



Arena Contributions: Best Practices (Course #A216)

Presented by: Staci Sampson
Shelby Contract Trainer

shelby**systems**

©2018 Shelby Systems, Inc.

Other brand and product names are trademarks or registered trademarks of the respective holders.

Objectives

In this session you cover:

- Managing Funds
- Multiple Uses for the Contribution List
- Using the Financial Integration tool to create GL Journal Entries
- Corrections and Refunds
- Reassigning Gifts
- Changing Contribution Dates on Batch entries
- Managing Pledges
- How to Process Non-Cash Gifts
- Using the Five Fund Contribution Statement
- Emailing and Printing Contribution Statements
- Using Honorariums
- Contribution Analysis Report
- *Other Contribution Reports*

Manage Funds

Contributions>Fund Management

General Information	
Active	<input checked="" type="checkbox"/>
Fund Name	MTRIPS
Description	Mission Trips
Online Name	Mission Trips
Tax Deductible	<input checked="" type="checkbox"/>
Allow Pledges	<input checked="" type="checkbox"/>
Start Date	1/1/2015
End Date	12/31/2034
Category	Missions
Default Project	17 - Mission Trip Local/Regional

General Ledger Export (Shelby V5)	
Company #	1
Fund #	1
Bank Account #	10110
Revenue Department #	100
Revenue Account #	41170

1. Entering the **Online Name** allows for this fund to be used on the Arena Web portal available for donors.
2. Date range is important when using pledges. All pledges and gifts need to be within the date range of the fund begin and end date. This is very important with annual budget campaigns that have pre-paid pledges and multi-year giving campaigns.
3. Choosing a **Category** helps with organizing a group of similar funds for running reports and searching for funds.
4. Selecting a **default project** will automatically that project to all gifts when entering data.
5. General ledger information is required when exporting journal entries to the General Ledger.

Using Contributions Lists

Contributions Lists is a great tool for quick searches and on date ranges, all or selected funds, giving types (non-cash, online, etc.) and projects.

The screenshot shows the 'Contribution List' interface. At the top, there is a 'Filter' section with a dropdown arrow. Below this, there are input fields for 'From' (with a date picker set to 1/1/2018), 'Through', 'First Name', 'Last Name', and 'Transaction'. To the right, there are three dropdown menus for 'Fund', 'Type', and 'Project'. The 'Fund' dropdown is open, showing options: 'Missions', 'MTRIPS', '(No Category)', and '1876-Pledge'. The 'Type' dropdown is open, showing options: 'Check', 'Cash', 'E-Check', and 'Visa'. The 'Project' dropdown is open, showing options: 'Memorial Morgan Herman', 'Mission Trip 2013 Guatemala', 'Mission Trip 2013 Guatemala', and 'Mission Trip 2013 Mexico'. A callout box with a black border and white background contains the text: 'Use the filters to do a quick search on giving for any date range and a combination of Funds and Type of Payment.' Below the filter section, there is an 'Apply Filter' button. At the bottom, there are four tabs: 'Contributions', 'Fund Summary', 'Project Summary', and 'Contributors'. Four red arrows point from the 'Apply Filter' button and the four filter dropdowns to their respective tabs.

Results are displayed in 4 methods:

1. **Contributions** > displays every individual gift that matches filters. Notice totals on this tab.
2. **Fund Summary** > Totals for all funds in search results.
3. **Project Summary** > A summary for projects on the filters you specify
4. **Contributors** > Lists all contributors in search with totals for each contributor. Use the column header to sort by gift total.

Contribution List Results

Contributions

Contributions Fund Summary Project Summary Contributors

Contribution Total \$77,580.00
Fund Total \$66,525.00

Show Memo Show Images

<input type="checkbox"/> Transaction Detail	Batch	Contribution Date	Name	Type	Amount	Fund(s)
<input type="checkbox"/> 7842	Test of Project	1/2/2019	Ballou, Bill	Check	\$200.00	BUILD: \$100.00
<input type="checkbox"/> 9152	Test of Project	1/2/2019	Adams, George	Check	\$200.00	BUILD: \$100.00
<input type="checkbox"/> [None]	Test of Project	1/2/2019	Dobson, David	Cash	\$100.00	BUILD: \$50.00
<input type="checkbox"/> 11	[Unnamed Batch]	6/10/2018	Muniz, Elisha	Check	\$200.00	BUILD: \$200.00
<input type="checkbox"/> 201	ISC #1	6/10/2018	Adams, Billy	Check	\$250.00	1876-Pledge: \$250.00
<input type="checkbox"/> 101	ISC #1	6/10/2018	Edwards, Blake	Check	\$250.00	1876-Pledge: \$150.00 BENV: \$100.00

The Contributions tab results display each individual gift and how that gift was distributed in the data entry.

- **Tip:** It is possible to export to excel and do a pivot table on the date range of the gifts.

Fund Summary

Contributions	Fund Summary	Project Summary	Contributors
MTRIPS	\$1,750.00		
1876-Pledge	\$1,025.00		
BENV	\$4,875.00		
BUILD	\$54,050.00		
SCHCOM	\$1,200.00		
EMERG	\$400.00		
GENL	\$3,225.00		
Fund Total	\$66,525.00		

Fund summary gives a total for each fund for the specified date range.

- **Tip:** Use this to help reconcile totals for each fund to their respective GL income accounts.
- **Tip:** Create a special report in the GL for each income account that is linked to a Fund in contributions


Project Summary

Contributions	Fund Summary	Project Summary	Contributors
Mission Trip 2013 Guatemala - MTRIPS		\$1,100.00	
Mission Trip 2014 Africa - MTRIPS		\$600.00	
School Computer Lab - BUILD		\$250.00	
School Computer Lab - SCHCOM		\$1,200.00	
Project Total		\$3,150.00	

Project summary provides the income summary for each project used in contributions.

- **Tip:** Many users create a project code for specific mission trips and connect to Fund as the default project.

Contributors

Contributions	Fund Summary	Project Summary	Contributors		
<input type="checkbox"/> Person	First Contribution	Last Contribution	Contributions	Average Contribution	Fund Total
<input type="checkbox"/>  Glover, Rob	1/14/2018	2/4/2018	3	\$3,333.33	\$10,000.00
<input type="checkbox"/>  Kelly, Andrew	1/14/2018	2/4/2018	3	\$3,050.00	\$9,150.00
<input type="checkbox"/>  Hancock, David Kenneth	1/14/2018	2/4/2018	3	\$2,333.33	\$7,000.00
<input type="checkbox"/>  Krebs, David	1/14/2018	2/4/2018	3	\$1,666.67	\$5,000.00
<input type="checkbox"/>  Johnson, Barbara	1/14/2018	2/4/2018	3	\$1,500.00	\$4,500.00
<input type="checkbox"/>  Luter, George	1/14/2018	2/4/2018	3	\$1,433.33	\$4,300.00

The Fund total groups the total giving by each individual.

- **Tip:** Choose the column header **Fund Total** to sort by largest gifts.

Arena Integration with General Ledger Journal Entry

Contribution > Financial Integration

Take advantage of the integration between Arena Contributions and the General Ledger.

Home > Contributions > Financials Integration

Financials Integration

Enable Financial Integration

Financials URL

API Key

API Secret

ARENA FUND	BANK / INCOME ACCOUNTS
MOVESEA	1-0-10110 ACB operating checking / 1-90-40150 Offering-Missions(unrestricted)
GENERAL	1-0-10110 ACB operating checking / 1-10-40120 Offering-Tithes/nonpledge
BUILDING	1-0-10110 ACB operating checking / 1-10-40180 Building Campaign
17654PLEDGE	1-0-10110 ACB operating checking / 1-10-40110 Offering-Tithes/pledge

- Link funds to the proper **bank account/income account** in the General Ledger
- **Users** between Arena and Financials must be linked.
- **Projects** can also be connected if desired.

Note: Arena support staff have to turn on the **API integration** for this to work.

Batch List

Home / Contributions / Batch List

ID	Batch	Date	Control Amount	Contribution Total	Difference	Contributions	Finalized	Exported	Report	Fund(s)
<input type="checkbox"/>	265 API - Visa_MasterCar	1/7/2019 12:00 AM - 1/8/2019 12:00 AM	\$1.00	\$1.00	\$0.00	1				GENERAL: \$1.00
<input checked="" type="checkbox"/>	272 1st Service	5/13/2018 12:00 AM - 5/15/2018 12:00 AM	\$5,000.00	\$5,000.00	\$0.00	7				BENV: \$400.00 BUILD: \$400.00 SCHCOM: \$600.00 MTRIPS: \$200.00 GENL: \$800.00 187654PLEDGE: \$: 1876-Pledge: \$2,3

Page: 1 of 1 Page Size: 132 Refresh 2 Batch(s)

Finalize and Export

Finalize Batch

Are you sure you want to finalize 1 batch?
[View Batch Report](#)

Post Attendance

Export To Financials

Journal Type

Entry Date

1 First Church

16-17 11 May

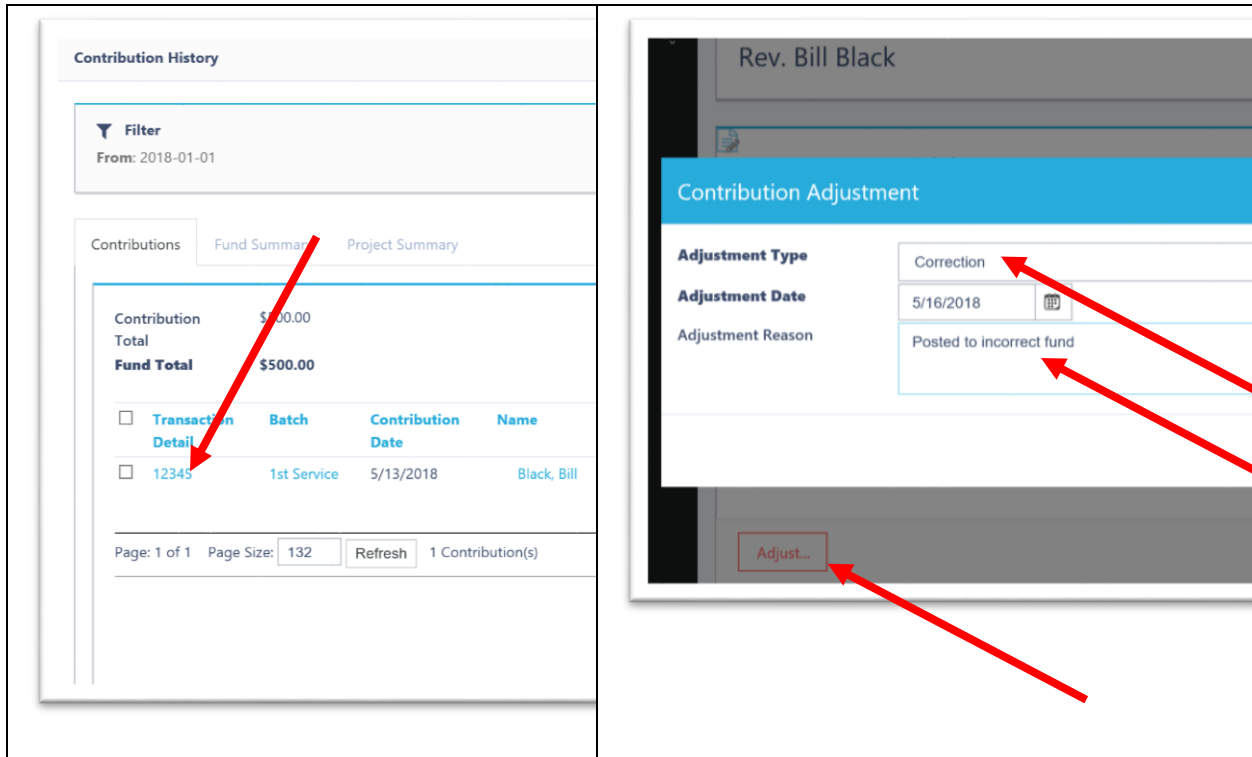
Fund	Bank Account	Income Account	Project	Amount
17654PLEDGE	1-0-10110 ACB operating checking	1-10-40110 Offering-Tithes/pledge		\$5,000.00

OK Cancel

- Select the batch and choose **Finalize and Export**.
- Select **Export to Financials** and make sure to choose **Financials Export (API)** for the journal entry to be created automatically.
- Click OK and then go to the **General Ledger > Manage Unposted Journals** to post the journal entry.
- No import is necessary in the **General Ledger!**

Refunds and Corrections

Person Detail Page > Contributions Tab



Person Detail Page > Contributions Tab > Filter to the date of the gift that required correction. Click on the Transaction Detail to open the adjustment options. Posting this adjustment creates a negative batch in the batch list. Basically it works like the “undo” in V5.

- Decide how to proceed with the correction: Create a new batch with corrections, post the negative due to an NSF, etc. Always consider the impact on the **General Ledger** and the **Bank Reconciliation**.
- Only choose to export to **General Ledger** if necessary.
- Be aware of the dates used on the adjustments and the corrections and what period to post to in the **General Ledger** if exporting to the **General Ledger**.
- Adjustments can also be generated from the **Contribution List**. Search by date and individual and choose the transaction detail to go the entry for the adjustments.
- Use the “Refund” option to initiate an online refund.
- Additional Adjustments Types can be added from **Administration > Lookups**.

Reassign Gift

Person Detail Page > Contributions

Rev. Bill Black Contributions
Home / Membership / White Pages / Rev. Bill Black

Contribution History

Filter

From: 1/1/2018
Through:
Transaction:
Fund: Missions, MTRIPS, (No Category), 1876-Pledge, Check, Cash, E Check

Contribution Total: \$500.00
Fund Total: \$500.00

Table with columns: Transaction Detail, Batch, Contribution Date, Name, Type, Amount, Fund(s)

Transaction Detail	Batch	Contribution Date	Name	Type	Amount	Fund(s)
<input type="checkbox"/>	12345	1st Service	5/13/2018	Black, Bill	Check	\$500.00

1876-Pledge: \$100.00
BUILD: \$300.00
SCHCOM: \$100.00

Page: 1 of 1 | Page Size: 132 | Refresh | 1 Contribution(s)

Reassign Selected Contributions To (not set) ...
Reassign

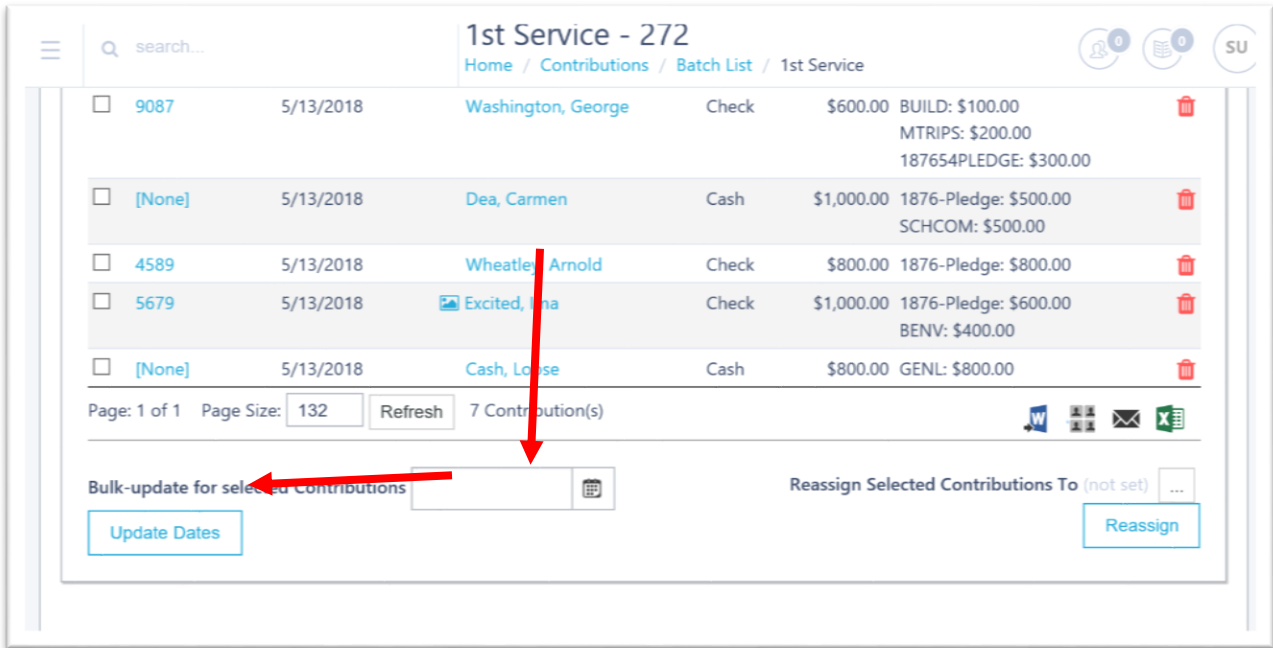
- For deceased spouses, go to the deceased spouse....filter all gifts.....select the surviving spouse.....and then reassign all gifts.
- For corrections (posted to incorrect records), select specific gift and then reassign to the proper person.

Always consider impact on the **General Ledger**. If the gift is to the same fund and just incorrect person, there is no need to export changes to the **General Ledger**.

Change CN Date on Batches

Contributions>Batch List

Go to bottom of options and select “Show Bulk Update” as True.



Open the batch and go to the bottom of the batch to enter new date.

Simply click “update dates” to make the changes.

This is a very helpful tool when all entries in a batch have the incorrect date.

- **Tip:** Go to **Module Settings** --- Contribution List ---- choose allow bulk update to enable this option.

Module Settings

The screenshot shows a web interface for '1st Service - 272'. At the top, there is a search bar and navigation links: Home / Contributions / Batch List / 1st Service. Below this, a summary section shows 'Contribution Total' and 'Fund Total' both at \$5,000.00. A table of contributions follows, with columns for Transaction Detail, Contribution Date, Name, Type, Amount, and Fund(s). One entry is visible: Transaction 12345, dated 5/13/2018, for 'Black, Bill' with a check amount of \$500.00. A dropdown menu is open on the right, listing options: Refresh Cache, My Details, Module Settings (highlighted with a red arrow), and Print Page.

The Contribution List module settings need to be updated to see this date change option.

Open the batch > **Choose Module Settings on the top right of page** > **Select Contribution List.**

The 'Module Settings' dialog box is shown. It has a blue header with the title 'Module Settings' and a close button. Below the header, there is instructional text: 'Choose the module to change settings, choose your settings, click save and repeat. Once you have corrected all the settings, click done.' A 'Module' dropdown menu is present, with 'Contribution List' selected and highlighted by a red arrow. Below the dropdown, the text 'Contribution List (Contributions/ContributionList.ascx)' is visible.

Go to bottom of options and select "Show Bulk Update" as True.

The settings panel shows two options. The first is 'Show Bulk Update', with a description: 'Flag indicating if the Bulk Update panel should be visible to those with permission'. The radio button for 'True' is selected, indicated by a red arrow. The second option is 'Show Honorarium Filter', with a description: 'Enables honorarium filter'. The radio button for 'False' is selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

- **Tip:** Check with the Arena Administrator if module settings are not option. Access to settings may be restricted in the security role settings.

Pledges

Contributions > Quick Pledge Entry

The screenshot shows the 'Pledge Quick Entry' interface. At the top, there is a search bar and a breadcrumb trail: Home / Contributions / Pledge Quick Entry. Below the search bar, the 'Name' field contains 'Bill Black'. An 'Apply Filter' button is visible. A table lists search results with columns for Name, Address, and Home Number. The first result, 'Bill Black' at '6476 Stone Lake Dr' with home number '(901) 234-5678', is selected. The 'Pledge Details' section contains the following fields: 'Fund' (1876-Pledge, highlighted with a red arrow), 'Start Date' (1/1/2018), 'End Date' (12/31/2018), 'Amount' (\$ 1000.00), and 'Frequency' (Once a Month). 'Save' and 'Cancel' buttons are at the bottom.

Search for the pledger and enter Fund, Date Range, Amount, and Frequency.

Pledges can also be added from the Person Detail Page > Contributions

******TIP: Gifts to Pledges have to be within the date range of Pledges to reduce the Pledge balance. Therefore always ensure the date range of the Pledge will encompass all anticipated gifts. This is very important when dealing with "Pre-Paid" Pledges**

Pledge Giving & Comparison Report

Contributions>Reports>

Run Date: 5/16/2018
Time: 3:53 PM

Fund Pledge and Giving Comparison Report

1876-Pledge between 1/1/2018 and 12/31/2018

Donor	ID	Env. #	Phone	Pledge Amount	Pledge Due	Pledge Due % Paid	Previous Pledge Giving	Current Pledged
Adams, Billy	6		(901) 756-4242				\$0.00	
Black, Bill	127		(901) 234-5678	\$1,000.00	\$365.38	27.36 %	\$0.00	\$
Dea, Carmen	1738			\$400.00	\$146.15	273.68 %	\$0.00	\$

Upload this report from the Hub. This report is very similar to the Pledge File Analysis report in V5.

It includes the options to choose to Funds and run the comparison report.

- **Tip:** Note the option to update the results with a Personal Tag.

Non-Cash Gifts

Contribution Data Entry > Choose Payment Type: NON-CASH.

Enhanced Contribution Entry

Bill Black | ID 127

Person Black, Bill
Family Black Family

Spouse *Dortha Black*
Contributes Individually
6476 Stone Lake Dr
Bartlett, TN 38135-2578
(901) 234-5678

Date 5/14/2018
Type Non-Cash
Check #
Amount \$ 5,000.00
Memo 100 shares of IBM 5/1/18

Non-Cash (#273)

Control Amount \$5,000.00
Amount Entered \$0.00
Difference (\$5,000.00)
Contributions 0

Edit Batch + New Contribution

Use the Memo field to give a brief description of the gift. Stock gifts are among the most common non-cash gifts to a church.

Fund Information

Fund	Amount	Project	Honorary	Pledge Information
1876-Pledge	\$ 5,000.00	Project	Honorary	Total Balance \$1,000.00 (\$900.00)
Total	\$ 5,000.00			

Add Fund Line Show All Funds + Add Mission Trip

Previous Next Cancel Save Batch

Choose the Fund and enter the determined amount. If the donor has a pledge, the pledge balance will be reduced by the amount entered with the gift. Unlike V5, a dollar amount can be entered with all non-cash gifts whether or not they have a pledge.

When running the **Five Fund Giving Statement**, all non-cash amounts and memos will be displayed in a **Non-Cash** section of the statement. **These gifts will not be included as tax-deductible gifts.**

Five Fund Statement Results

Contributions > Reports > ContributionStatementFiveFund

From Date	1/1/2018	To Date	12/31/2018	View Report
Campus	All	Fund Category	No Fund Category, Tithes, Missi	
Column 1 Fund(s)	1876-Pledge	Column 1 Label	2018 Pledge	
Column 2 Fund(s)	BUILDING	Column 2 Label	Time to Build	
Column 3 Fund(s)	No Fund Selection	Column 3 Label	Default Label	
Column 4 Fund(s)	No Fund Selection	Column 4 Label	Default Label	
Column 5 Fund(s)	No Fund Selection	Column 5 Label	Default Label	
Use Column Labels in Fund Summary?	No	Identify Funds by	Fund Name	
Minimum Gift	0.01	Include Pledgers with No Gifts?	<input checked="" type="radio"/> True <input type="radio"/> False	
Sections to Include	Tax-Deductible Gifts, Non-Tax-	Include Donors with No Address?	No	
Sort	Bulk Mail Sequence	Adjustment Types to Print		
Donor Name Format	First Names & Titles	Chapter	0	
Person ID	NULL			

The **Five Fund Contribution Statement** is extremely versatile. Connect each Column to a specific fund(s) that require one column to display all gifts to that fund(s).

After selecting columns to specific fund(s), leave the other column options as is. All other gifts will be displayed in an **“Other Funds”** section.

Note the Sections to Include. This option allows for **Non-Cash, Pledge Summary, and Fund Summary** to be displayed. Also note options for **names, sort order, adjustment types**.

Five Fund Statement

Contribution Statement for Rev. Bill Black				Giving from 1/1/2018 to 12/31/2018 Total Tax-Deductible Gifts: \$500.00		
Tax-Deductible Gifts						
Date	2018 Pledge	Time to Build	Other Funds	Check / Trans. #	Gift Total	
5/13/2018	\$100.00		BUILD \$300.00 SCHCOM \$100.00	12345	\$500.00	
Total:		\$100.00	\$400.00		\$500.00	
Non-Cash Donations						
Date	Fund	Description			Amount	
5/14/2018	1876-Pledge	100 shares of IBM 5/1/18			\$5,000.00	
					Total: \$5,000.00	
Pledge Summary						
Fund	Pledge Amount	Prior Year	Current Year:	Cash	Non-Cash	Balance
1876-Pledge	\$1,000.00	\$0.00		\$100.00	\$5,000.00	\$0.00
Fund Summary						
Fund			Non-Cash	Cash	Total	
1876-Pledge			\$5,000.00	\$100.00	\$5,100.00	
BUILD			\$0.00	\$300.00	\$300.00	
SCHCOM			\$0.00	\$100.00	\$100.00	
Total:			\$5,000.00	\$500.00	\$5,500.00	

Tax-Deductible Gifts > Lists each individual Tax-Deductible gift. The total is displayed on the banner.

Non-Cash Donation Summary > Provides the Non-Cash info, but the amount is not included in the Tax-Deductible amount.

Pledge Summary > Provides the Non-Cash amount and reduces the pledge balance.

Fund Summary > Provides a summary for each Fund where the donor contributed.

Email Statements

Person Detail > Contribution Information

The screenshot shows a web interface for a user named Rev. Bill Black. The page title is 'Contribution Information'. The form contains the following fields and values:

Last Contribution Date	5/14/2018
Contribute Individually	<input checked="" type="checkbox"/>
Print Statement	<input type="checkbox"/>
Email Statement	<input checked="" type="checkbox"/>
PIN	2345
Envelope Number	Assign
Contributions Note	<input type="text" value="Contributions Note"/>

At the bottom of the form are 'Save' and 'Cancel' buttons. Two red arrows in the image point to the 'Email Statement' checkbox and the 'PIN' input field.

Email Statements have to be checked. Enter a **PIN** number on each record. This is normally the last 4 digits of home phone. The user can update this.

For new users, you can run a list for all records with email addresses and bulk update all records with a **PIN** number and **EMAIL Statement YES**.

The **PIN** number is a merged field in the email that goes out with the statement. This allows the user to see the actual **PIN** to open the statement.

Note: The Contribution Email Statement set-up is under Administration > System Emails.

Administration > System Emails

System Emails
System E-mails

Manage System Templates
Select the email you wish to modify. Leaving an empty From/From Email will result in the default organization setting email.

Type

Communication Content

HTML Message Plain Text Message

Use this HTML editor to format your email message.

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, table, table border, link icon, unlink icon, table icon, table border icon, and Ω.

A Size Merge Fields

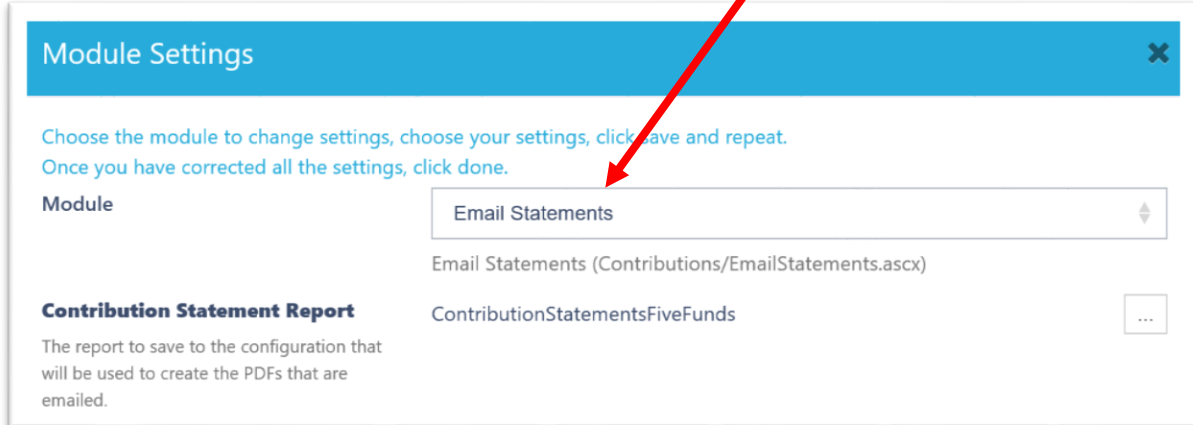
##FullName##,
Thank you for your gifts.
Password to open your statement: ##Pin##

Use this template to write your email and insert merge fields.

Note: The PIN# number merge field. This will allow the donor to see the PIN# upon receipt.

Verify with your Arena Administrator that the Send Statements Agent is running.

Contributions > Email Statements



Module Settings

Choose the module to change settings, choose your settings, click save and repeat.
Once you have corrected all the settings, click done.

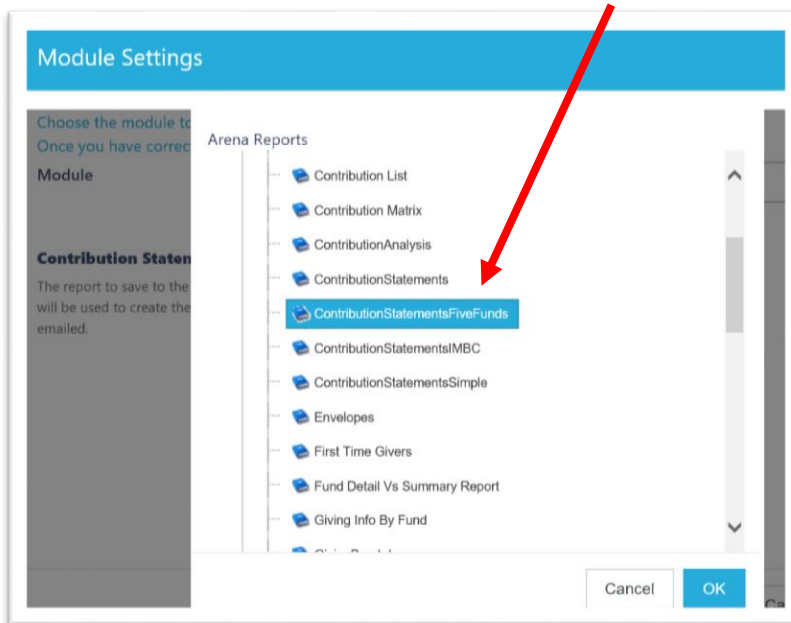
Module: Email Statements

Email Statements (Contributions/EmailStatements.ascx)

Contribution Statement Report

The report to save to the configuration that will be used to create the PDFs that are emailed.

ContributionStatementsFiveFunds



Module Settings

Choose the module to change settings, choose your settings, click save and repeat.
Once you have corrected all the settings, click done.

Module: Email Statements

Contribution Statement Report

The report to save to the configuration that will be used to create the PDFs that are emailed.

Arena Reports

- Contribution List
- Contribution Matrix
- ContributionAnalysis
- ContributionStatements
- ContributionStatementsFiveFunds**
- ContributionStatementsIMBC
- ContributionStatementsSimple
- Envelopes
- First Time Givers
- Fund Detail Vs Summary Report
- Giving Info By Fund

Cancel OK

Choose Module Settings to connect a specific statement format to the Email statement module. This will be the statement format that is delivered as an attached PDF document. The contribution statement should be set up with default columns and can be edited in the Reporting Services Report Manager.

The Filter by Date will honor the Date Range selected. If not, the statements will be Year-to-Date automatically.

Note: Fund 1 and 2 in the Email Statement options are not applicable if using the 5 Fund statement format as the connected report.

Email Statements
Configures Contribution Statements to be delivered by Email

List of People: All People

From Date: 1/1/2018

To Date: 12/31/2018

Minimum Gift: \$

Filter Amounts By Date:

Include Pledge Without Gift:

Fund 1: 1876-Pledge



Fund 2: BUILD

Send Emails

The default recipients are records with the minimum gifts that have “Email Statement” checked with a PIN# and valid email address. In addition, a specific group of people can be selected by using a List.

Print Statements

Person Detail > Contribution Information

Contribution Information		
Last Contribution Date	5/13/2018	
Contribute Individually	No	
Print Statement	Yes	
Email Statement	Yes	
PIN		
Envelope Number	8 (Not Included)	
Contributions Note		

Print Statement needs to be checked.

Contributions > Reports > Five Fund Contribution Statement

From Date: 1/1/2018 To Date: 12/31/2018 View Report

Campus: All Fund Category: No Fund Category, Tithes, Missi...

Column 1 Fund(s): 1876-Pledge Column 1 Label: 2018 Pledge

Column 2 Fund(s): BUILDING Column 2 Label: Time to Build

Column 3 Fund(s): No Fund Selection Column 3 Label: Default Label

Column 4 Fund(s): No Fund Selection Column 4 Label: Default Label

Column 5 Fund(s): No Fund Selection Column 5 Label: Default Label

Use Column Labels in Fund Summary?: No

Identify Funds by: Fund Name

Minimum Gift: 0.01 Include Pledgers with No Gifts? True False

Sections to Include: Tax-Deductible Gifts, Non-Tax-L... Include Donors with No Address? No

Sort: Bulk Mail Sequence Adjustment Types to Print: [Empty]

Donor Name Format: First Names & Titles Chapter: 0

Person ID: NULL

All records with Print Statements will print for distribution. Notice the **“Adjustments Types to Print”**. This allows the use to choose not to print any or selected adjustments only.

To send Print Statements to a select group of people, “register” the Five Fund Statement to the Person list in **Report Registrations under Administration**. This will allow the user to select a specific group of people in lists and then print the statements.

Note: You may need to see your Arena Administrator to register the report. Make sure to remove the statement registration after printing the statements.

Honorariums

The screenshot shows a 'Fund Information' form. A red arrow points to the 'Honorarium' dropdown menu. The form includes fields for Fund (1876-Pledge), Amount (\$ 5,000.00), Project (Project), and Honorarium (Honorarium). A 'Total' row shows \$ 5,000.00. On the right, 'Pledge Information' shows a Total Balance of \$1,000.00 and a current balance of (\$900.00). Buttons for 'Add Fund Line', 'Show All Funds', '+ Add Mission Trip', 'Previous', 'Next', 'Cancel', and 'Save Batch' are visible.

Check **Module Settings** on Contribution Data Entry to ensure the Honorarium/Memorial Option is available. You can create Honorariums/Memorials under **Contributions > Honorariums**.

From Date: 1/1/2018 To Date: 12/31/2018 View Report

Honorarium(a): John Doe Memorial Included Information: Overall Statistics, Giving Details

Page Break between each Honorarium?: No Add Personal Tag to Donors: None Selected

Report Date: 5/18/2018 Report Time: 2:56 PM

Honorarium Information

For giving between 1/1/2018 and 12/31/2018

John Doe Memorial						
Total Received	Gift Count	Last Gift Date				
\$200.00	2	May 13, 2018				
Donor Name	Donor Address	Home Phone	Cell Phone	Gift Date	Gift Amount	
Black, Bill	6476 Stone Lake Dr Bartlett, TN 38135-2578	(901) 234-5678		5/13/2018	\$100.00	
Sampson, Staci				5/13/2018	\$100.00	

The **Honorarium Report** is available to upload from the **Arena Hub**. Use the **Export to Excel** option to delete the amount column if necessary.

Contribution Analysis Report

ContributionAnalysis - Internet Explorer
 https://at01.myshelby.org/ReportView.aspx?reportpath=%2fAT01%2fArenas%2fContributions%2fContributionAnalysis&reportTitle=ContributionAnalysis

From Date: 1/1/2018 To Date: 12/31/2018 View Report

Fund(s): 1876-Pledge Group Gifts By: Individual Gifts

Include Giving Type(s): Cash Gifts Include on Report: Individual Donor Statistics, Donor

Report By: Individual Donor Minimum Single Gift: 0.01

Minimum Gift Total: 0.01 Maximum Gift Total: 9999999.99

Minimum Gift Count: 1 Maximum Gift Count: 999

Minimum Pledge Total: 0 Maximum Pledge Total: 9999999.99

Sort by: Descending Giving Total Number Of Summary Brackets: 20

Summary Sequence Type: Logarithmic Progression Add Personal Tag to Selected Donors: None Selected

Contribution Analysis Report
 for giving between 1/1/2018 and 12/31/2018 Page 1

Person ID	Donor Name	Main Phone	Pledge	Giving Total	Gift Count	Gift Average
734	Wheatley, Arnold		\$0.00	\$800.00	1	\$800.00
720	Excited, Ima		\$0.00	\$600.00	1	\$600.00
	Adams, Billy	(901) 756-4242	\$0.00	\$500.00	2	\$250.00
738	Dea, Carmen		\$400.00	\$500.00	1	\$500.00

Upload this report from the **Hub**. Like the Pledge and Comparison report, this report allows for placing donors in a **Personal Tag**. Very similar to Contribution Analysis report in V5.

Include on Report > note the giving summary and **Giving by Generation**.

The Report Results come in 3 sections.

Giving by person.

Run on 5/18/2018		Contribution Analysis Report					Page 1
for giving between 1/1/2018 and 12/31/2018							
Person ID	Donor Name	Main Phone	Pledge	Giving Total	Gift Count	Gift Average	
1734	Wheatley, Arnold		\$0.00	\$800.00	1	\$800.00	
1720	Excited, Ima		\$0.00	\$600.00	1	\$600.00	
6	Adams, Billy	(901) 756-4242	\$0.00	\$500.00	2	\$250.00	
1738	Dea, Carmen		\$400.00	\$500.00	1	\$500.00	

Summary Total and breakdown by Dollar Range (80/20 rule).

Run on 5/18/2018		Contribution Analysis Report	
for giving between 1/1/2018 and 12/31/2018			
Summary:			
Total Dollars Given:		\$3,225.00	
Average Gift:		\$356.25	
Average Total Giving:		\$403.13	
Number of Individuals		8	
Total Number of Gifts:		10	
Pledge Total:		\$1,400.00	

Giving by Generation

Run on 5/18/2018		Contribution Analysis Report			Page 3
for giving between 1/1/2018 and 12/31/2018					
Giving by Generation					
Generation (Birth Years)	Count of Individuals	Percent Of Individuals	Total Giving	Percent of Giving	
1 No Date of Birth on File	5	62.50%	\$2,375.00	73.64%	
2 Baby Boomers (1943 - 1965)	1	12.50%	\$100.00	3.10%	
3 Generation X (1966 - 1985)	2	25.00%	\$750.00	23.26%	

Helpful Reports from Arena Hub

- **Top Givers** – run to get a multi-year comparison
- **Giving Breakdown** – breaks giving down by age and postal code.
- **Giving by Fund** – Totals for all Funds
- **Fund List** – Lists active status and GL links for all funds.

Q&A

Class Discussion

ISC | 2018

INTERNATIONAL SHELBY CONFERENCE 🎵 MEMPHIS, TN

Staci Sampson
Shelby Contract Trainer
Staci.Sampson@shelbyinc.com



Staci began working with Shelby Arena software as a Project Manager at Faith Assembly of God in Peru, Illinois. From there she became an Independent Arena Trainer for the Illinois District Council of the Assemblies of God. Along with working for the IDCAG, she is now a Shelby Contract Trainer for Arena and ShelbyNext. Staci enjoys supporting churches and the growth of their ministries through training and education of the software.