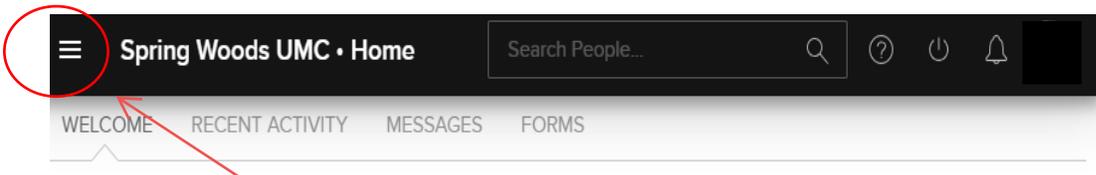


Accessing Giving Statement / Pledge Statement

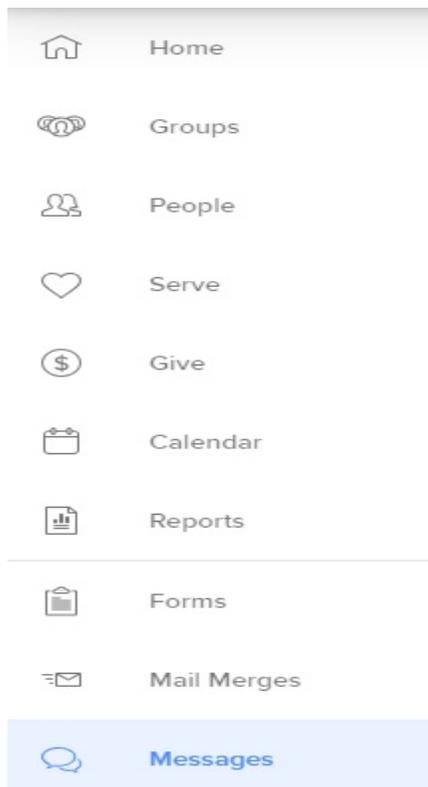
Accessing Your Giving Statements

1. **Log into** CCB with your username and password. A Title bar will appear at the top of the page, as shown.



2. **Click on the menu icon**  located at the far left on the Title bar.

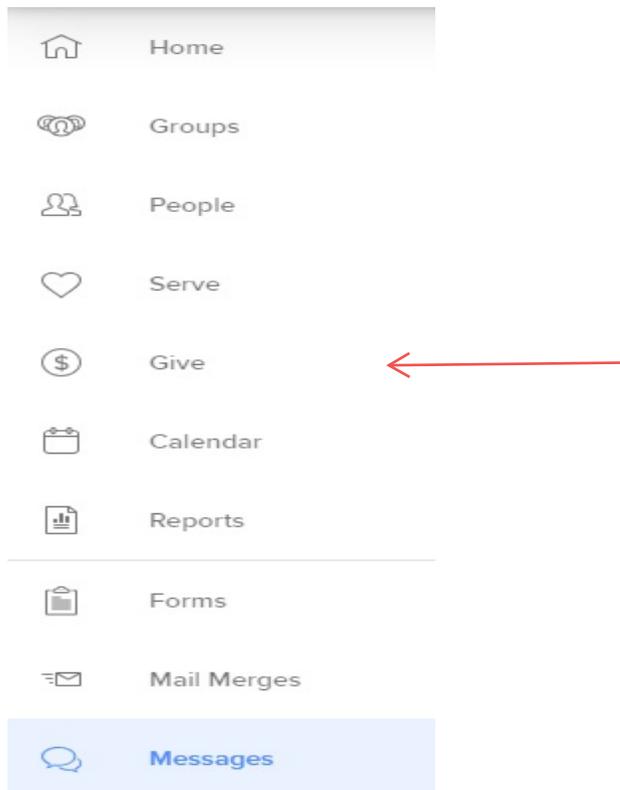
A drop down menu of selections that are available will appear, as shown below.



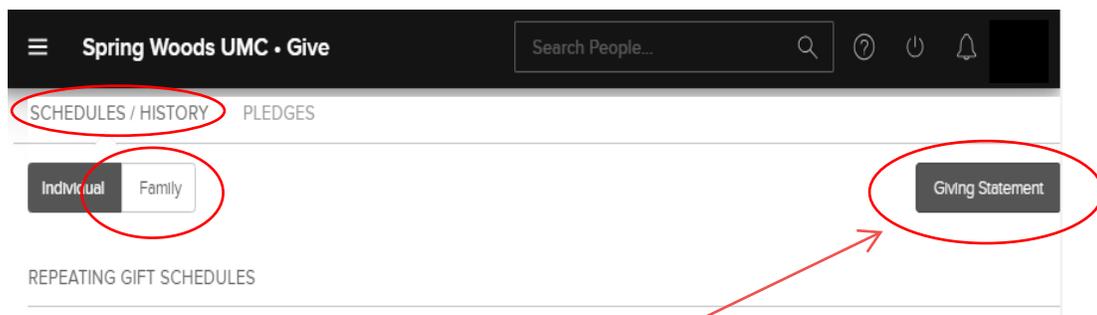
Accessing Giving Statement / Pledge Statement

3. Select “ Give ”

[See the arrow pointing]



4. The ' Spring Woods UMC - Give ' title bar will appear, as shown



5. If the words “GIVING STATEMENT” appears inside a black box, on the right, go to step 6. Otherwise click the words ' SCHEDULE / HISTORY ' again until the black box reads “GIVING STATEMENT”

Accessing Giving Statement / Pledge Statement

6. Select ' Family '.
7. Select ' Giving Statement ' The “Giving Statements reports selection menu appears, as shown below

Giving Statements

Slide bar is UP

Type

You can create giving statements for families or Individuals.

Family

Date Range

Select a "Quick Date Range" from the pulldown or click into the input fields to easily enter the start and end dates.

Quick Date Range...

Custom Date Range

Cancel Run Report

8. From this selection menu, there are many different options for designing a Giving Statement of your choice. You should experiment in designing different report(s) to meet your informational needs.
9. Let's experiment. Let's design a report with the following criteria;

Type Type can be ' **Family** ' or ' **Individual** '. Select ' Family '

Date Range if you want say, a Year to Date report,
Click on ' Quick Date Range ', Then select ' Year To Date '

Accessing Giving Statement / Pledge Statement

Scroll down the Giving Statements selection menu using the scroll bar :

- select the slide-bar at the far right,
- press – hold the slide-bar and ' slide ' it to the bottom, and as far as it will go.
- The Giving Statements selection menu will appear as shown.

The screenshot shows a web interface for generating giving statements. At the top right, there is a close button (X) and the text "slide bar is DOWN". A red arrow points from this text to a vertical scroll bar on the right side of the menu. The menu is titled "Giving Statements" and contains several sections:

- Tax Deductible**: A section with the text "You can create giving statements for tax deductible gifts, non-deductible or both." Below this is a dropdown menu currently set to "Both Deductible & Non-Deductible", which is circled in red.
- Include Pledge Information**: A section with the text "You can include a summary of pledge activity in the sidebar. WARNING: Will make statement generation very slow." Below this is a checkbox labeled "Show pledges on giving statement", which is also circled in red.

At the bottom of the menu, there are two buttons: "Cancel" and "Run Report". The "Run Report" button is circled in red.

Tax Deductible ' ▼ '

Select 'Both Deductible & Non-Deductible '

Include Pledge Information

Check mark the box labeled
' Show pledges on giving statement '

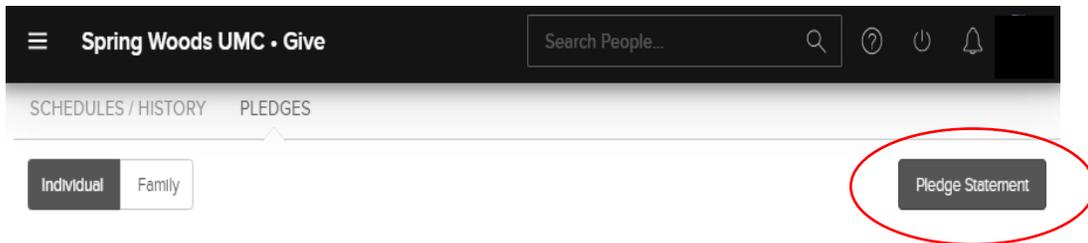
Show pledges on giving statement

Select ' **Run Report** '

Accessing Giving Statement / Pledge Statement

Accessing Your Pledge Statements

1. Follow steps 1 through 4 in the “Accessing Your Giving Statements” instructions.
2. If the words “GIVING STATEMENT” appears inside a black box, on the right side, click the words ' PLEDGES 'until it changes to read “PLEDGE STATEMENT”



3. Select ' Family '.
4. Select ' Pledge Statement ' The “Pledge Statements reports selection menu appears.

Pledge Statements slide bar is UP ✕

COA Category
Choose the Chart of Account (COA) category for your report.

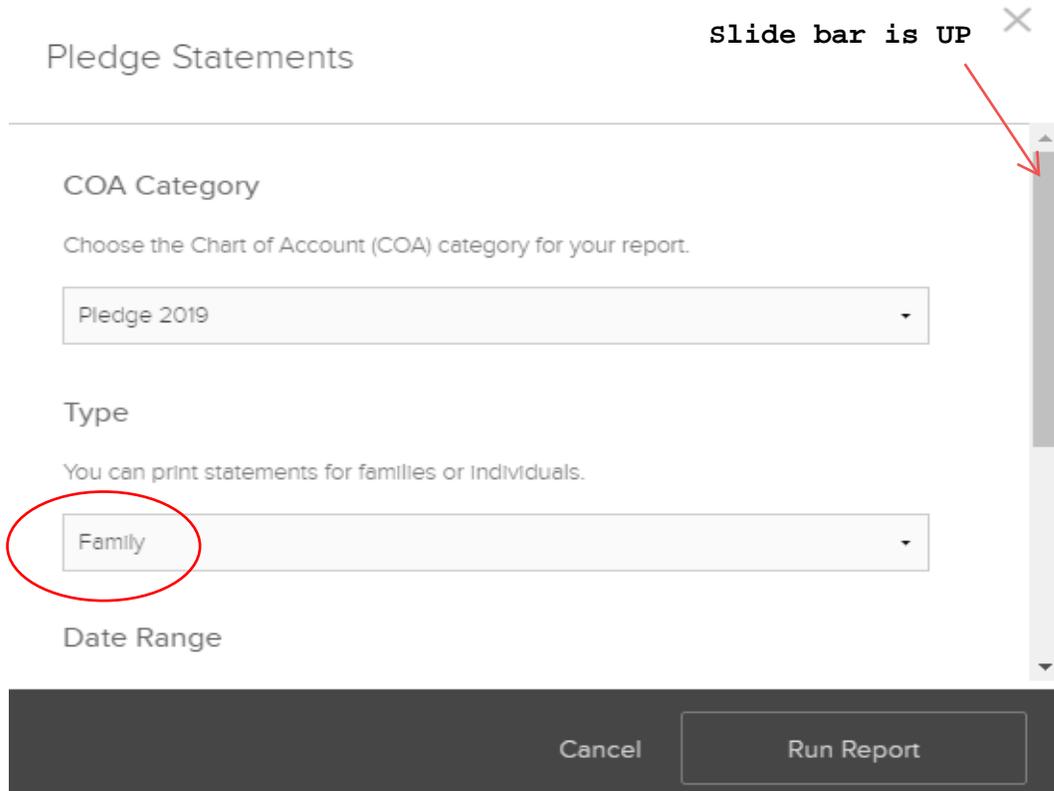
Pledge 2019

Type
You can print statements for families or Individuals.

Family

Date Range

Cancel Run Report

A screenshot of the 'Pledge Statements' selection menu. The menu is titled 'Pledge Statements' and has a close button '✕'. It contains three sections: 'COA Category' with a dropdown menu showing 'Pledge 2019'; 'Type' with a dropdown menu showing 'Family' (circled in red); and 'Date Range'. At the bottom of the menu are two buttons: 'Cancel' and 'Run Report'. A red arrow points to the scrollbar on the right side of the menu, and the text 'slide bar is UP' is written above it.

Accessing Giving Statement / Pledge Statement

- From this selection menu, there are different options for designing a Pledge Statement. As you may have discovered while running a Giving Statement report, you should experiment in designing different pledge report(s) that best meet your informational needs.
- Another experiment. Let's design a report with the following criteria;

COA Category The default is “ Pledge 2019 “.

Type Select ' Family '

Scroll down the Pledge Statements selection menu using the scroll bar :

- select the slide-bar at the far right,
- press – hold the slide-bar and ' slide ' it to the bottom, and as far as it will go.
- The Pledge Statements selection menu will appear as shown.

The screenshot shows a web interface for selecting Pledge Statements. At the top, the text "Pledge Statements" is displayed. To its right, the text "slide bar is DOWN" is written in a bold, black font. A red arrow points from this text to a vertical scroll bar on the right side of the menu. The scroll bar is positioned at the bottom, indicating that the menu has been scrolled down. The menu itself contains a dropdown menu with "Family" selected, which is circled in red. Below the dropdown menu, there is a "Date Range" section with a "Quick Date Range..." dropdown menu and a "Custom Date Range" section with "From" and "To" input fields. At the bottom of the interface, there is a dark grey bar with two buttons: "Cancel" and "Run Report". The "Run Report" button is circled in red.

Accessing Giving Statement / Pledge Statement

Date Range if you want a Year to Date report,
Click on ' Quick Date Range ', Then select ' Year To Date '

Select ' **Run Report** '

Accessing Giving Statement / Pledge Statement

Frequently Asked Questions (FAQ's)

1. On the Giving Statement, what does ' Given All-Time ' mean ?
 - Given All-time is the total of all giving beginning January 1 of the current year,. Please allow up to 2 weeks for recent donations to be audited and posted to their record.
2. I ran a report for Year to Date giving. Why does the report not include our most recent donation ?
 - Givers should allow up to 2 weeks for donations to be audited and posted.
3. My spouse and I make donations from separate checking accounts. Are my donations reported separately from those that are made by my spouse?
 - Yes, that is correct. If each spouse gives, the giving can be reported for each spouse. However, your statement will report all giving from both individuals, IF the option “Family” is selected when setting up your giving statement report.
4. What types of donations to Spring Woods UMC are considered Non-Deductible ?
 - This would include the purchase of books, flowers for church adornment.
5. When I run a report for the period ' Last Year ', my actual donations are itemized, but why is my (our) pledge for last year not shown?
 - Last year, 2018, Spring Woods UMC did not take up pledges. All giving was received as an offering.
6. What is the earliest giving information accessible on-line through CCB?
 - January 1, 2016. Giving information for three (3) full calendar years **prior to** January 1 of the current year will accessible on-line.
7. While looking over a recent report, and comparing it to my records, my report does not show a donation which I made to Spring Woods UMC. Who should I contact?
 - Marge Harrison, Office Manager. Marge can be reached at the church office (281) 444-6468. Be sure to provide copy of canceled check or other validation of payment for the missing item(s).
8. At the bottom of my statement, it states “ Unless otherwise noted, no goods or services were received in return for these contributions”. Would you explain?
 - By IRS definition, charitable contributions represent gifts given without reciprocity. Supporting a charitable organization by buying flowers or other merchandise for worship or church adornment, for example, puts you into the got-something-in-return category. These are shown on the giving statement as a Non-Deductible.
9. I'm planning to travel this year on the mission trip with other Spring Woods UMC members. Is the fee that is charged for travel expenses tax deductible?
 - According to IRS Publication 526, “Generally, you can claim a charitable contribution

Accessing Giving Statement / Pledge Statement

deduction for travel expenses necessarily incurred while you are away from home performing services for a charitable organization only if there is no significant element of personal pleasure, recreation, or vacation in the travel.” You should also check with your tax adviser.