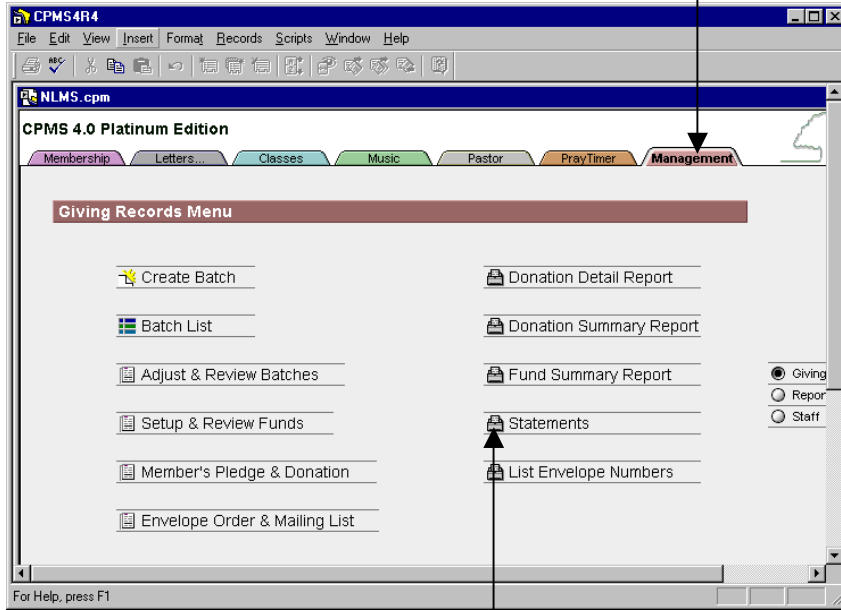


STATEMENTS

From the Management Module:



1. Click on Statements;

The following screen will appear:

2 a. Click in the field of the desired criteria and type the appropriate information. (A date range may be entered in **Date of Donation** field with ... between the dates, i.e.: 1/1/01...1/30/01). Click **Continue**;

b. Click on the Down Arrow for the desired criteria. (More than one criterion can be chosen as long as they are compatible. Such as: Member's Name and Amount). A Drop Down box for each criterion (except Amount explained below) will appear as follows:

3. Date of Donation:

- 4. Click on the date;
- 5. Click on **Paste**;

Envelope No.:

- 4. Click on the Envelope No.; (It will appear in the Envelope No. field);
- 5. Go to Step # 6;

Member's Name:

- 4. Click on the Member's Name; (It will appear in the Member's Name field);
- 5. Go to Step # 6;

Amount:

- 4. Type an amount; The **Amount** field will allow a search of a specific amount, including an amount greater than (>) or less than (<);
- 5. Go to Step # 6;

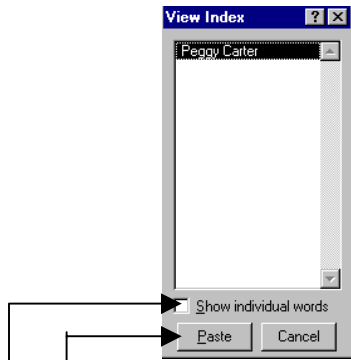
Fiscal Year:

- 4. Click on the Year;
- 5. Click on **Paste**;

Name of Fund:

- 4. Click on the Name of Fund; (It will appear in the Name of Fund field);
- 5. Go to Step # 6;

Entered By:



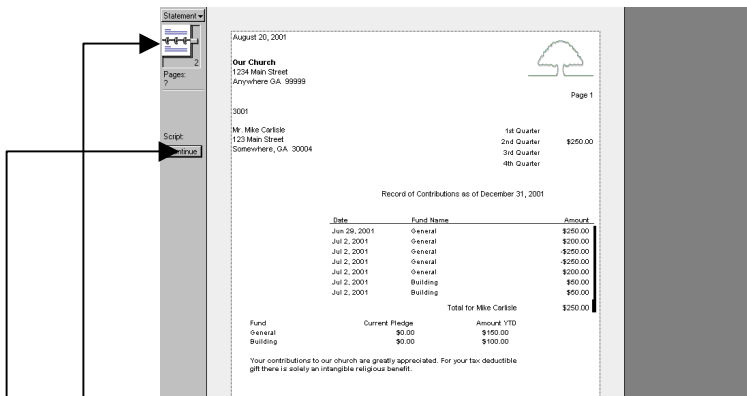
- 4. Click on the Name;
- 5. Click on **Paste**;

(NOTE: If **Show individual words** is checked, one word (name) will appear on each line).

If **Active Fund** is checked, the Funds marked active in **Financial Prefs** in **Setup** ONLY will be available. (Note: A Fund may be a one time or occasional corporate fund (gift, pledge) and would not be checked as an **Active Fund** in **Financial Prefs** in **Setup**).

- Once the desired criterion has been entered;
- 6. Click on **Continue**;

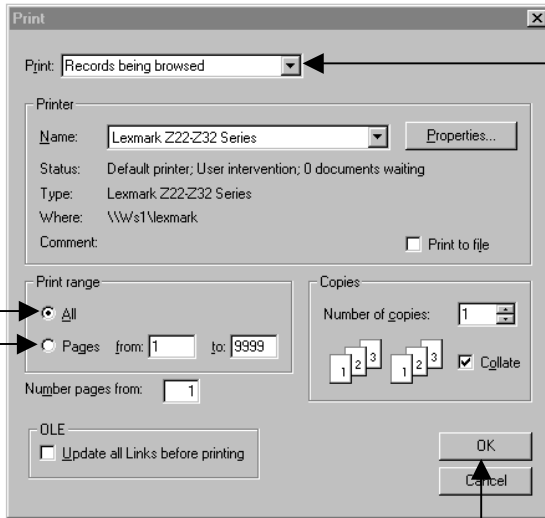
The following screen will appear:



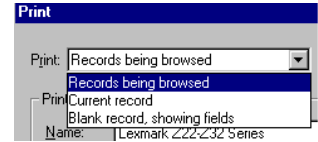
The Statements are formatted and ready to print. Previewing the statements before printing is possible by scrolling through the pages of the Rolodex.

- 7. Click **Continue**;

The following screen will appear:



Click on the Down Arrow for the **Print** field. The following Drop Down box will appear:



Choose **Records being browsed** to print a Statement for all.

Choose **Current record** to print a Statement for the current record only.

Print range should be **All** to print a Statement for all, or Choose the **Page range** to be printed;

8. Click on **OK**;