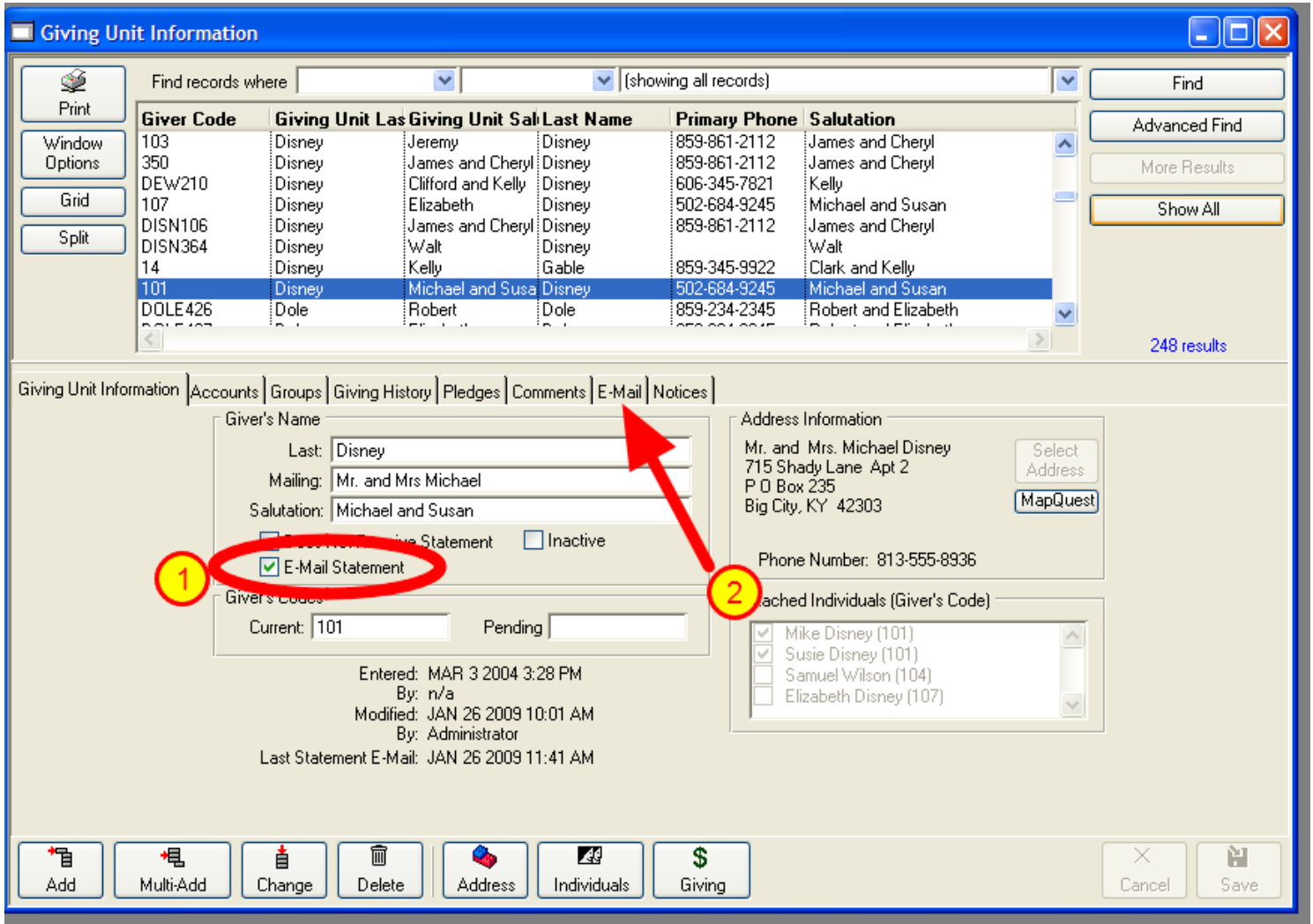


Emailing CDM+ Giving Statements

The ability to send Giving Statements by email is a function added with CDM+ Enhanced Notices. If you do not own CDM+ Enhanced Notices, the following screens will not be available to you. If you would like to purchase CDM+ Enhanced Notices, please call CDM+ Sales at 877-891-4236.

Setting up Giving Unit Record to send Giving Statements by email



The first step is to properly code those giving unit records of those that wish to receive giving statements by email. From the Giving Unit Information window:

1. Check the E-Mail Statement checkbox. This identifies those giving units that will be emailed. It also causes the hardcopy Giving Statement printing to bypass this giving unit.
2. Move to the new E-Mail tab.

Setting up Giving Unit Record to send Giving Statements by email

The screenshot shows the 'Giving Unit Information' window. At the top, there is a search bar and a 'Find' button. Below that is a table of giving units with columns: Giver Code, Giving Unit Las, Giving Unit Sal, Last Name, Primary Phone, and Salutation. The row for '101' is highlighted. Below the table are tabs for 'Giving Unit Information', 'Accounts', 'Groups', 'Giving History', 'Pledges', 'Comments', 'E-Mail', and 'Notices'. The 'E-Mail' tab is active, showing a table titled 'Send e-mail statements to selected emails'. This table has columns: 'Us', 'Family/Individual', 'E-Mail', and 'Notes'. A red circle with the number '2' highlights the 'Us' column checkboxes. At the bottom of the window, there is a toolbar with buttons: 'Add', 'Multi-Add', 'Change', 'Address', 'Individuals', and 'Giving'. A red circle with the number '1' highlights the 'Change' button.

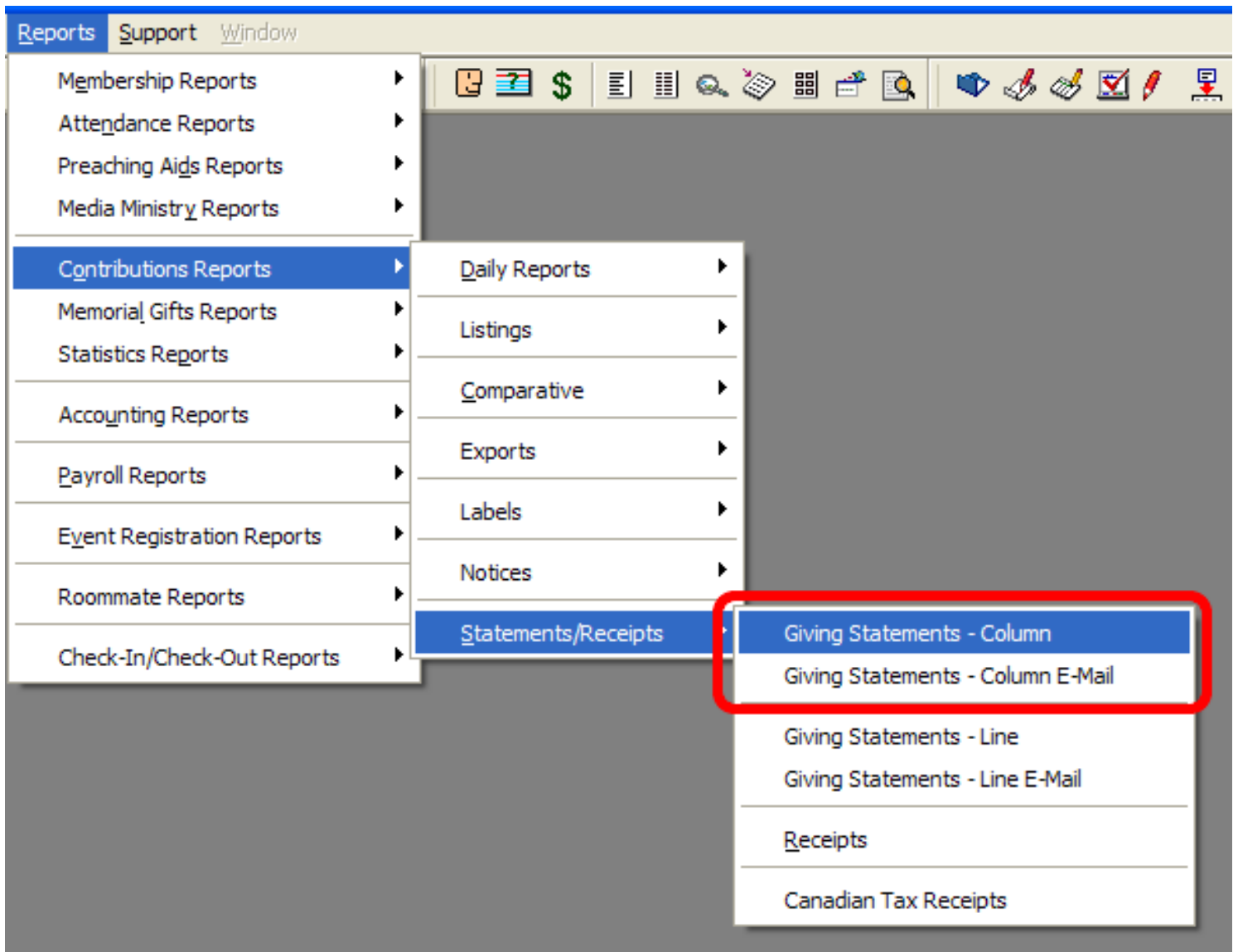
Giver Code	Giving Unit Las	Giving Unit Sal	Last Name	Primary Phone	Salutation
103	Disney	Jeremy	Disney	859-861-2112	James and Cheryl
350	Disney	James and Cheryl	Disney	859-861-2112	James and Cheryl
DEW210	Disney	Clifford and Kelly	Disney	606-345-7821	Kelly
107	Disney	Elizabeth	Disney	502-684-9245	Michael and Susan
DISN106	Disney	James and Cheryl	Disney	859-861-2112	James and Cheryl
DISN364	Disney	Walt	Disney		Walt
14	Disney	Kelly	Gable	859-345-9922	Clark and Kelly
101	Disney	Michael and Susa	Disney	502-684-9245	Michael and Susan
DOLE426	Dole	Robert	Dole	859-234-2345	Robert and Elizabeth

Us	Family/Individual	E-Mail	Notes
<input type="checkbox"/>	Family	susand @ global.net	
<input type="checkbox"/>	Family	steve@cdmplus.com	giving statements
<input type="checkbox"/>	Family	steve@cyber-ras.com	giving statements
<input type="checkbox"/>	Mike Ray	shansen@pclink.com	secondary email
<input type="checkbox"/>	Mike Ray	mike@fcc.org	Bus email
<input type="checkbox"/>	Susie	susandis@adelphia.net	
<input type="checkbox"/>	Susie	susan.d@starbucks.com	Starbucks email
<input type="checkbox"/>	Samuel	sammy@uga.edu	

1. Click the Change button.

2. Check the box beside the email address to which the giving statement should be sent. You may select multiple email addresses for the same giving unit. This allows you to send the giving statement to the giver, his/her accountant, and perhaps his/her caretaker in those situations.

Printing/Emailing Giving Statements

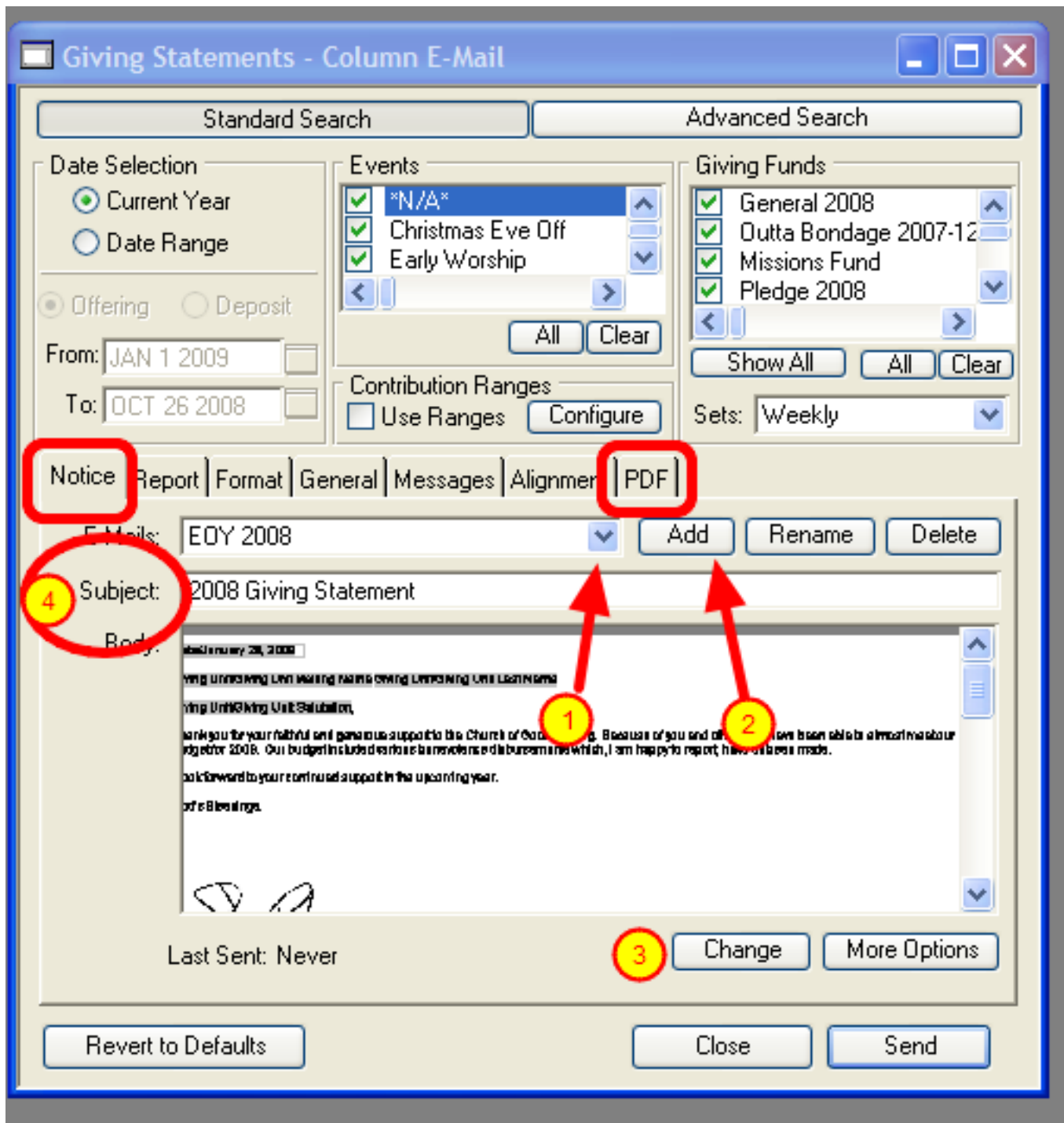


Printing/emailing Giving Statements is a two step process. One step is the hardcopy printing of the giving statements. This hasn't changed, with the exception that the printing process will bypass any giving unit that is flagged to have giving statements emailed.

The other step is to produce the giving statements that will be emailed.

Select the desired menu option.

Printing/Emailing Giving Statements



With the exception of two new tabs - the Notice tab and the PDF tab - the setup window for Email Giving Statements should be familiar.

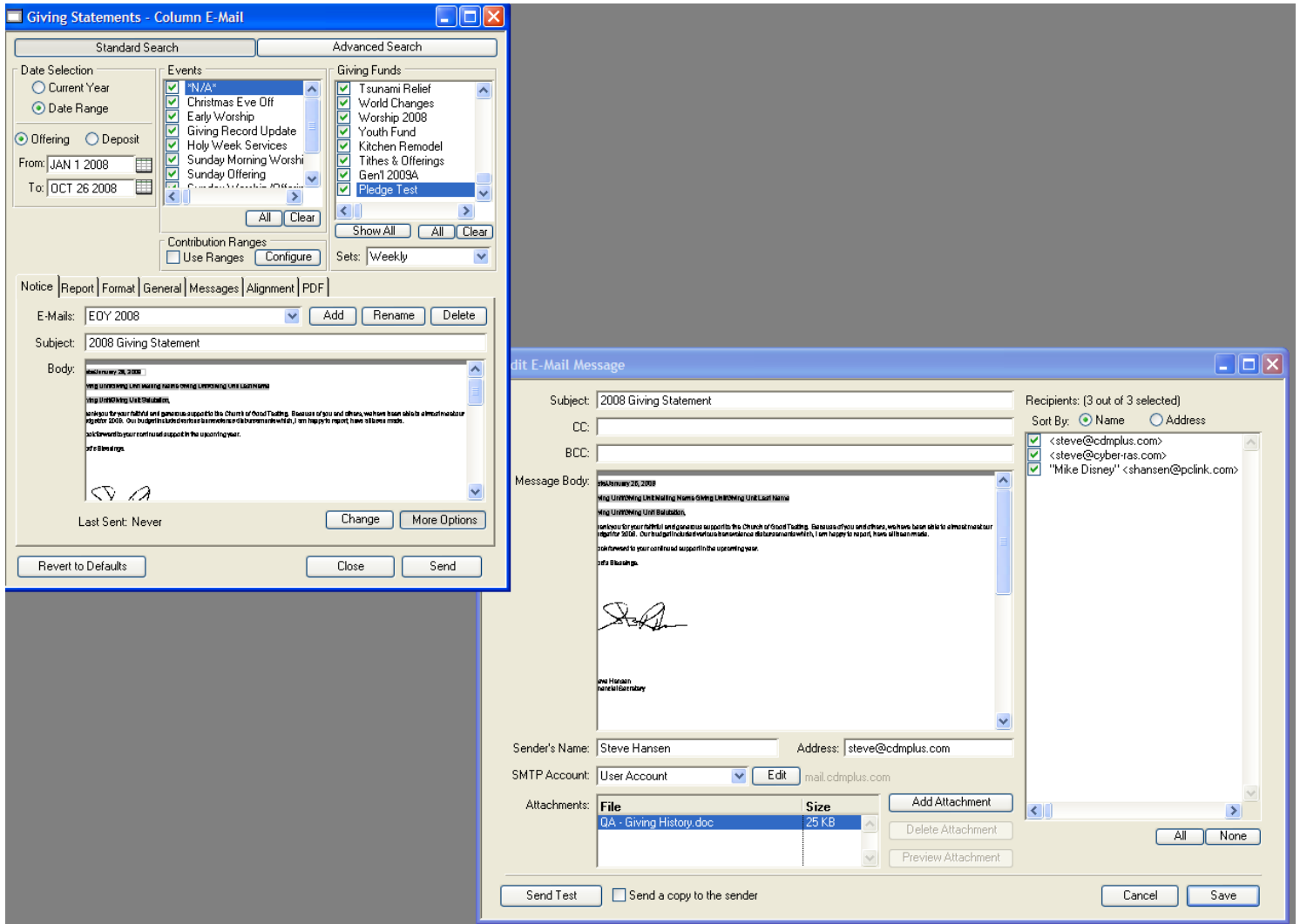
As with the other Notices within CDM+, you may build a library of stored notice templates to use.

1. Press the drop-down arrow to display the available templates or
2. Press the Add button to create a new one.

3. If you select an existing template, press the Change button to move to the editing window.

4. Do not forget to enter a subject line for the email.

Printing/Emailing Giving Statements



Pressing the More Options button opens the Edit E-Mail Message window. Each recipient email address is listed on the right side. You may also add an attachment to the email, perhaps a Word document or another pdf document. These attachments, if any, are in addition to the pdf attachment which is the giving statement.

Composing/Editing Email Message

The screenshot displays the 'Giving Statements - Column E-Mail - EOY 2008' window. The main text area contains a date field set to 'Date/January 26, 2009' and several text fields for personalization: 'Giving Unit/Giving Unit Mailing Name Giving Unit/Giving Unit Last Name', 'Giving Unit/Giving Unit Salutation,', and 'Thankyou for your faithful and generous supportto the Church of Good Testing. Because of you and others, we have been able to almost meet our budget for 2008. Our budgetincluded various benevolence disbursements which, I am happy to report, have all been made.' Below this is 'I lookforward to your continued supportin the upcoming year.' and 'God's Blessings.' A signature graphic is present, followed by the name 'Steve Hansen' and title 'Financial Secretary'. On the right, a 'Formatting Palette' is open, showing font settings for 'Arial' size 9, bold, italic, and underline options, and a list of database fields under 'Giving Unit' including 'Comments', 'Date Entered', 'Date Modified', etc. The bottom of the window has 'Revert', 'Close', and 'Save' buttons.

As with the other Enhanced Notices within CDM+, the composition window allows you to type your email message or copy/paste from some other source. Notice that you can even embed a graphic, such as a signature. Additionally you can embed variable information into each email, such as personalizing with the person's salutation.

Emailing Giving Statements - General Options

The screenshot shows the 'Giving Statements - Column E-Mail' window. The top section is divided into 'Standard Search' and 'Advanced Search' tabs. The 'Standard Search' section includes 'Date Selection' with radio buttons for 'Current Year' and 'Date Range', and 'Offering' and 'Deposit' radio buttons. Below these are 'From' and 'To' date pickers set to 'JAN 1 2008' and 'OCT 26 2008'. The 'Advanced Search' section has three columns: 'Events' with a list of items like '*N/A*', 'Christmas Eve Off', 'Early Worship', etc., and 'Giving Funds' with a list of items like 'Tsunami Relief', 'World Changes', 'Worship 2008', etc. There are 'All' and 'Clear' buttons for each list. Below the 'Advanced Search' section are 'Contribution Ranges' with a 'Use Ranges' checkbox and a 'Configure' button, and a 'Sets' dropdown menu set to 'Weekly'. The bottom section has tabs for 'Notice', 'Report', 'Format', 'General', 'Messages', 'Alignment', and 'PDF'. The 'Report' tab is selected and contains 'Giving Unit Selection' with radio buttons for 'Current Code' and 'Pending Code', and 'From' and 'To' text boxes. Below this are 'Giver Options' with a checkbox for 'Print only Giving Units with a Pledge' and 'Include' with a checkbox for 'Inactive Giving Units'. The 'Report Columns' section has radio buttons for 'Selected Fund Total' and 'Selected Columns', followed by six dropdown menus, all currently set to '*Empty*'. At the bottom are 'Revert to Defaults', 'Close', and 'Send' buttons.

The other tabs and areas on the Giving Statement setup window are identical to their hard copy printed counterparts, except for the new PDF tab at the right.

Emailing Giving Statements - Security

The screenshot shows a software window titled "Giving Statements - Column E-Mail". It features two search tabs: "Standard Search" and "Advanced Search". Under "Standard Search", there are sections for "Date Selection" (with radio buttons for "Current Year" and "Date Range"), "Offering" (with radio buttons for "Offering" and "Deposit"), and "Contribution Ranges" (with a checkbox for "Use Ranges" and a "Configure" button). The "Advanced Search" section includes "Events" and "Giving Funds" lists, each with checkboxes and "All" and "Clear" buttons. Below these are "Sets:" and a dropdown menu set to "Weekly". A tabbed interface at the bottom includes "Notice", "Report", "Format", "General", "Messages", "Alignment", "PDF", "General", "Watermark", "Info", "Viewer", "Outlines", "Compatibility", and "Security". The "PDF" and "Security" tabs are highlighted with red circles. The "Security" tab is active, showing fields for "Owner Password" and "User Password", a checked "Use 128 bit encryption" checkbox, and a "User Permissions" section with several checkboxes: "Printing" (checked), "Print at Full Quality" (checked), "Modifying Content" (unchecked), "Copying Content" (checked), "Form Field Filling" (checked), "Document Assembly" (unchecked), "Form Field Filling and Modify Comments" (unchecked), and "Content Extraction for Accessibility" (checked). At the bottom of the window are buttons for "Revert to Defaults", "Close", and "Send".

Selecting the PDF tab reveals seven additional lower tabs. The Security tab allows you to password protect the pdf attachment which is the Giving Statement. Set the User Password to require the recipient to enter this password in order to view the giving statement. Set the Owner Password to prevent anyone from editing the pdf file.

You might announce in the bulletin or newsletter that the giving statements are being sent out and that the password required to view them is "XXXXXXXX".

Emailing Giving Statements

Giving Unit Information

Find records where [dropdown] [dropdown] (showing all records) [dropdown] Find

Giver Code	Giving Unit	Last Name	Primary Phone	Salutation
350	Disney	James and Cheryl	859-861-2112	James and Cheryl
DEW210	Disney	Clifford and Kelly	606-345-7821	Kelly
107	Disney	Elizabeth	502-684-9245	Michael and Susan
DISN106	Disney	James and Cheryl	859-861-2112	James and Cheryl
DISN364	Disney	Walt		Walt
14	Disney	Kelly	859-345-9922	Clark and Kelly
101	Disney	Michael and Susa	502-684-9245	Michael and Susan
DDLE426	Dole	Robert	859-234-2345	Robert and Elizabeth
DDLE427	Dole	Elizabeth	859-234-2345	Robert and Elizabeth

248 results

Print Window Options Grid Split

Giving Unit Information | Accounts | Groups | Giving History | Pledges | Comments | E-Mail | Notices

Giver's Name
 Last:
 Mailing:
 Salutation:
 Does Not Receive Statement Inactive
 E-Mail Statement

Address Information
 Mr. and Mrs. Michael Disney
 715 Shady Lane Apt 2
 P O Box 235
 Big City, KY 42303
 Phone Number: 813-555-8936

Giver's Codes
 Current: Pending:

Attached Individuals (Giver's Code)
 Mike Disney (101)
 Susie Disney (101)
 Samuel Wilson (104)
 Elizabeth Disney (107)

Entered: MAR 3 2004 3:28 PM
 By: n/a
 Modified: JAN 26 2009 10:01 AM
 Last Statement E-Mail: JAN 26 2009 11:41 AM

Add Multi-Add Change Delete Address Individuals Giving Cancel Save

Finally, after the Giving Statements have been emailed, the date is recorded on the Giving Unit Information window.