cash		\$200.00
Nov 24, 2019	none	Charles and Katherine Martin (137)	Mens Ministry	\$245.00	Cash		\$245.00
Nov 24, 2019	none	James and Vanessa Meier (140)	Mission Fund	\$150.00	Cash		\$150.00
Nov 24, 2019	none	Walter and Mable Moore	Music Ministry	\$90.00	Cash		\$90.00
Nov 24, 2019	none	Ruth Morgan (143)	General Fund	\$65.00	Cash		\$65.00
Nov 24, 2019	none	Jeffrey and Michelle Morrison (104)	General Fund	\$255.00	Electronic		\$255.00
Nov 24, 2019	none	Robert Callaway (107)	Building Fund	\$190.00	Electronic		\$190.00
Nov 24, 2019	none	Carmen Carroll (108)	Vacation Bible School	\$50.00	Electronic		\$50.00
Nov 24, 2019	none	Jason Freeman (119)	Education	\$25.00	Cash		\$25.00
Nov 24, 2019	none	Jonathan and Melissa Gibson (120)	Church at Large	\$200.00	Cash		\$200.00
Nov 24, 2019	none	Edgar and Anita Gomez (121)	General Fund	\$410.00	Cash		\$410.00
Nov 24, 2019	none	Brenda Gregory (123)	General Fund	\$115.00	Electronic		\$115.00

## Entering Offerings

Users can record all offerings given on a single date or event in a single batch.




























1. Go into Offerings from the Navigation bar.
2. On the Offerings view, click the “New Batch” button at the top of the page.



3. Select the date (and event, if applicable) for the batch and click "Add".

A screenshot of a 'New Batch' modal window. The title bar says 'New Batch' with a close button (X) on the right. The form contains a 'Date' field with 'Aug 18, 2024' entered. Below it is an 'Event' section with two radio button options: 'No event' and 'Contemporary Worship'. The 'Contemporary Worship' option is selected, and a mouse cursor is pointing at it. At the bottom right of the modal are two buttons: 'Cancel' and 'Add'.

4. For each offering, record the giver's name (or envelope number), payment type, check number (if applicable), fund, amount, and memo. Press the Enter or Return key to save the row and update the batch's total. Once an offering is saved, it is recorded to the giver's record and the Offerings view.

Name / Envelope	Payment Type	Check #	Fund	Amount	Memo	Total
Loose Offerings	  		General Fund	\$153.36	-	\$153.36
David and Shirley Alexander (172)	  		Mens Ministry	\$50.00	-	\$50.00
Robert Callaway (107)	  		Young Adults Ministry	\$20.00	-	\$20.00
Emilia Gomez	  		Womens Ministry	\$25.00	-	\$25.00
Stanley and Theresa Cook (113)	  		Social Concerns	\$100.00	-	\$100.00
Patricia McGuire	  		General Fund	\$60.00	-	\$60.00
Karen Porter (159)	  		Music Ministry	\$55.00	-	\$55.00
Elizabeth Vazquez	  		Youth Fund	\$99.87	-	\$99.87
Luis Ortiz	  		Church at Large (11)	35	Enter a memo	<i>Press Enter to add this offering</i>

5. If the site uses the Ledger module for financial reporting, users can click on "Post to Ledger" once the batch has been entered and verified to create a pending deposit in the Ledger module. This can only be done once. Any edits or additions will need to be made manually in both Offerings and Ledger.

**Aug 18, 2024** > **\$563.23**

Contemporary Worship

Edit Post to Ledger

Note: The "Post to Ledger" button will only appear for churches that use the Ledger module.

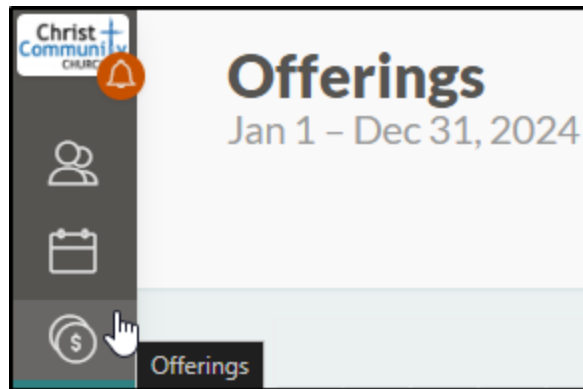
Note: Posting to Ledger refers to creating a pending deposit in the Ledger module of Church360° from an offering batch, and is not required for an offering to be recorded and saved. This process is done only once; if an offering batch is edited after posting to Ledger, the corresponding deposit will need to be manually corrected as well.

## Editing Offerings

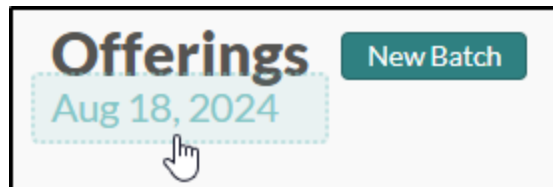
Once an offering batch has been entered, users can reopen the batch to make edits or additions as needed.

To reopen and edit an offering batch,

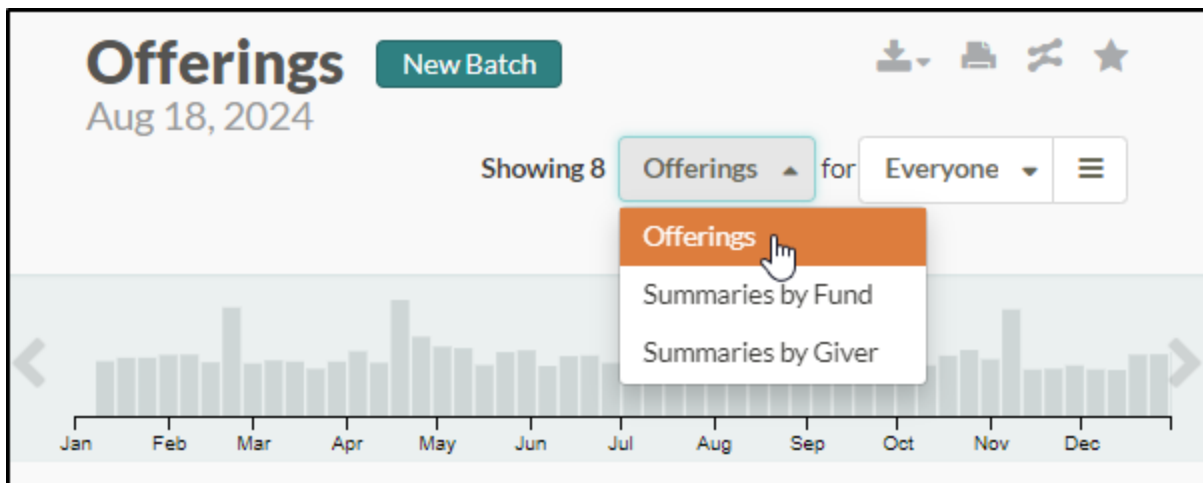
1. Go into Offerings from the Navigation bar.



2. Using either the date range under the Offerings title or by selecting parts of the bar graph, choose a date range that includes the batch in question.



3. Make sure the view is showing the detailed Offerings, not just summaries by using the first drop-down menu to the right of the screen.



4. Hover over some of the offerings in the batch you want to edit. They will be highlighted in a faded orange color to signify all of the offerings within the batch. Click somewhere in the blank area to the left to reopen the batch for editing.

Date	Event	Name / Envelope	Fund	Amount	Type	Check #	Total
Aug 18, 2024	Contemporary Worship	Loose Offerings	General Fund	\$153.36	Cash		\$153.36
Aug 18, 2024	Contemporary Worship	David and Shirley Alexander (172)	Mens Ministry	\$50.00	Check		\$50.00
Aug 18, 2024	Contemporary Worship	Robert Callaway (107)	Young Adults Ministry	\$20.00	Cash		\$20.00
Aug 18, 2024	Contemporary Worship	Emilia Gomez	Womens Ministry	\$25.00	Cash		\$25.00
Aug 18, 2024	Contemporary Worship	Stanley and Theresa Cook (113)	Social Concerns	\$100.00	Cash		\$100.00
Aug 18, 2024	Contemporary Worship	Patricia McGuire	General Fund	\$60.00	Check		\$60.00
Aug 18, 2024	Contemporary Worship	Karen Porter (159)	Music Ministry	\$55.00	Cash		\$55.00
Aug 18, 2024	Contemporary Worship	Elizabeth Vazquez	Youth Fund	\$99.87	Electronic		\$99.87

5. Make any edits as needed. Users can add additional offerings, or edit or delete existing entries.

- To edit an offering, click the row and make adjustments as needed. Click "Save" to save those changes.
- To edit the date or event for an offering batch, click the "Edit" button at the top of the offering batch.
- To delete a single offering from a batch, click the minus sign to the far right of the row and click "Delete".
- To delete the entire batch, scroll down to the bottom of the page and click "Delete this batch".

Note: Offerings imported from Vanco cannot be edited and must be changed on the Vanco side.

Note: Offering batches can only be posted to Ledger once. Any changes to the offering batch after posting will need to be done to its corresponding deposit in Ledger.

Aug 18, 2024 > \$583.23

Edit Post to Ledger

Download Print

Contemporary Worship

Name / Envelope	Payment Type	Check #	Fund	Amount	Memo	Total	
Loose Offerings			General Fund	\$153.36	—	\$153.36	⊖
David and Shirley Alexander (172)			Mens Ministry	\$50.00	—	\$50.00	⊖
Robert Callaway (107)			Young Adults Ministry	\$20.00	—	\$20.00	⊖
Emilia Gomez			Womens Ministry (10)	45	Enter a memo	\$25.00	Save ✕
			Young Adults Ministry (9)				
Stanley and Theresa Cook (113)			Social Concerns	\$100.00	—	\$100.00	⊖
Patricia McGuire			General Fund	\$60.00	—	\$60.00	⊖
Karen Porter (159)			Music Ministry	\$55.00	—	\$55.00	⊖
Elizabeth Vazquez			Youth Fund	\$99.87	—	\$99.87	⊖
Loose Offerings			Womens Ministry (10)		Enter a memo		

# Printing an Offering Batch

Once an offering batch has been entered (and posted to Ledger if applicable), the batch itself can be printed or exported for church records.

To print or export an offering batch,

1. Add or reopen a batch that needs printing or exporting.
  2. At the upper right of the view, there are two action buttons for printing and downloading.
- Click "Print" to open a print preview of the batch. In the top-right corner of the preview window, there is a button to switch between portrait and landscape printing that can show memos if needed. To print from the browser, press CTRL+P or right-click the page and choose "Print".
  - Click "Download" to export the batch to a CSV or Excel file. Users can open a spreadsheet program to edit or print the spreadsheet format.

**Jun 9, 2024 > \$280.00** Edit Download Print

(No event)

Name / Envelope	Payment Type	Check #	Fund	Amount	Memo	Total
Loose Offerings			General Fund	\$135.00	-	\$135.00
Brandon Carter			Music Ministry	\$15.00	-	\$15.00
Tiffany Cook			Womens Ministry	\$30.00	-	\$30.00
Arlene Dowling (116)			Mens Ministry	\$25.00	-	\$25.00
Judith Hobson (128)			Building Fund	\$25.00	-	\$25.00
David and Cynthia Overton (148)			Social Concerns	\$50.00	-	\$50.00

Loose Offerings Social Concerns (12)  Enter a memo

	Cash	Check	Electronic	In-Kind	Total
<b>Total</b>	\$280.00	\$0.00	\$0.00	\$0.00	<b>\$280.00</b>
General Fund	\$135.00	\$0.00	\$0.00	\$0.00	\$135.00
Building Fund	\$25.00	\$0.00	\$0.00	\$0.00	\$25.00
Music Ministry	\$15.00	\$0.00	\$0.00	\$0.00	\$15.00
Mens Ministry	\$25.00	\$0.00	\$0.00	\$0.00	\$25.00
Womens Ministry	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00
Social Concerns	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00

Delete this batch i



# Jun 9, 2024 > \$280.00

(No event)

Name / Envelope	Payment Type	Check #	Fund	Amount Memo	Total
Loose Offerings	Cash		General Fund	\$135.00 —	\$135.00
Brandon Carter	Cash		Music Ministry	\$15.00 —	\$15.00
Tiffany Cook	Cash		Womens Ministry	\$30.00 —	\$30.00
Arlene Dowling (116)	Cash		Mens Ministry	\$25.00 —	\$25.00
Judith Hobson (128)	Cash		Building Fund	\$25.00 —	\$25.00
David and Cynthia Overt...	Cash		Social Concerns	\$50.00 —	\$50.00

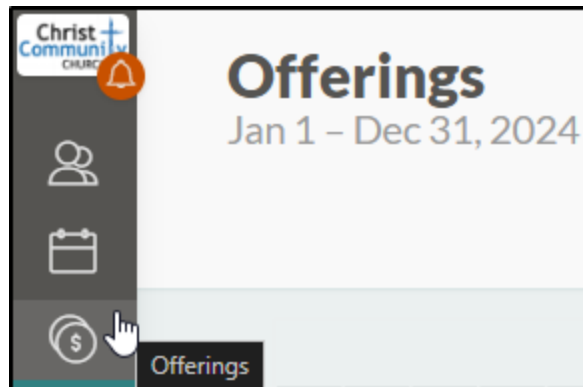
	Cash	Check	Electronic	In-Kind	Total
<b>Total</b>	\$280.00	\$0.00	\$0.00	\$0.00	<b>\$280.00</b>
<b>General Fund</b>	\$135.00	\$0.00	\$0.00	\$0.00	<b>\$135.00</b>
<b>Building Fund</b>	\$25.00	\$0.00	\$0.00	\$0.00	<b>\$25.00</b>
<b>Music Ministry</b>	\$15.00	\$0.00	\$0.00	\$0.00	<b>\$15.00</b>
<b>Mens Ministry</b>	\$25.00	\$0.00	\$0.00	\$0.00	<b>\$25.00</b>
<b>Womens Ministry</b>	\$30.00	\$0.00	\$0.00	\$0.00	<b>\$30.00</b>
<b>Social Concerns</b>	\$50.00	\$0.00	\$0.00	\$0.00	<b>\$50.00</b>

## Printing or Exporting the Offerings view to CSV or Excel

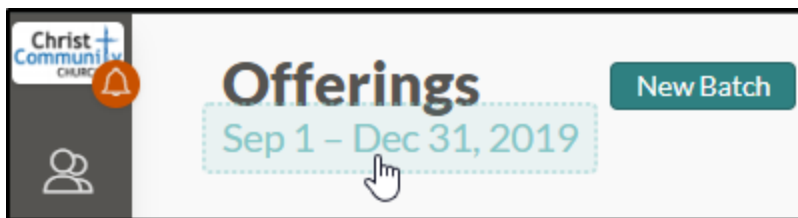
The Offerings view holds many different customization options like an interactive report. The view can then be printed or exported to a spreadsheet file for more analysis.

To print or export the Offerings view,

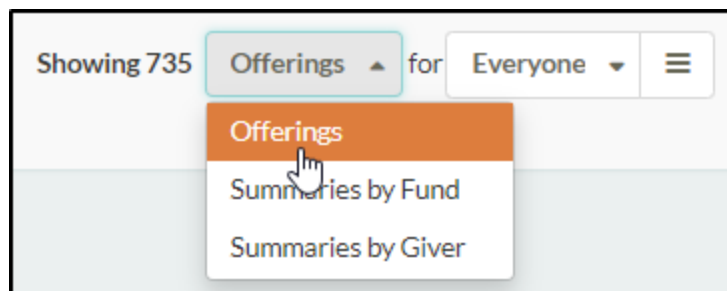
1. Go into Offerings from the Navigation bar.



2. Using either the date range under the Offerings title or by selecting parts of the bar graph, choose a desired date range. To avoid system lagging, date ranges for the Offerings view is limited to 18 months.



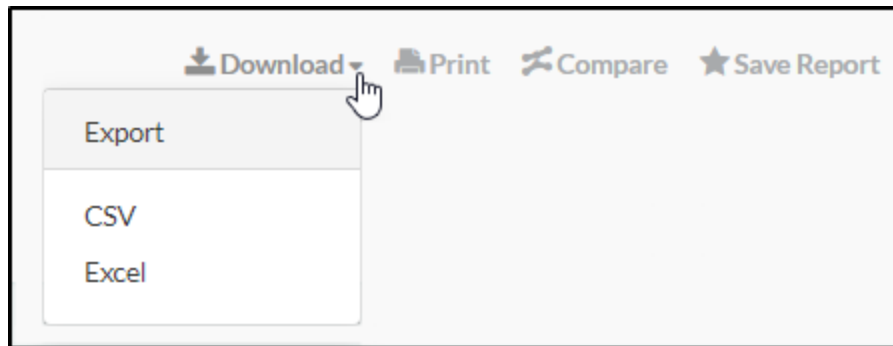
3. Use the first drop-down menu to the right to select whether to show individual Offerings, Summaries by Fund, or Summaries by Giver.



4. Use the second drop-down menu or Smart Group traits to show what givers to include in the view.

5. Once the data looks accurate, go to the upper right of the view, there are action buttons for printing and downloading.

- Click "Print" to open a print preview of the view. To print from the browser, press CTRL+P or right-click the page and choose "Print".
- Click "Download" to export the batch to a CSV or Excel file. Users can open a spreadsheet program to edit or print the spreadsheet format.



## Understanding Vanco Offering Dates

When looking at the Offering view, you may notice that some offerings display two dates. The difference between the two dates relates to the difference between when an offering is initially received by Vanco and when the offering is received by a church's bank.

For Vanco offerings, there are two dates that we take into consideration:

- **Given Date** - This is when the money is recognized as having officially left the giver's control and has been received by Vanco. In Vanco, this date is called the settlement date.
- **Batch Date**—This is the date the offering was deposited into your church's bank account. It may also be called the deposit date on Vanco reports.

After receiving much feedback from customers encouraging us to bring in the Batch date along with the given date, CTS has implemented a new import process with Vanco that allows both dates to be displayed.

When looking at a Vanco offering on the detailed Offering view, the batch date is displayed along with the given date in parentheses.

Date
Dec 1, 2023 (given Nov 29, 2023)

### Grouping

To better handle financial reconciliations, offerings are grouped into batches by batch date and sub-divided by giving method, if their Vanco encryption key is entered in [Vanco Integration](#). This may cause batch dates to have up to three batches on a particular day.

This allows Church360° Members to better organize offerings, before sending them as a batch to Church360° Ledger as a pending deposit. Batches also show account fees paid to Vanco by the giver separately within their batch calculations.

### Sorting

The detailed Offering view is sorted based on a hierarchy of levels:

- If your site does not use a Vanco encryption key,
  - Offerings are sorted by batch date (which, for manually entered offerings, this date is considered the same as the given date)
  - Offerings are then sorted by Created At date
- If your site does use a Vanco encryption key,
  - Offerings are first sorted by batch date (when it was deposited into the church's bank account)
  - Offerings are then sorted by given date (when the donation settles with Vanco)
  - Offerings are then sorted by Created At date

## **Filtering**

For other reporting based on giving status, the Offering view's date range filters based on the given date and shows the total given by the donor, including fees. This is to help with annual giving reports like fund summaries and contribution statements.

## Navigating the Envelopes view

Though it is not required to have an envelope number for users to add offerings to a person or couple and generate contribution statements for them, many churches still use a physical envelope system in some format.

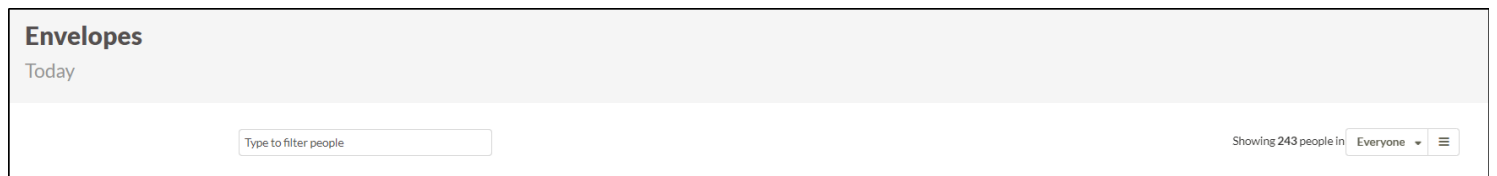
For those situations, users can add, edit, remove, and reorganize envelope numbers for their congregations from the Envelopes view.

### Search Bar

Users can use the search bar to filter the list of visible giving units. Any renumbering actions will be applied only to the envelopes currently visible.

### Drop-Down Menu

On the right of the view, giving units can also be filtered by the available drop-down menu. Any renumbering actions will be applied only to the envelopes currently visible.



### Fields and Actions for Envelopes

- Name - Displays the name of the giving unit.
- Spouse - Displays the name of the spouse of the giving unit. If spouses are giving separately, they will have their own row for an envelope number. Users can add a spouse to this field to create a marriage relationship between the two records from this view.
- Contributes Jointly - If a couple is married, they have the option to contribute offerings jointly and share an envelope number. If this box is checked, both spouses will be on a single line. Users can mark a married couple as giving jointly from this view.
- Current Envelope - Displays the envelope number currently being used in the system for the giving unit, if applicable.

- Don't Renumber - If a giving unit wants to retain a certain number or remain blank, users can check this box to "lock in" whatever is currently in the "Next Envelope" field so that it cannot be edited.
- Next Envelope - Users will use this field to enter in any changes to a giving unit.
  - To add an envelope number, enter a new, unused number into the "Next Envelope" field.
  - To edit an envelope number, clear the number currently in the "Next Envelope" field and enter in a new, unused number.
  - To remove an envelope number, clear out the number currently in the "Next Envelope" field and leave it blank. If you want this giver to remain without a number, it's recommended to check the "Don't Renumber" box to "lock in" the blank status.
- Scheduled Envelope - If an edit or renumbering has been scheduled instead of applied immediately, an additional column will appear to show the scheduled change.

Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
Charles Hobson	<input type="text" value="Add a spouse"/>		–	<input type="checkbox"/>	<input type="text" value="127"/> • <span style="background-color: #ffe0b2; padding: 2px;">Envelope #127 is already assigned to James and Rosa Henry</span>
Judith Hobson	<input type="text" value="Add a spouse"/>		128	<input type="checkbox"/>	<input type="text" value=""/>
Hattie Holdren	<input type="text" value="Add a spouse"/>		129	<input type="checkbox"/>	<input type="text" value="128"/> •
Ryan Holdren	<input type="text" value="Add a spouse"/>		–	<input checked="" type="checkbox"/>	<input type="text" value=""/>
Mary Howard	<input type="text" value="Add a spouse"/>		–	<input type="checkbox"/>	<input type="text" value=""/>
Thomas Howard	<input type="text" value="Add a spouse"/>		–	<input type="checkbox"/>	<input type="text" value=""/>


## Utility Bar

At the bottom of the Envelopes view, there should be a dark bar housing a renumbering utility and actions that can be applied to any unsaved changes made on the view.

- Renumber - This action will automatically renumber all visible giving units alphabetically, starting with the number entered into the field to the left of the button.
- Clear All - This action will clear out all numbers for all visible giving units.
- Discard Changes - This action will discard any unsaved, unscheduled changes denoted with a dot on the right of the "Next Envelope" field.
- Apply Changes - This action will apply any unsaved, unscheduled changes denoted with a dot on the right of the "Next Envelope" field. This choice is immediate and cannot be undone.
- Schedule Renumbering - This action will save the current changes denoted with a dot on the right of the "Next Envelope" field and schedule a date when the envelopes will change. It is recommended to

schedule these changes a few weeks after the end of the year to allow for offerings to be added according to the previous year's envelope numbering.

- Delete Scheduled Renumbering - If an edit or renumbering has been scheduled instead of applied immediately, a button may appear with the option to discard any scheduled changes denoted in the "Scheduled Envelope" column.
- Save Scheduled Renumbering - If an edit or renumbering has been scheduled instead of applied immediately, a button may appear with the option to save (or resave) any scheduled changes denoted in the "Scheduled Envelope" column. This can also be used to schedule the renumbering on a different date.

Automatically renumber envelopes starting with       

200 giving units are scheduled to have a different envelope number on Jan 12, 2025

## Adding and Editing Envelope Numbers

In the Envelopes view, users can manually assign envelope numbers to new members or reassign individual envelope numbers as needed as well as choose to apply changes immediately or at a later date.

To add a new envelope number to a giver,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select “Envelopes” under the Offerings section.
3. Find the name of the person or couple whose envelope number you wish to add or adjust.
4. To assign a new envelope number, add or edit the number in the text box under “Next Envelope.”

Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
Dave Abbott	Sue Abbott	<input checked="" type="checkbox"/>	–	<input type="checkbox"/>	101 •

5. If you wish to add a spouse for the contributor, add the spouse’s name in the “Spouse” box.

Note: Only those with permissions to edit person records have the ability to add a spouse.

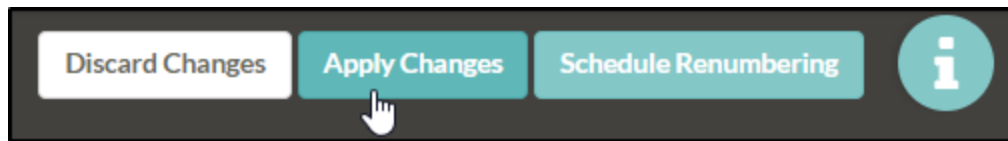
Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
Jacob Abbott	lacey ab Lacey Abbott	<input type="checkbox"/>	–	<input type="checkbox"/>	

- The “Contributes Jointly” box will be automatically selected when you do this.
- If the spouse's name is already referenced in the "Spouse" box, just make sure the "Contributes Jointly" box is checked if they are going to be giving together.

Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
Jacob Abbott	Lacey Abbott	<input checked="" type="checkbox"/>	—	<input type="checkbox"/>	<input type="text"/>

6. Repeat Steps 4 and 5 as needed.

7. When all changes have been made, go down to the ribbon of Action buttons at the bottom of the screen to choose when the changes should take effect; choose “Apply Changes” (now) or “Schedule Renumbering” (for later).



Note: If the new envelope number already exists for another person, you will be notified of this on the right side of the screen and asked to choose a different number.

David Alexander	Shirley Alexander	<input checked="" type="checkbox"/>	172	<input type="checkbox"/>	<input type="text" value="132"/>	Envelope #132 is already assigned to Amanda Kessler
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## Removing Envelope Numbers

You can manage envelope numbers by adding or removing envelope-number assignments. This feature allows you to remove envelope numbers from members who have transferred out of your congregation.

You can also choose to remove envelope numbers now, or to schedule changes to take effect later. In the Envelopes view, you can schedule and view envelope numbers for one date in the future.

1. Click on the gear icon and select “Envelopes.”
2. Find the name of the person whose envelope number you wish to adjust.
3. Delete the number in the text box under “Next Envelope.”
4. In the ribbon at the bottom of the screen, choose when you want your changes to take effect; choose “Apply Changes” to have your changes happen immediately or “Schedule Renumbering” to have the changes take place on the date of your choice.

Envelopes					
Today					
Type to filter people				Showing 234 people in Members ▾ ☰	
Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
Dave Abbott	Sue Abbott	<input type="checkbox"/>	1	<input type="checkbox"/>	<input type="text" value="1"/>

## Renumbering Envelopes

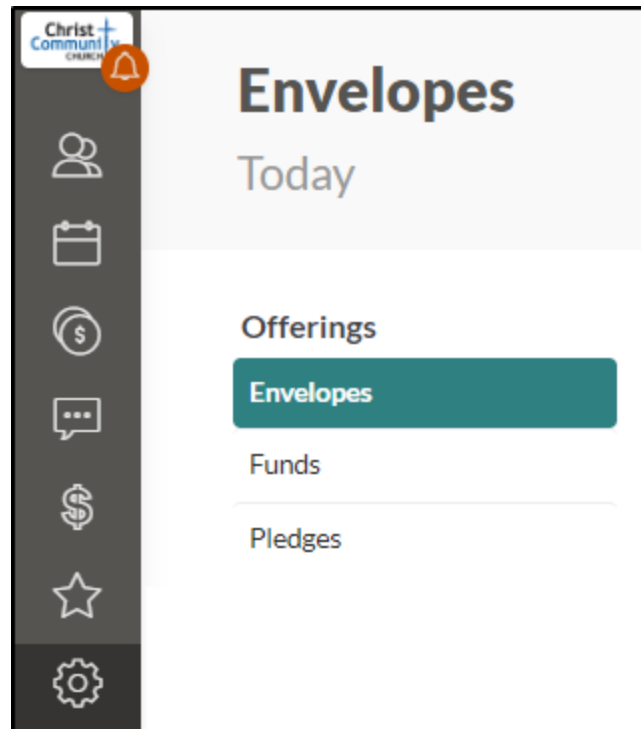
Near the end of the year, users may want to review their list of givers and their envelope numbers to consolidate, update, and better organize numbers for easier data entry and envelope ordering.

Envelope numbers can be added and edited manually as detailed in [this article](#) or the renumbering utility can be used to renumber envelopes for selected givers alphabetically.

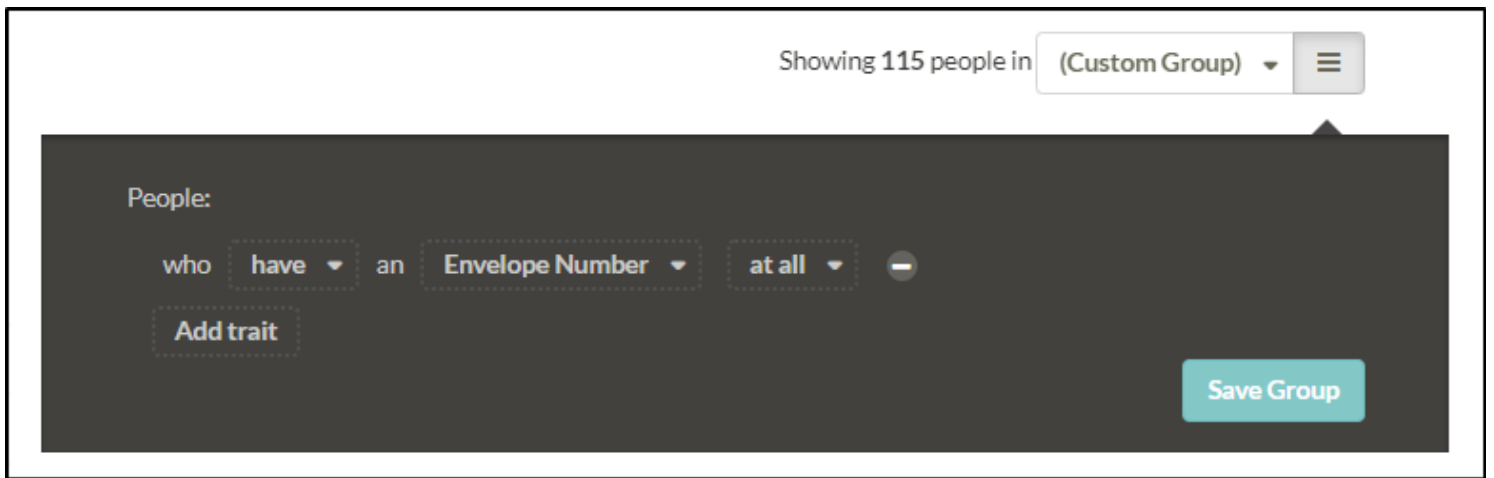
It's important to note that Church360° does not require givers to have an envelope number in order to attach offerings and print contribution statements nor does it require users to renumber each year. This process can be done at any time during the year as the church needs.

To add a new envelope number to a giver,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select “Envelopes” under the Offerings section.



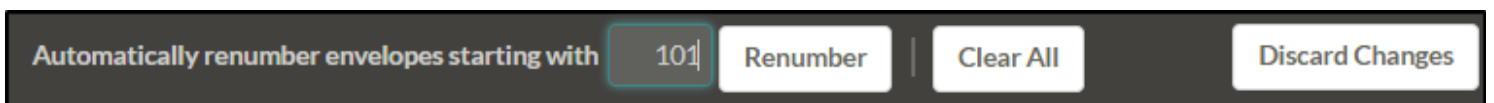
3. To make sure only relevant individuals are selected for renumbering, use the drop-down menu to the right to select a Smart Group or use the Smart Group traits to filter those you want to renumber.



4. For those you do not want to renumber for the coming year, clear out the field under "Next Envelope" and check the box to mark them as "Don't Renumber".

Name	Spouse	Contributes Jointly	Current Envelope	Don't Renumber	Next Envelope
†Charles Hobs...	Add a spouse		62	<input checked="" type="checkbox"/>	<input type="text" value=""/>

5. Use the bottom black bar to select the beginning number for your envelopes and click "Renumber". Only records that are visible will be renumbered alphabetically. Pending changes will be denoted by a black dot to the right of the "Next Envelope" column.



6. Check to see if numbers are accurate and correct.

- If there is a message stating a number is already in use, there is a good chance the number is being filtered out. Change your filters to include everyone and remove numbers from any givers that don't need them.
- If you want to remove all numbers from the "Next Envelope" field for all visible records, click "Clear All".
- To remove all pending changes and go back to the last saved status, click "Discard Changes".

7. If the "Next Envelope" numbers are correct, click to either "Apply Changes" immediately or "Schedule Renumbering" to apply the changes at a later date.

Apply Changes

Schedule Renumbering

### Apply Envelope Renumbering Immediately

×

You are about to apply changes to 154 envelopes in the **Current Envelope** column and change the joint contribution status of 7 marriages.

**Warning:** This change will take place **immediately** and cannot be undone.

Cancel

Apply Now

### Apply Later

×

Renumber 154 envelopes and change the contribution status of 7 marriages on

Jan 12, 2025

Cancel

Save

- If the "Apply Changes" and "Schedule Renumbering" buttons are greyed out, there is a good chance there is a conflict. Change your filters to include everyone and remove numbers from any givers that don't need them.
- It is recommended to allow for some buffer time between applying a large renumbering and the end of the year by scheduling renumberings an extra week or two from when your envelopes actually change over. (For example, if your new envelopes go into effect on January 1st, it may be a good idea to set your new envelopes to take effect on January 8th so you have a week to finish entering all the previous year's offerings under the old numbers).
- Church360° does not keep previous envelope numbers after changes have been applied. So it's recommended to [export an envelope list](#) before applying a large amount of changes.

If you schedule a renumbering, you can reopen the renumbering by going back to the Envelopes view and clicking "Edit Scheduled Renumbering" at the top of the view (visible only when a renumbering has been scheduled and not applied).

147 giving units are scheduled to have a different envelope number on Jan 1, 2025

[Edit Scheduled Renumbering](#)

From the edit view, you can make additional changes, discard changes, delete the scheduled renumbering entirely, and (re)save the scheduled changes on a date of your choosing.

[Back](#)

[Discard Changes](#)

[Delete Scheduled Renumbering](#)

[Save Scheduled Renumbering](#)

For a video demonstration of renumbering envelope numbers, please visit [this article](#).

## 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.

The screenshot displays the 'People' view in 'Givers' mode. At the top, there are navigation tabs for 'Individuals', 'Households', 'Givers', 'Marriages', 'Pastoral Visits', and 'Church Register'. Below these is a search bar and a filter section with a dropdown menu set to 'Envelope Number' and a filter type of 'at all'. A table of givers is shown with columns: Giver Name, Address, Envelope Number, Next Envelope Number, and Type. An 'Export' dropdown menu is open, with 'Excel' selected. A 'Save Group' button is located in the bottom right corner of the table area.

<input type="checkbox"/>	Giver Name	Address	Envelope Number	Next Envelope Number	Type
<input type="checkbox"/>	David and Susanne Alice (Porter) Abbott	3962 Franklee Lane Bakersville, MO 63027	101	101	Marriage
<input type="checkbox"/>	Sally L. Baxter	4223 Farm Meadow Drive Bakersville, MO 63027	102	102	Individual
<input type="checkbox"/>	Troy and Kira Lynn (Nelson) Belton	3456 Amethyst Drive Kantonburg, MO 63058	103	103	Marriage
<input type="checkbox"/>	Timothy Ronald Benedict	1628 Virginia Street Bakersville, MO 63027	104	104	Individual
<input type="checkbox"/>	Julie A. Billings	3948 Walton Street Bakersville, MO 63027	105	105	Individual
<input type="checkbox"/>	Howard Raymond Brown	3833 Cambridge Court Kantonburg, MO 63058	106	106	Individual
<input type="checkbox"/>	Robert William Callaway	4857 Green Acres Road Bakersville, MO 63027	107	107	Individual
<input type="checkbox"/>	Carmen Janice Carroll	3507 Tipple Road Bakersville, MO 63027	108	108	Individual
<input type="checkbox"/>	Teresa Wanda (Miller) Carter	142 Center Avenue Bakersville, MO 63027	109	109	Individual
<input type="checkbox"/>	Brian and Molly (Pan) Chung	3988 Lakeland Terrace Kantonburg, MO 63058	110	110	Marriage

## Navigating the Funds view

Throughout the year, members of your congregations will give offerings for specific purposes.

The Funds view allows users to create, edit, manage, and hide different funds for offerings as needed.

### Action buttons

Like other views, the Funds view has action buttons for specific tasks.

- Add Fund - This option will create a new entry for an uncategorized blank fund.
- Add Fund Category - This option will create an organizational category for easier fund management.
- Merge Funds - This option will merge one fund that is no longer needed as a distinct fund into another fund. This process is permanent, cannot be undone, and can affect fund reporting.
- Print - This option allows users to print a list of funds directly from your browser.
- Export - This option will export all funds, their category, number, exclusion options, and year-to-date total into a CSV file that users can edit and share.



### Fund List

All funds and their details are listed in the view.

- Name - Displays the name of the fund.
- Number - Displays the number for the fund. This is optional.
- Color - Displays the color an offering with this fund would show on the Offerings view.
- Exclude? - Displays if offerings given to the fund are to be excluded from giver's contribution statements. This can be used for any money given for a service or product, instead of a true donation.
- Non-Deductible? - Displays if offerings given to the fund are to be included on the giver statements, but under a heading for non-deductible offerings. This can be used for IRA or other non-deductible donations.

- Amount - Displays the year-to-date total for the fund.

## Actions for Funds

- Edit Fund/Fund Category - The pencil icon to the far right of a fund or category will open it for editing.
- Archive Fund - The archive box icon to the far right of a fund will archive it, sending into into the Archived category at the bottom of the view and removing it from future entry options, but not deleting any offering records. To retain historical data, funds with offering records can only be archived, not deleted. Clicking on the archive box icon again will restore it.
- Delete Fund/Fund Category- The trash can icon to the far right of a fund or category will remove it from the list. Only funds with no offering records can be deleted.

Uncategorized (\$1,210.00)						
Name	Number	Color	Exclude?	Non-Deductible?	Amount	Actions
General Fund	1	<span style="color: green;">●</span>			\$1,135.00 year-to-date	
Mission Fund	2	<span style="color: teal;">●</span>			\$0.00 year-to-date	
Youth Fund	3	<span style="color: blue;">●</span>			\$0.00 year-to-date	
Building Fund	4	<span style="color: purple;">●</span>			\$25.00 year-to-date	
Vacation Bible School	5	<span style="color: magenta;">●</span>			\$0.00 year-to-date	
Education	6	<span style="color: red;">●</span>			\$0.00 year-to-date	
Church at Large	11	<span style="color: darkblue;">●</span>			\$0.00 year-to-date	
Social Concerns	12	<span style="color: grey;">●</span>			\$50.00 year-to-date	
IRA Contributions	13	<span style="color: green;">●</span>		✓	\$0.00 year-to-date	
Ministries (\$70.00)						
Name	Number	Color	Exclude?	Non-Deductible?	Amount	Actions
Womens Ministry	10	<span style="color: orange;">●</span>			\$30.00 year-to-date	
Young Adults Ministry	9	<span style="color: grey;">●</span>			\$0.00 year-to-date	
Music Ministry	7	<span style="color: gold;">●</span>			\$15.00 year-to-date	
Mens Ministry	8	<span style="color: purple;">●</span>			\$25.00 year-to-date	
Archived Funds (\$0.00)						
You have no funds in Archived Funds yet.						

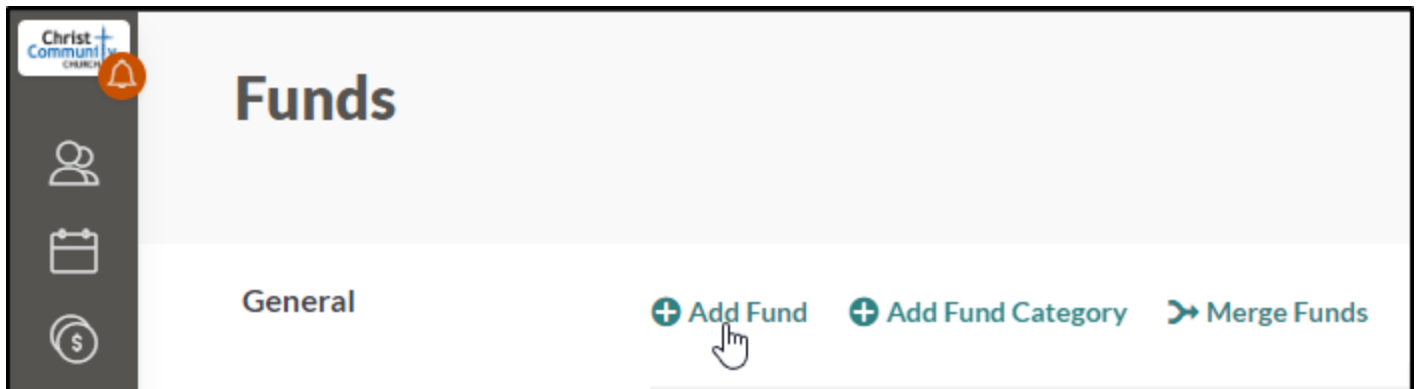
## Adding Funds

The Funds view organizes the specific purposes and causes that your congregation can designate their pledges and offerings to.


As new needs in your church arise, funds can be created to reflect those needs, such as a building fund for a new sanctuary. From this view, you can add funds as they are needed.

To add a new fund,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select “Funds” under the Offerings section.
3. Click to “Add Fund” to create a new fund. The new entry will appear last in your list.



4. Type in the name of the fund. The name can be as general or specific as you'd need.
5. Enter in a fund number if desired. This may make selecting funds from the offering entry screen easier.
6. Choose a color for offerings for this fund to appear on Offering views.
7. Check the box to "Exclude from statements" if offerings made to this fund should be left off of tax statements.
8. Check the box to mark a fund as "Nondeductible" if offerings made to this fund should be marked as nondeductible offerings on a statement (if not excluded from statements).
9. Click "Save" to save your new entry to the fund list.

Name Memorial Fund	Number 1007	Color 	<input type="checkbox"/> Exclude from statements	<input type="checkbox"/> Nondeductible	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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To move a fund's position in the list, click the icon to the left of the name and drag the fund to its new placement. Release the mouse to lock in its position. Changes will be automatically saved.

## Editing Funds

If a fund has been created with a typo or other mistake, users can reopen it for editing to make corrections.

To edit an existing fund,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Funds" under the Offerings section.
3. Click on the pencil icon to the far right of the fund to open it for editing.
4. Make any edits needed for your fund and click "Save" to save those changes.

Name	Number	Color	Exclude?	Non-Deductible?	Amount	Actions
☰ Mission Fund	1002	●			\$1,268.00 year-to-date	  <b>Edit</b>

To rearrange fund order, click the icon to the left of a name and drag the fund to its new placement. Release the mouse to lock in its position. Changes will be automatically saved.

## Categorizing Funds

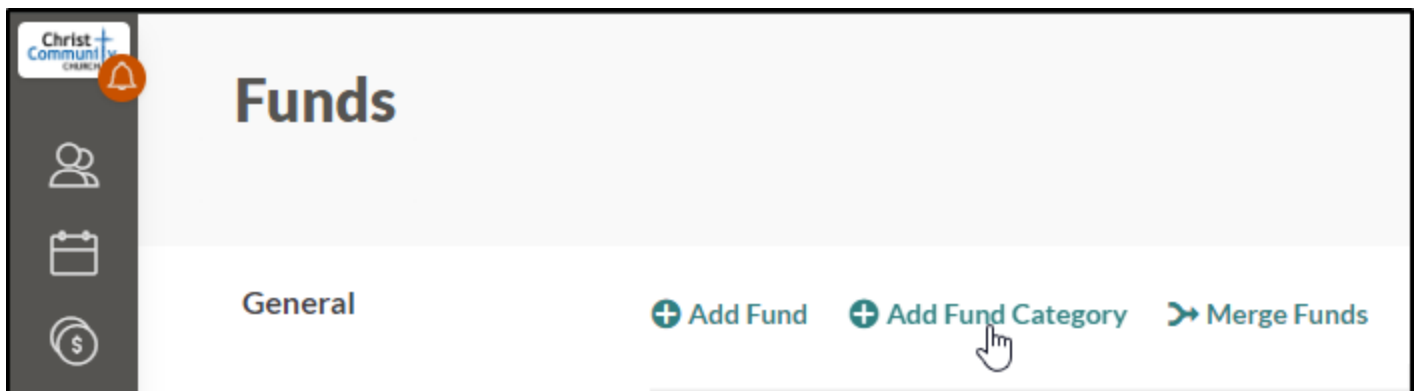
With the rewritten Funds view, you can now group similar funds together under a category. Categories will also display a YTD total of all funds within it for easier reading.

Initially, your funds will show under the Uncategorized section but can be rearranged by clicking on the dots to the left of the fund name to drag and drop your new fund where you'd like. Similarly, categories can be moved as well.

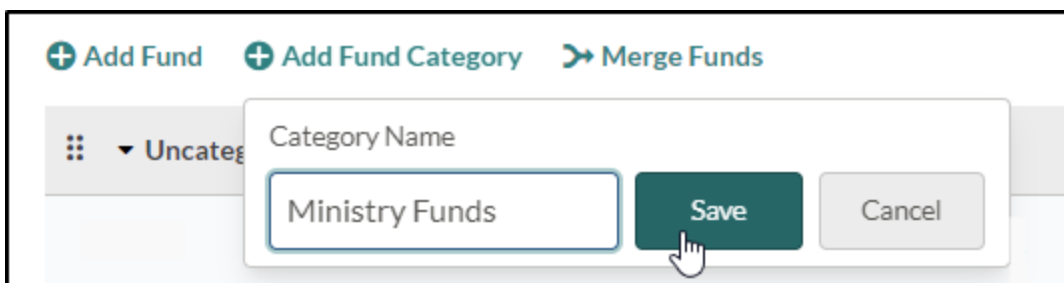
How you arrange your categories and funds will affect how the funds are ordered during offering entry.

To add a fund category,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Funds" under the Offerings section.
3. Click to "Add Fund Category" to create a new category for funds to be assigned under.



4. Type in the name of the category and click "Save".



Once a category has been created, funds can be moved under that category by clicking the icon to the left of the fund name and dragging the fund where it needs to be. Release the mouse to lock in its position and changes will be automatically saved.

	Music Ministry	1007	
	Young Adults Ministry	1009	
	Church at Large	1011	
	Social Concerns	1012	
	General Fund		
	▼ Ministry Funds (\$0.00) 		
	Name	Number	Color
	Womens Ministry	1010	
	Mens Ministry	1008	

To edit a category name, click on the pencil icon to the far right of the row.

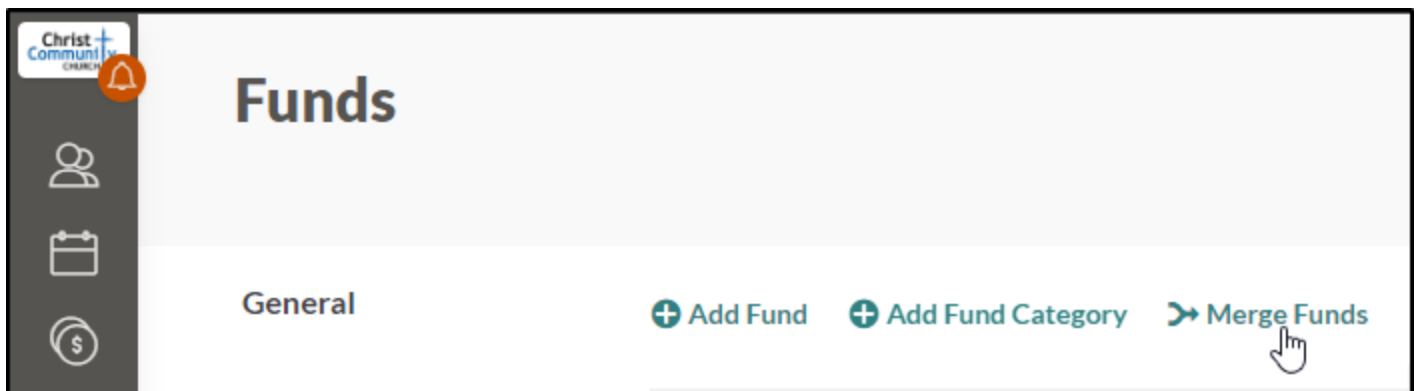
## Merging Funds

Sometimes funds with similar purposes can cause the Funds view to get a little crowded. For easier reading, you may choose to merge funds together.

This action cannot be undone so it's important to wait until the individual funds are no longer needed for offering entry or reporting.

To merge two funds together,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Funds" under the Offerings section.
3. Click to "Merge Funds" to start the merging process.



4. In the merging window, use the first drop-down menu to choose the fund you want to combine to another. All offerings from this fund will be moved over to the other fund.
5. Use the second drop-down menu to choose the fund that will be receiving the offerings from the other fund. This fund will retain its name in the transfer.
6. Click the "Merge Selected Funds" button.



## Merge Funds

**Merge...**

Memorial Fund - Casey Roberts ▾



**...Into**

Memorial Fund - Past Years ▾

**Warning:** This cannot be undone.

Merge Selected Funds

Cancel

## Archiving and Deleting Funds

If a fund has no offerings or pledges attributed to it, you can simply delete the fund from your Funds view. However, even if your fund is no longer used, you may not want to lose a fund's giving history.

Archiving a fund will remove the ability for people to give offerings toward it while also keeping its data intact. This can be a temporary state as you can always reactivate the fund if your congregation starts giving to it again.

To archive or delete a fund,

1. Click on the gear icon to open your Settings view.
  2. On the navigation menu on the left, select "Funds" under the Offerings section.
  3. Click on the second icon to the far right of the fund (either a box or a trashcan) to remove it from the list.
- Click the box icon to archive the fund, hiding it from reports and other views. Click the box icon again to unarchive the fund.
  - Click the trash can icon to delete the fund.

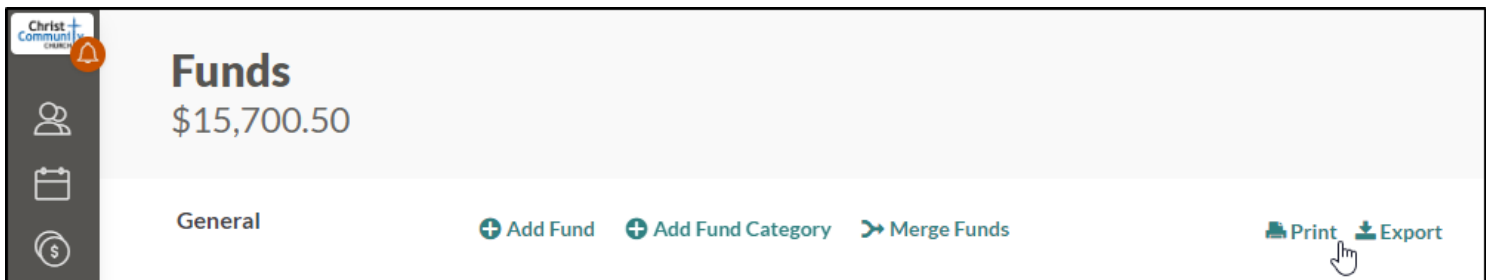


## Printing or Exporting a Fund List

You may want to print or export your list of funds for the sake of retaining a hard copy or reporting on current balances.

To print or export your fund list and their settings,

1. Click on the gear icon to open your Settings view.
  2. On the navigation menu on the left, select "Funds" under the Offerings section.
  3. At the upper right of the view, click to print or export the list.
- Click "Print" to open the list in a print preview.
  - Click "Export" to export the list into a CSV file.



## Navigating the Pledges View

The Pledges view shows all pledges by members to give offerings for a particular date range and/or purpose.

Pledges will be added here and can be reviewed from a person's record or on the Offerings view in relation to current giving. Summaries of pledges can also be displayed on a giver's contribution statement.



### Action buttons and Pledge filter

Like other views, the Pledges view has action buttons for specific tasks.

- Download - This action will export all visible entries into a CSV or Excel file that you can edit and share.
- Print - This action will open a print preview of all visible entries directly from your browser.

Directly under the Action buttons, there is also a drop-down filter to show only Active pledges (where today's date falls within their set date range) or All pledges (both active and inactive). What is visible is what will be shown in any exports or printed pages.

A screenshot of the Pledge entry form. It contains several input fields: a dropdown menu for "Giver", a text box for "Amount", a dropdown menu for "Period" (set to "Every week"), a text box for "Starts", a text box for "Ends", and a dropdown menu for "Fund" (set to "General Fund (1)"). A teal "Add Pledge" button is located on the right side of the form.

To enter in a pledge, users can enter in a giving unit's name, the amount given per period (not the total amount unless specified by the period, how often this amount will be given, the start and ending dates for the pledge, and the fund. Click the "Add Pledge" button to confirm the entry.

### Pledges List

Below the entry row, all available entries can be seen for reference. Entries can be clicked to open them for editing. Any field, except for the Giver name, can be edited. Hovering over an entry produces a faint grey minus sign to the far right of the record can be clicked to delete an entry permanently.

- Note: A pledge's Giver name or Fund can be clicked on to apply a filter for the view.

David and Shirley Alexander >	\$87.00	Every week	Jan 1, 2024	Dec 31, 2024	General Fund (1) >	\$0.00 given-to-date >	⊖
Chad and Mary Lane >	\$150.00	Every month	Jan 1, 2024	Dec 31, 2024	General Fund (1) >	\$0.00 given-to-date >	⊖
Chad and Mary Lane >	\$15.00	Every week	Jan 1, 2024	Dec 31, 2024	Womens Ministry (10) >	\$0.00 given-to-date >	⊖
Patricia Lewis >	\$100.00	Every month	Jan 1, 2024	Dec 31, 2024	Building Fund (4) >	\$0.00 given-to-date >	⊖
Howard Montgomery >	\$40.00	Every month	Jan 1, 2024	Dec 31, 2024	General Fund (1) >	\$0.00 given-to-date >	⊖
Richard and Virginia Montgomery >	\$20.00	Every month	Jan 1, 2024	Dec 31, 2024	General Fund (1) >	\$0.00 given-to-date >	⊖
Richard and Virginia Montgomery >	\$145.00	Total amount	Jan 1, 2024	Dec 31, 2024	Building Fund (4) >	\$0.00 given-to-date >	⊖

## Adding Pledges

People often plan their giving to their church through pledges. The Pledges feature allows you to enter and keep track of different pledges as people give over different periods of time.

Once the pledge has been added, any offerings entered by the selected giver for the selected fund within the selected date range will be counted towards the pledge. Pledges can be added before or after offerings batches are entered for the date range.

To add a new pledge,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Pledges" under the Offerings section.
3. In the entry bar at the top of the view, start by using the drop-down menu to select the giver who is pledging.
4. Enter in the amount they plan to give each time period as well as the frequency of their giving. This will be used to calculate the total amount pledged. If the giver only wants a total amount, users can choose "Total amount" under Frequency.
5. Enter the starting and ending date for the pledge. Only the amount of complete time periods within the date range will be used in calculation of the pledge and the giver's progress.
6. Enter in the fund the pledge is for and click "Add Pledge" to confirm the entry.

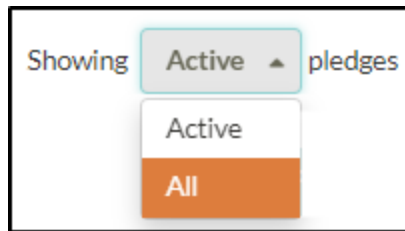
Giver	Amount	Period	Starts	Ends	Fund	
James and Rosa Henry ▾	100	Every month ▾	Jan 1, 2024	Dec 31, 2024	General Fund ▾	<a href="#">Add Pledge</a>

## Editing Pledges

If an existing pledge needs to be adjusted, they can be reopened and edited as needed. The only field that cannot be edited would be the giver's name. If a pledge is attributed to the wrong giver, it's recommended to delete the pledge entirely and recreate the pledge.

To edit a pledge,

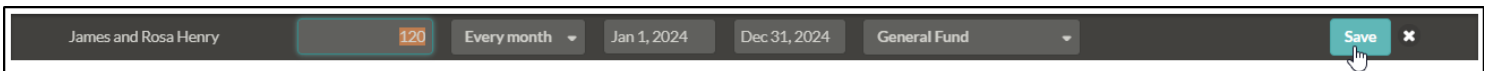
1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Pledges" under the Offerings section.
3. All active pledges should be visible under the entry row at the top. If you are looking for a pledge that is no longer active, use the view drop-down menu to choose to show all pledges.



4. Click on the pledge to open it for editing.



5. Make any edits you need and click "Save" to save your changes.

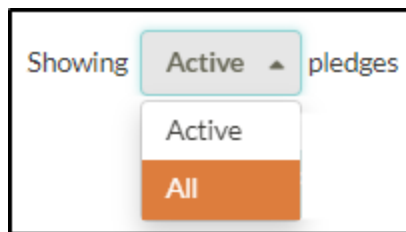


## Deleting Pledges

If a member cancels their pledge for any reason or if a pledge has been attributed to the wrong giver, a pledge may need to be deleted entirely.

To remove a pledge,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select "Pledges" under the Offerings section.
3. All active pledges should be visible under the entry row at the top. If you are looking for a pledge that is no longer active, use the view drop-down menu to choose to show all pledges.



4. Hover of the pledge and click on the gray minus sign to the right.
5. Click "Delete" to remove the pledge record permanently.



## Exporting Pledges List to CSV or Excel

Exporting your Pledges list to CSV or Excel can be helpful for allowing you to share a hard or electronic copy of your Pledges information with others.

To export a pledge list,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select “Pledges” under the Offerings section.
3. All active pledges should be visible under the entry row at the top. If you are looking to show all pledges, use the view drop-down menu to show all.



4. Click "Download" to export the list into a CSV or Excel file.

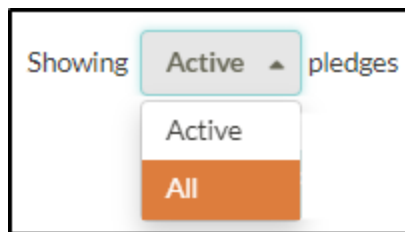


## Printing a Pledge List

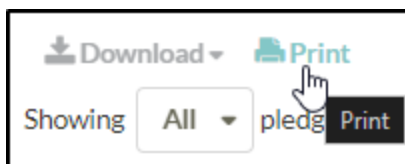
If the church office needs a list of active or all pledges, users can print a hard copy directly from the Pledges view.

To print a pledge list,

1. Click on the gear icon to open your Settings view.
2. On the navigation menu on the left, select “Pledges” under the Offerings section.
3. All active pledges should be visible under the entry row at the top. If you are looking to show all pledges, use the view drop-down menu to show all.



4. Click “Print” to open the list in a new browser tab. To print from the browser, press CTRL+P or right-click the page and choose “Print”.



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

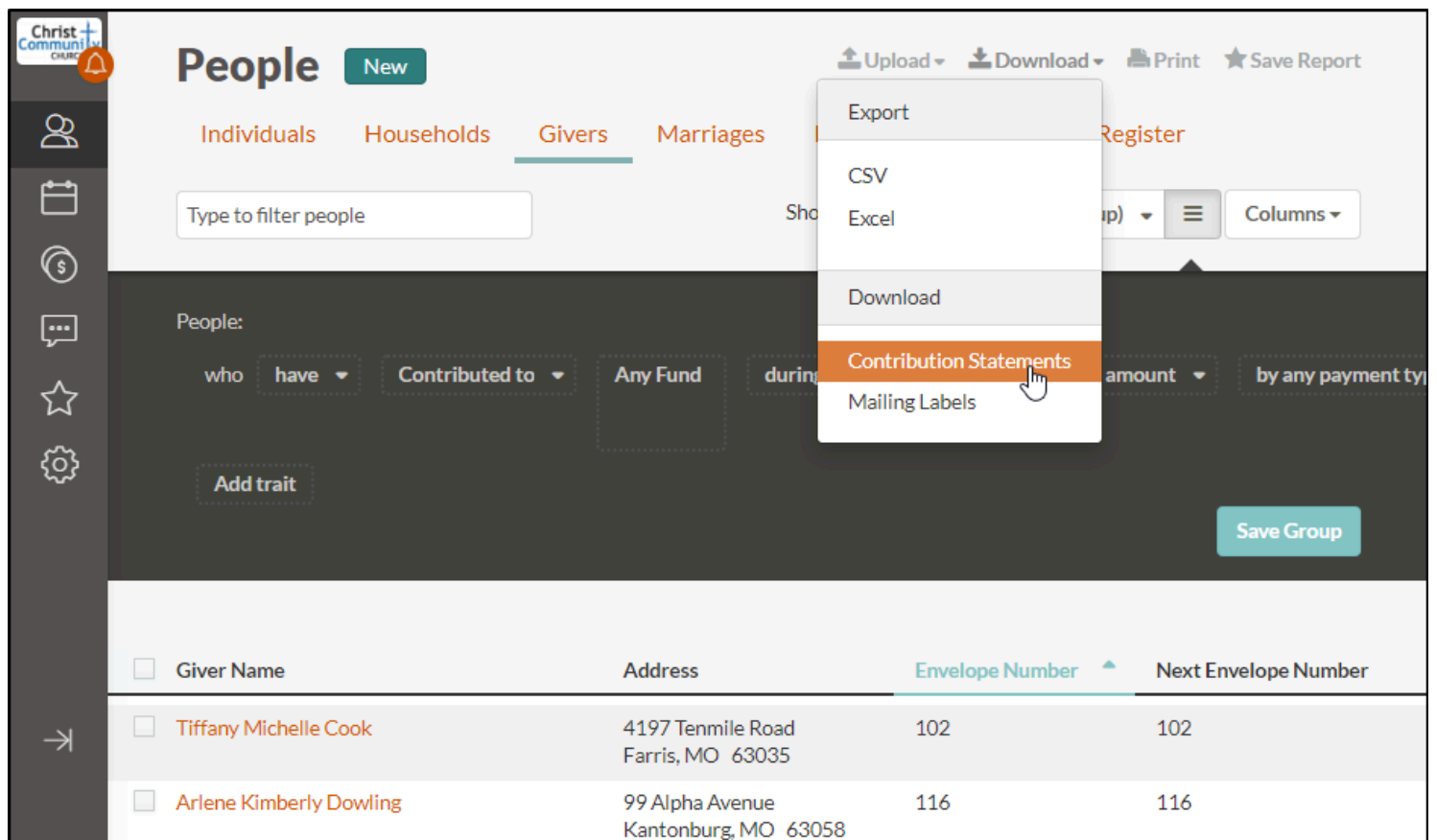
## Emailing Contribution Statements

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".



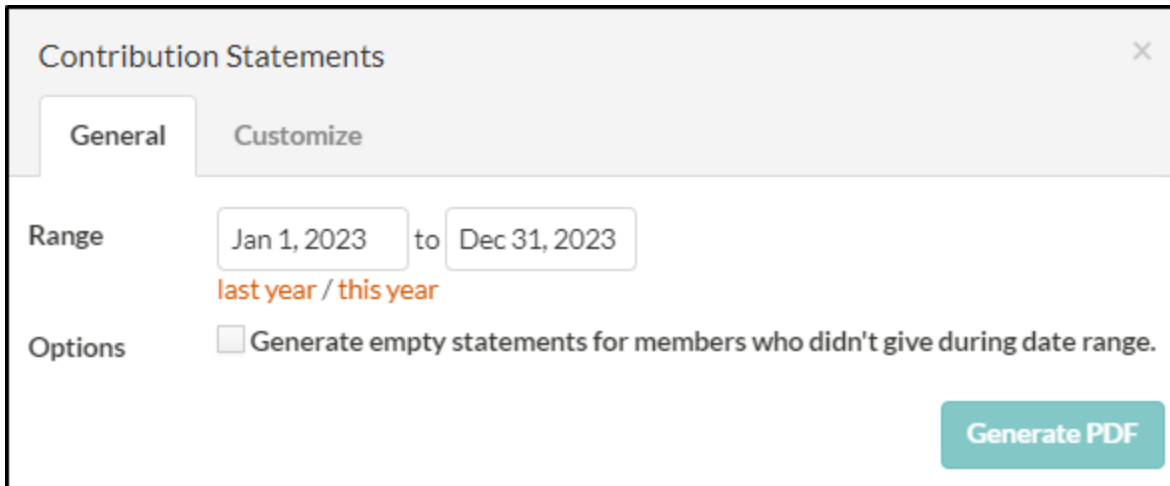
The screenshot shows the Church360° People view interface. At the top, there are navigation tabs for 'Individuals', 'Households', 'Givers', and 'Marriages'. The 'Givers' tab is selected. Below the tabs is a search bar with the placeholder text 'Type to filter people'. To the right of the search bar are buttons for 'Upload', 'Download', 'Print', and 'Save Report'. A dropdown menu is open over the 'Download' button, showing options: 'Export', 'CSV', 'Excel', 'Download', 'Contribution Statements', and 'Mailing Labels'. The 'Contribution Statements' option is highlighted with a mouse cursor. Below the menu, there are filters for 'People: who have Contributed to Any Fund during amount by any payment ty'. There is also an 'Add trait' button and a 'Save Group' button. At the bottom, there is a table with columns: 'Giver Name', 'Address', 'Envelope Number', and 'Next Envelope Number'. The table contains two rows of data:

<input type="checkbox"/>	Giver Name	Address	Envelope Number	Next Envelope Number
<input type="checkbox"/>	Tiffany Michelle Cook	4197 Tenmile Road Farris, MO 63035	102	102
<input type="checkbox"/>	Arlene Kimberly Dowling	99 Alpha Avenue Kantonburg, MO 63058	116	116

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

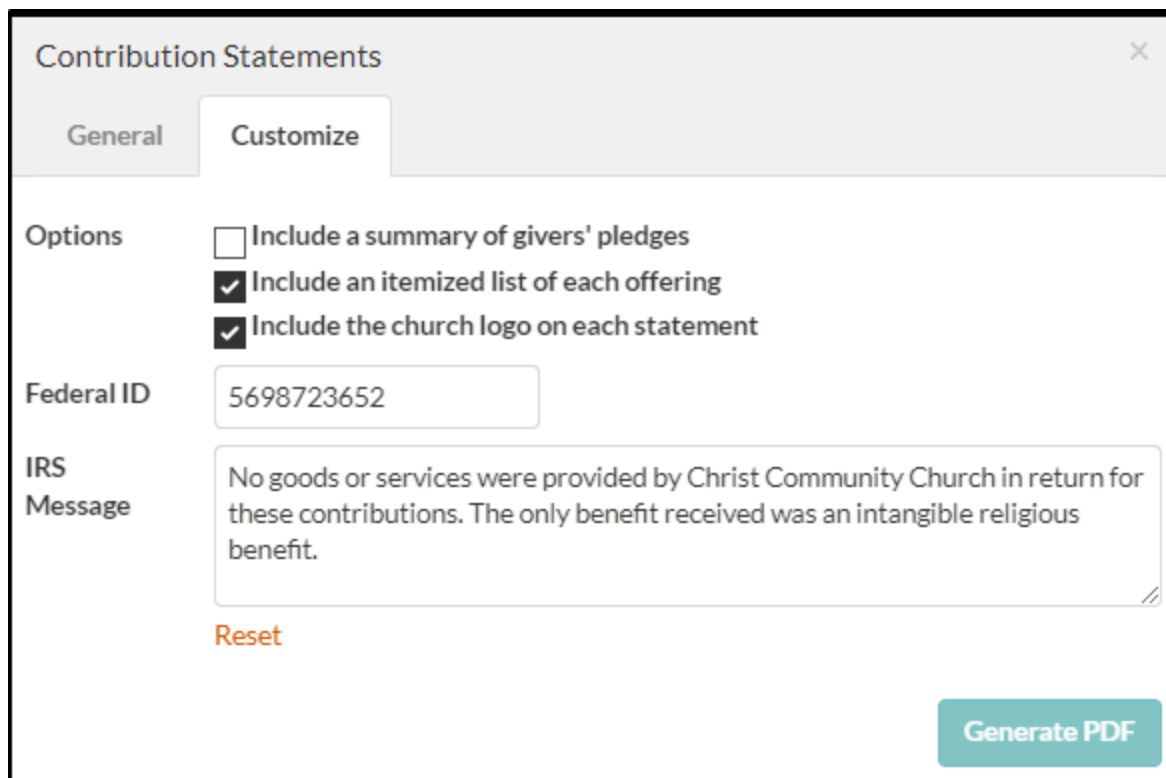
the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

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



The screenshot shows a dialog box titled "Contribution Statements" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Customize". Under the "General" tab, there is a "Range" section with two input fields: "Jan 1, 2023" and "Dec 31, 2023", with the text "last year / this year" in orange below them. Below the range is an "Options" section with a checkbox labeled "Generate empty statements for members who didn't give during date range." which is currently unchecked. A teal "Generate PDF" button is located in the bottom right corner.

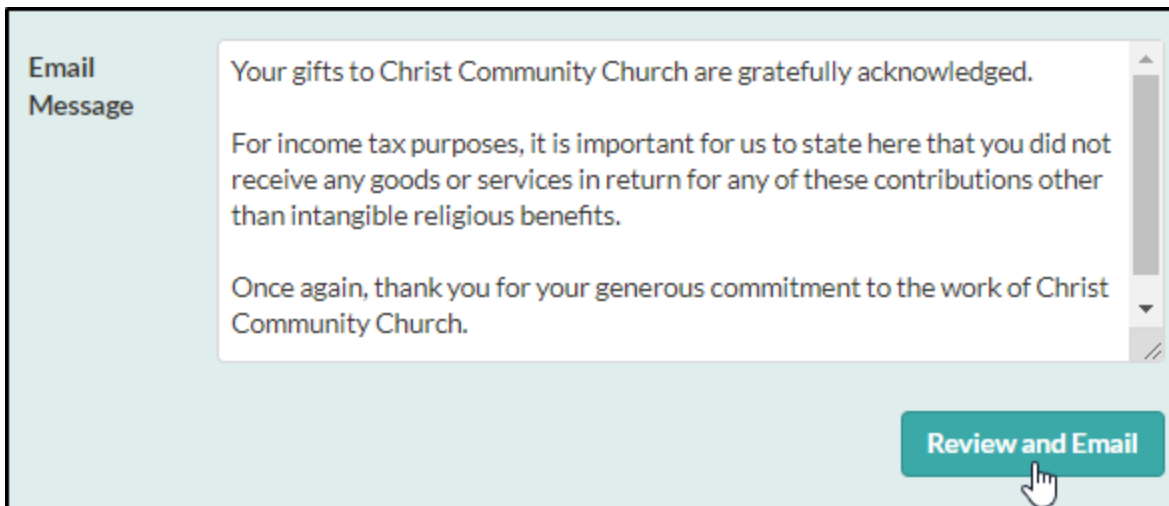
6. If this is the first time generating your statements, it's recommended that you take a look at the Customize tab before clicking the "Review and Email" button. Under the Customize tab, check whether you want to include a summary of the giver's pledges and/or an itemized list for each offering. Here,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



The screenshot shows the same "Contribution Statements" dialog box, but with the "Customize" tab selected. The "Options" section has three checkboxes: "Include a summary of givers' pledges" (unchecked), "Include an itemized list of each offering" (checked), and "Include the church logo on each statement" (checked). Below this is a "Federal ID" input field containing the number "5698723652". The "IRS Message" section has a text area containing the message: "No goods or services were provided by Christ Community Church in return for these contributions. The only benefit received was an intangible religious benefit." Below the text area is a "Reset" link in orange. A teal "Generate PDF" button is in the bottom right corner.

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	<input type="checkbox"/> saabbott@mailinator.com (personal) <input type="checkbox"/> sabbott@tciaccounting.com (work)
Dave Abbott	<input checked="" type="checkbox"/> dave.abbott@example.com (personal) <input type="checkbox"/> david.abbott@xmpaero.com (work)
David and Shirley Alexander	<input checked="" type="checkbox"/> dave.farnham@cph.org (personal)
Troy Allen	<input checked="" type="checkbox"/> t.allen43z@icloud.com (personal) <input checked="" type="checkbox"/> t.allen43@icloud.com (household)
James and Ellen Beaubien	<i>No email address on record.</i>
Julie Billings	<input checked="" type="checkbox"/> julie.billings@teleworm.us (personal)
Larry Brown	<input checked="" type="checkbox"/> larry.brown@live.com (personal) <input checked="" type="checkbox"/> larry.brown@live.com (household)
Brian Callaway	<i>No email address on record.</i>

Generate PDF

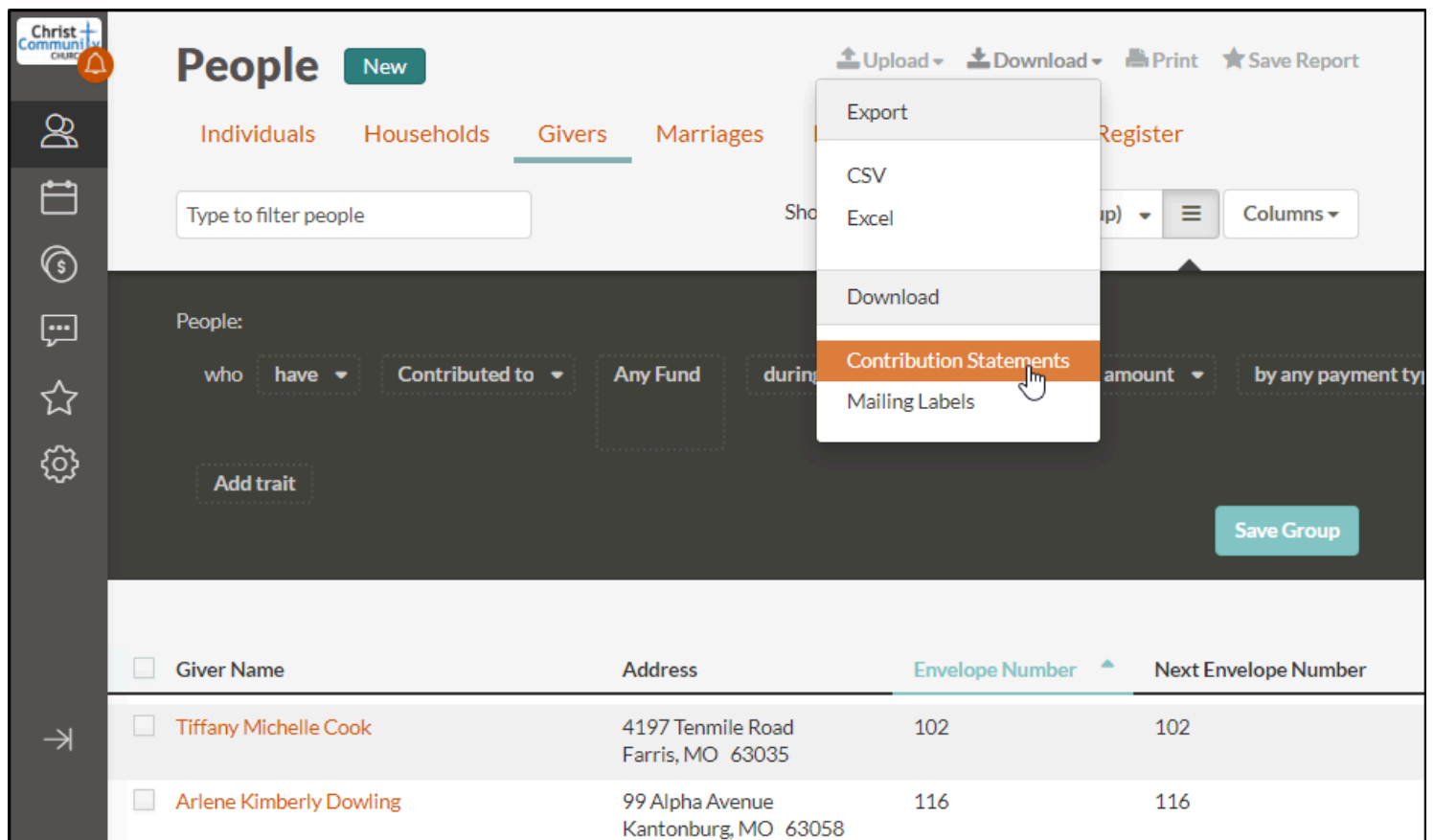
## Exporting Contribution Statements to PDF

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".



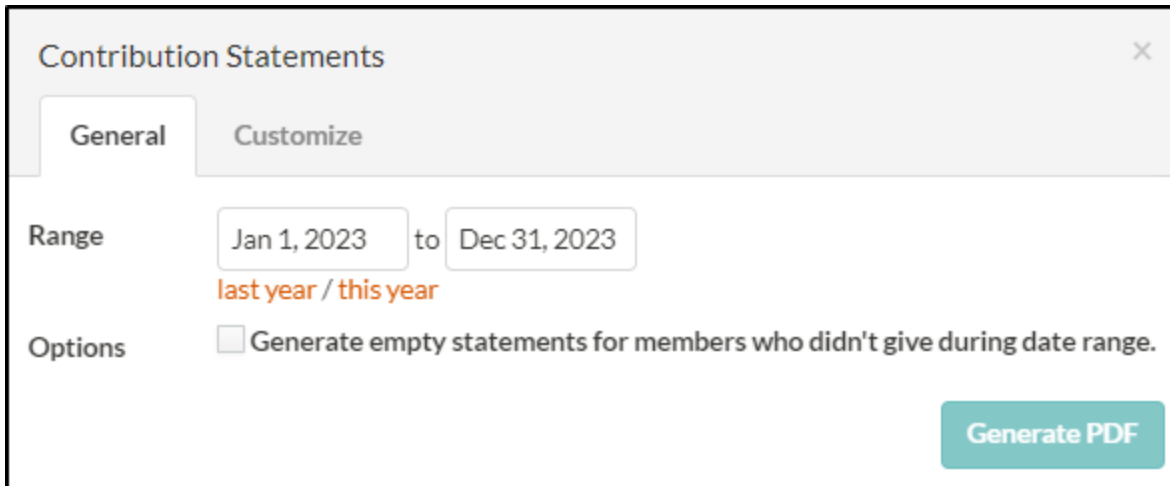
The screenshot shows the 'People' view in Church360°. The 'Givers' tab is selected. A 'Download' menu is open, showing options: Export, CSV, Excel, Download, Contribution Statements (highlighted), and Mailing Labels. Below the menu, a table of givers is visible:

<input type="checkbox"/>	Giver Name	Address	Envelope Number	Next Envelope Number
<input type="checkbox"/>	Tiffany Michelle Cook	4197 Tenmile Road Farris, MO 63035	102	102
<input type="checkbox"/>	Arlene Kimberly Dowling	99 Alpha Avenue Kantonburg, MO 63058	116	116

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

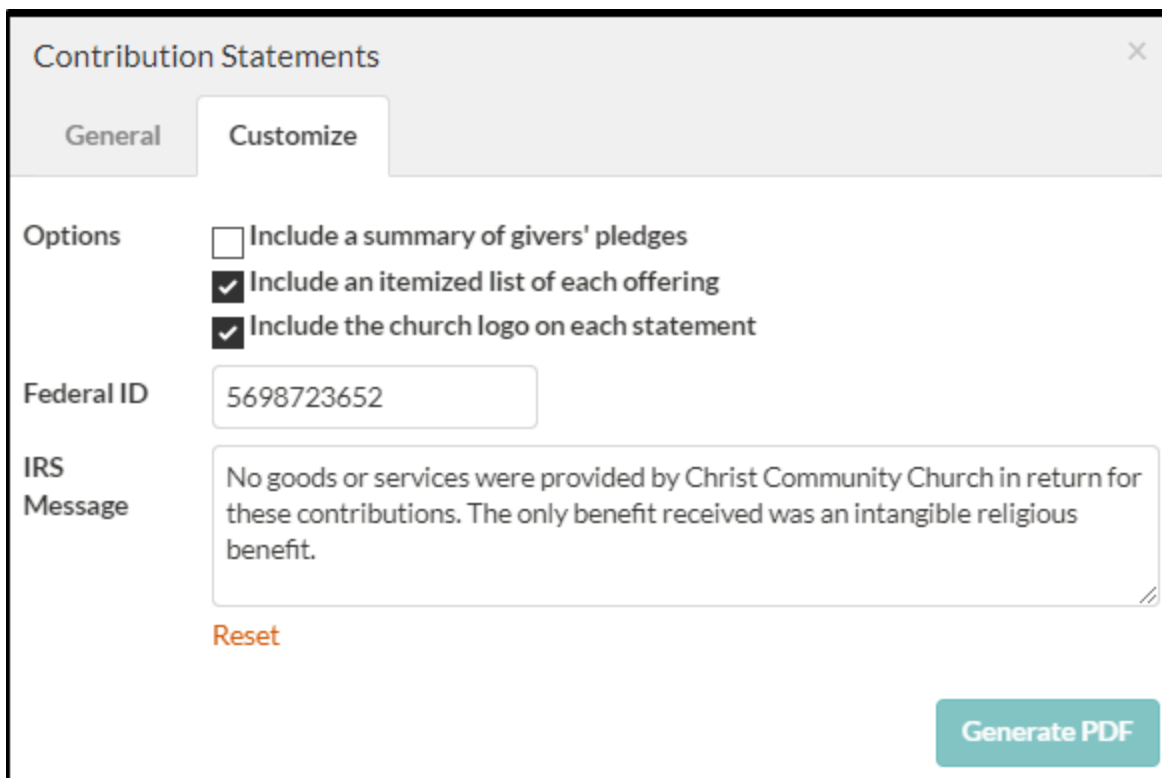
the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

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



The screenshot shows a dialog box titled "Contribution Statements" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Customize". Under the "General" tab, there is a "Range" section with two date input fields: "Jan 1, 2023" and "Dec 31, 2023", with the text "last year / this year" in orange below them. Below the range is an "Options" section with a checkbox labeled "Generate empty statements for members who didn't give during date range." which is currently unchecked. A teal "Generate PDF" button is located in the bottom right corner.

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.



The screenshot shows the same "Contribution Statements" dialog box, but with the "Customize" tab selected. Under the "Options" section, there are three checkboxes: "Include a summary of givers' pledges" (unchecked), "Include an itemized list of each offering" (checked), and "Include the church logo on each statement" (checked). Below the options is a "Federal ID" input field containing the number "5698723652". Underneath that is an "IRS Message" text area containing the text: "No goods or services were provided by Christ Community Church in return for these contributions. The only benefit received was an intangible religious benefit." Below the text area is a "Reset" link in orange. A teal "Generate PDF" button is in the bottom right corner.

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.

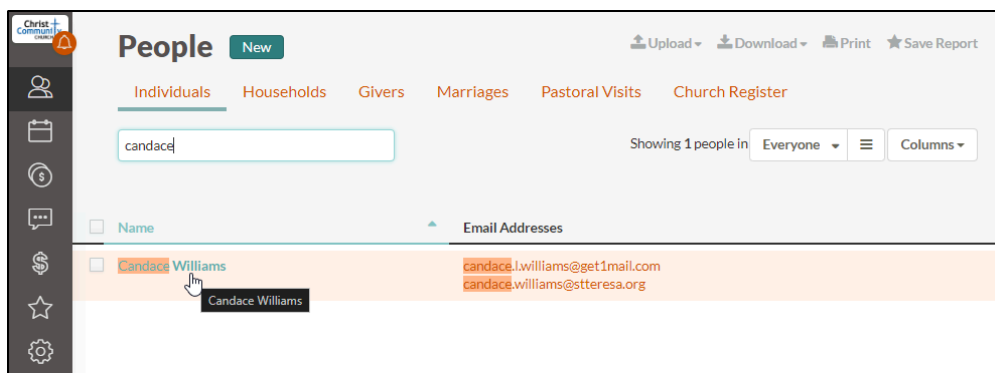
## Emailing an Individual's Contribution Statement from their Profile

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

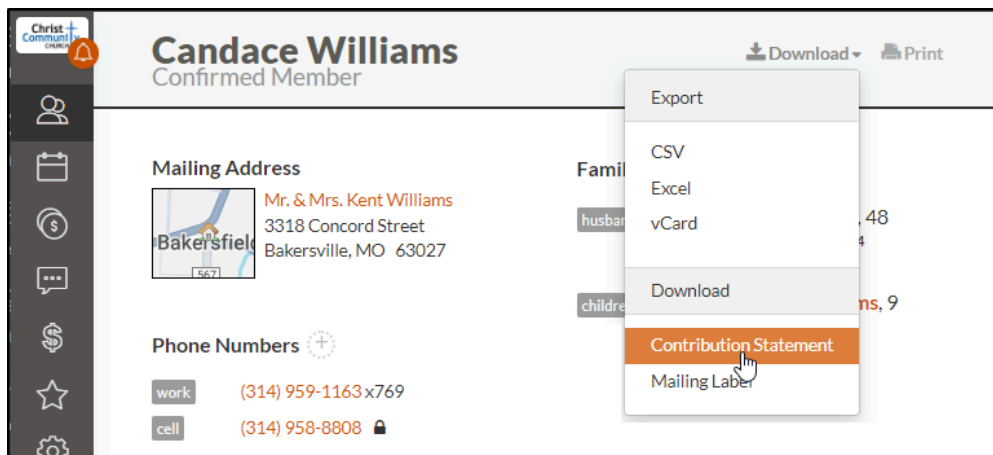
This feature is the best option to email a contribution statement for only one individual.

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.

Contribution Statement for Candace Williams

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.

Generate PDF

Email Message

Your gifts to Christ Community Church are gratefully acknowledged.

For income tax purposes, it is important for us to state here that you did not receive any goods or services in return for any of these contributions other than intangible religious benefits.

Once again, thank you for your generous commitment to the work of Christ Community Church.

Review and Email

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

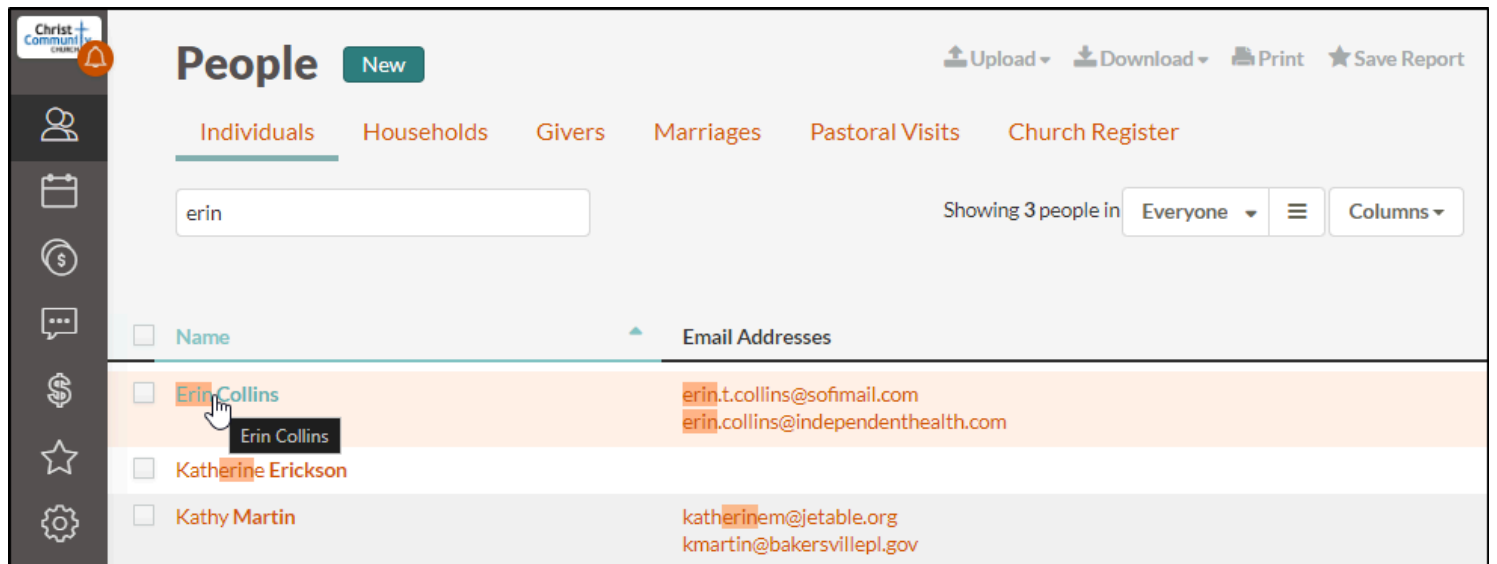
Send

## Printing 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".

Christ Community Church

**Erin Collins**  
Confirmed Member

Download Print

Export

CSV

Excel

vCard

Download

**Contribution Statement**

Mailing Label

Mailing Address: Mr. & Mrs. James Collins, 3816 O Conner Street, Bakersville, MO 63027

Phone Numbers: work (314) 959-7832, cell (314) 958-4415, household (314) 958-6175

Family: husband (32), children (4)

Tags: Add a tag

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.

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.

Generate PDF

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



## 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".

The screenshot shows the 'People' view in 'Givers' mode. At the top, there are tabs for 'Individuals', 'Households', 'Givers', and 'Marriages'. Below the tabs is a search bar and a filter section. The filter section shows a dropdown menu with 'Envelope Number' selected. A 'Download' button is visible in the top right corner, and a 'Save Group' button is at the bottom right. A dropdown menu is open over the 'Download' button, showing options: 'Export' (with sub-options 'CSV' and 'Excel'), 'Download', 'Contribution Statements', and 'Mailing Labels'. The 'Mailing Labels' option is highlighted with a mouse cursor. Below the menu, a table of givers is visible with columns for 'Giver Name', 'Address', 'Envelope Number', and 'Next Envelope Number'.

<input type="checkbox"/>	Giver Name	Address	Envelope Number	Next Envelope Number
<input type="checkbox"/>	Jeffrey D Alexander	4027 Court Street Gray Summit, MO 63039	101	101
<input type="checkbox"/>	Tiffany Michelle Cook	4197 Tenmile Road Farris, MO 63035	102	102
<input type="checkbox"/>	Frank L. Culbertson	346 Hide A Way Road Bakersville, MO 63027	103	103


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.

### Download Mailing Labels ✕


**Template** Avery 5160 ▾

**Options**  
 Print addresses  
 Print barcodes

**Envelope Numbers**  
Don't print ▾  
Don't print  
Print current numbers  
**Print next numbers** 

30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000	30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000	30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000
30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000	30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000	30 and 11th, Sherrill Jones 1218 Donaghy Lane Donaghy, CT, EA 10000-0000
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Page 1 of 2 Next

 6 of these labels have blank or incomplete addresses.  
You can filter out incomplete addresses with Smart Groups.

Generate ▾