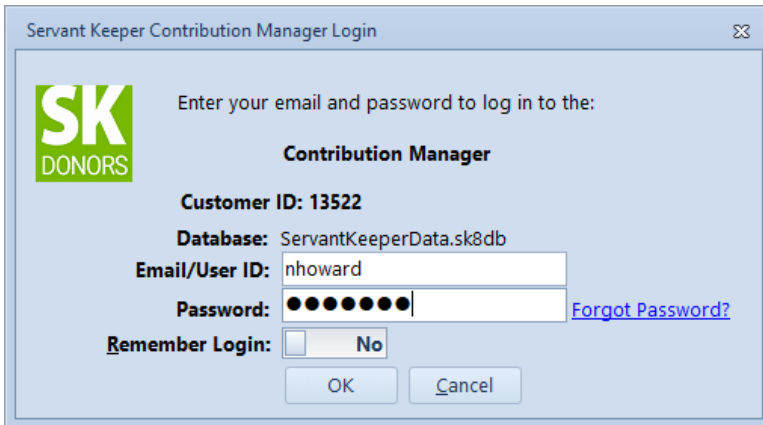


Sending Giving Statements by Email

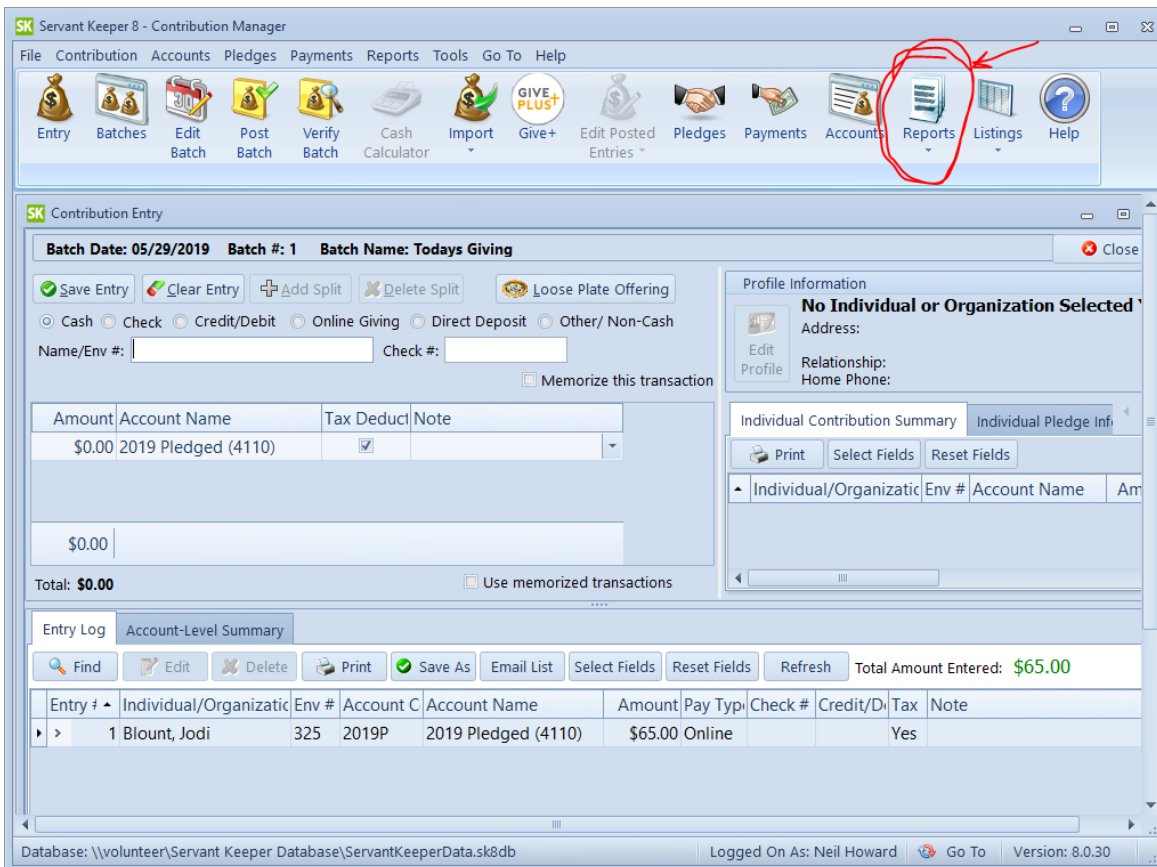
When a person elects to have their quarterly giving statement emailed to them, the selection must be checked in their Servant Keeper record. Once this is done, they will appear in the "Email Statement = YES" group which is used by Servant Keeper to provide names and email addresses of recipients to which quarterly giving statements will be emailed. This procedure assumes that the person's record has already been updated in Servant Keeper Membership Manager to reflect their preference for receiving a statement by email.

Below are the steps in Servant Keeper Contribution Manager to Send a giving statement by email.

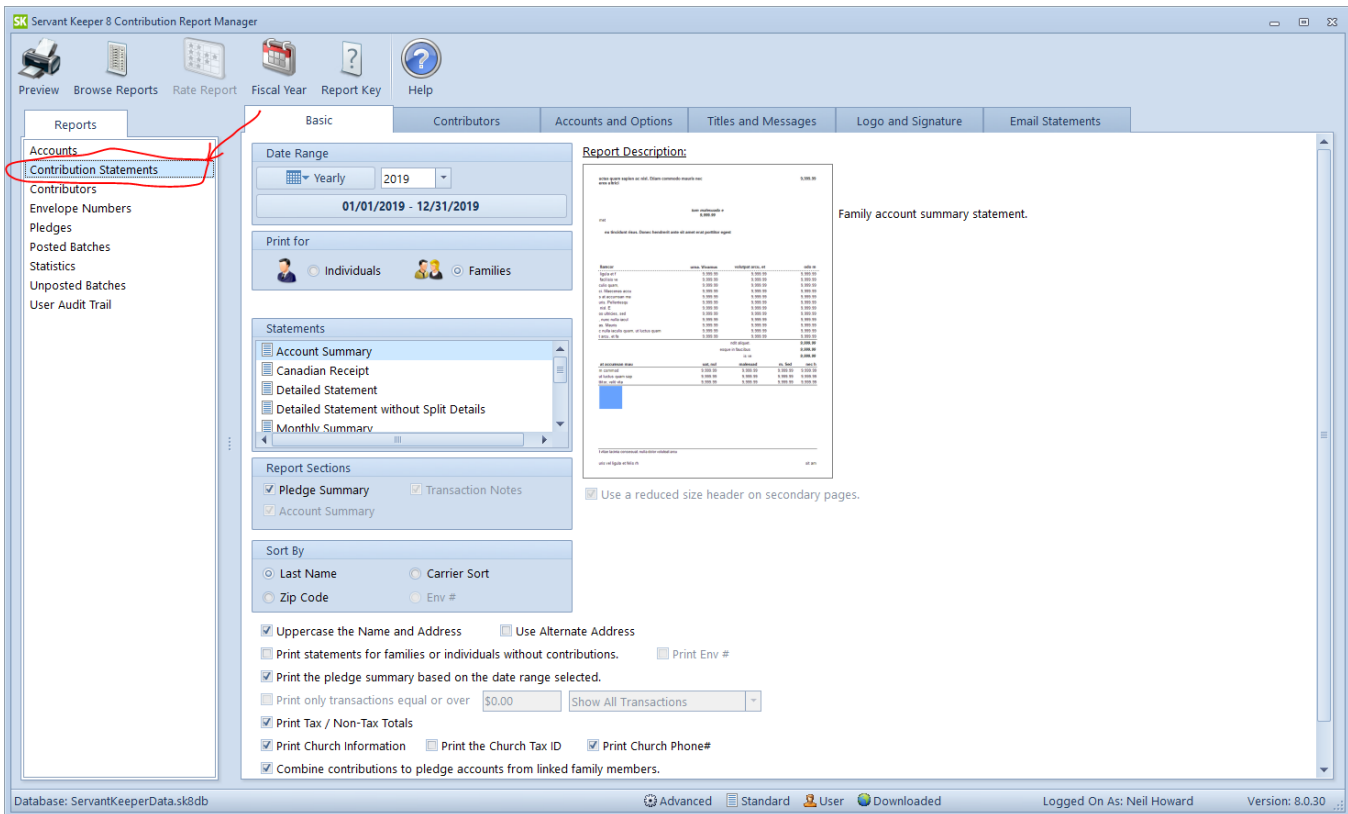
1. Log in to Servant Keeper Contribution Manager.



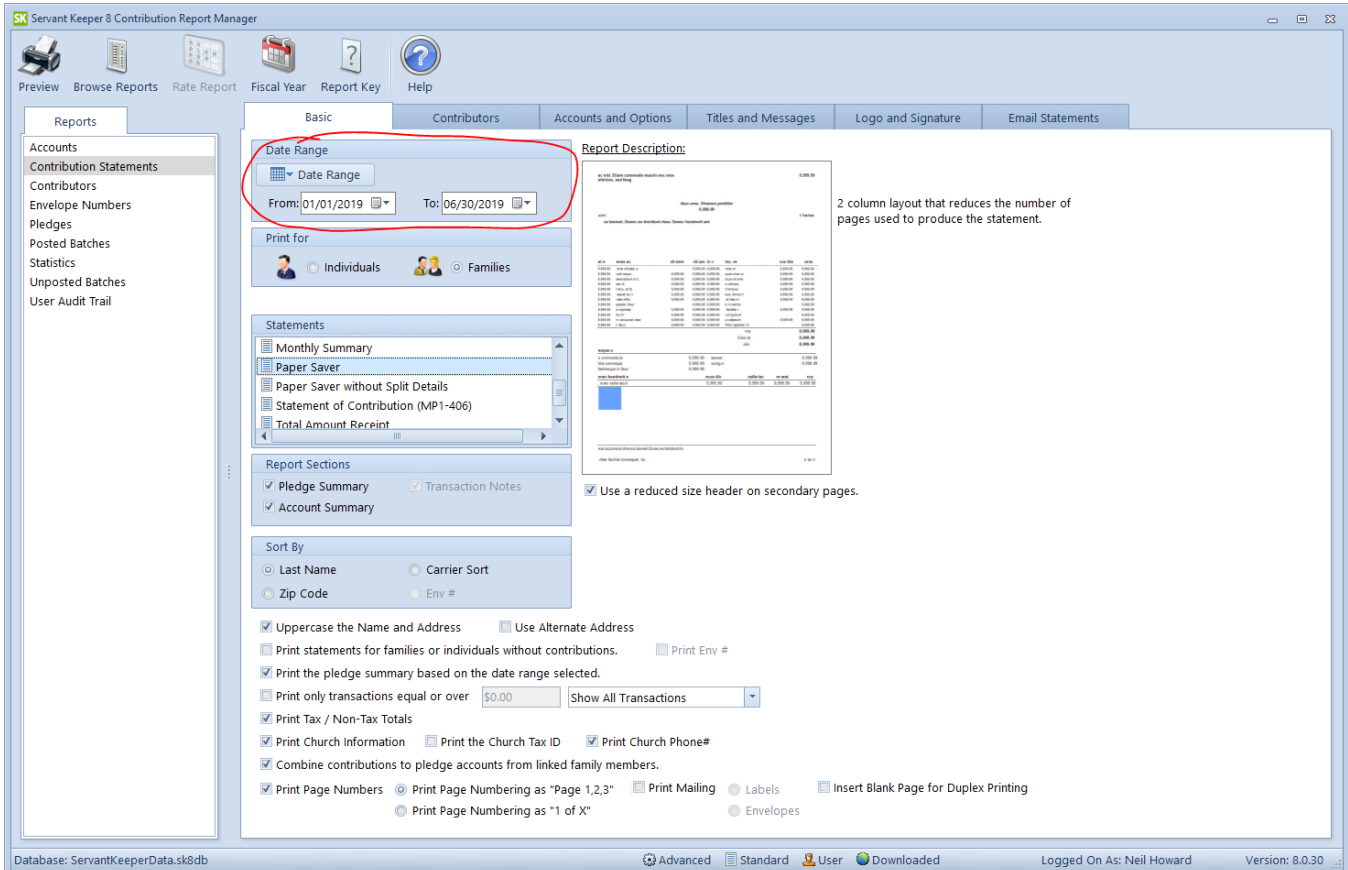
2. Select the Reports icon from the top menu bar



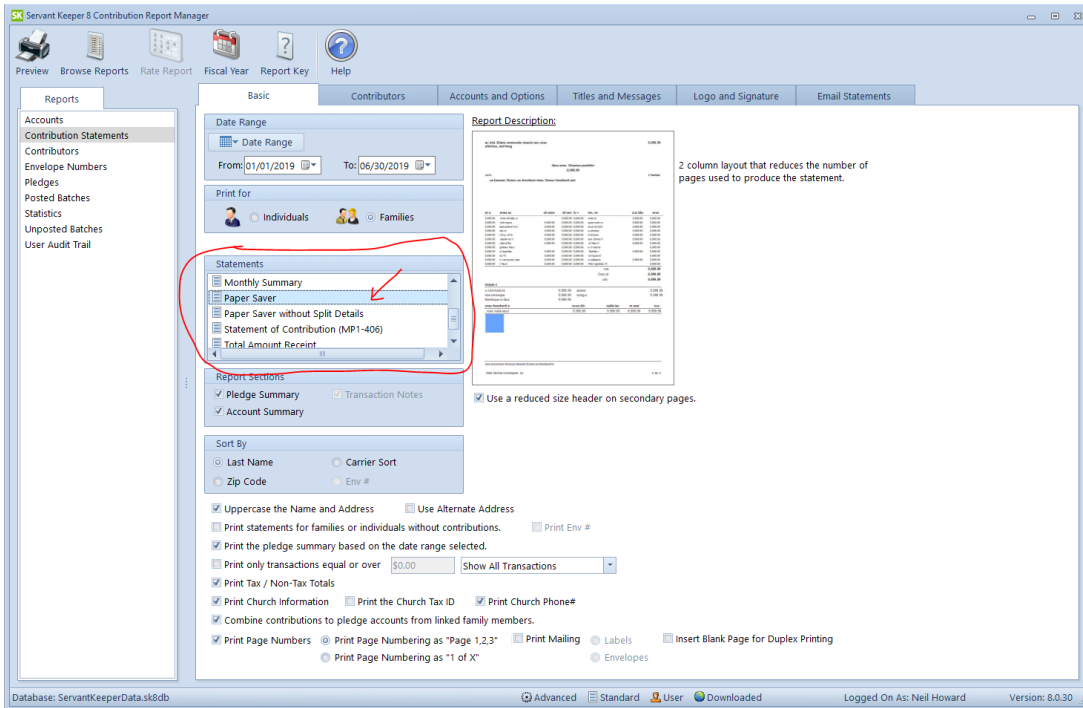
3. Contribution Statement report in the report column



4. On the Basic tab, set the date range to be covered in the giving statement.

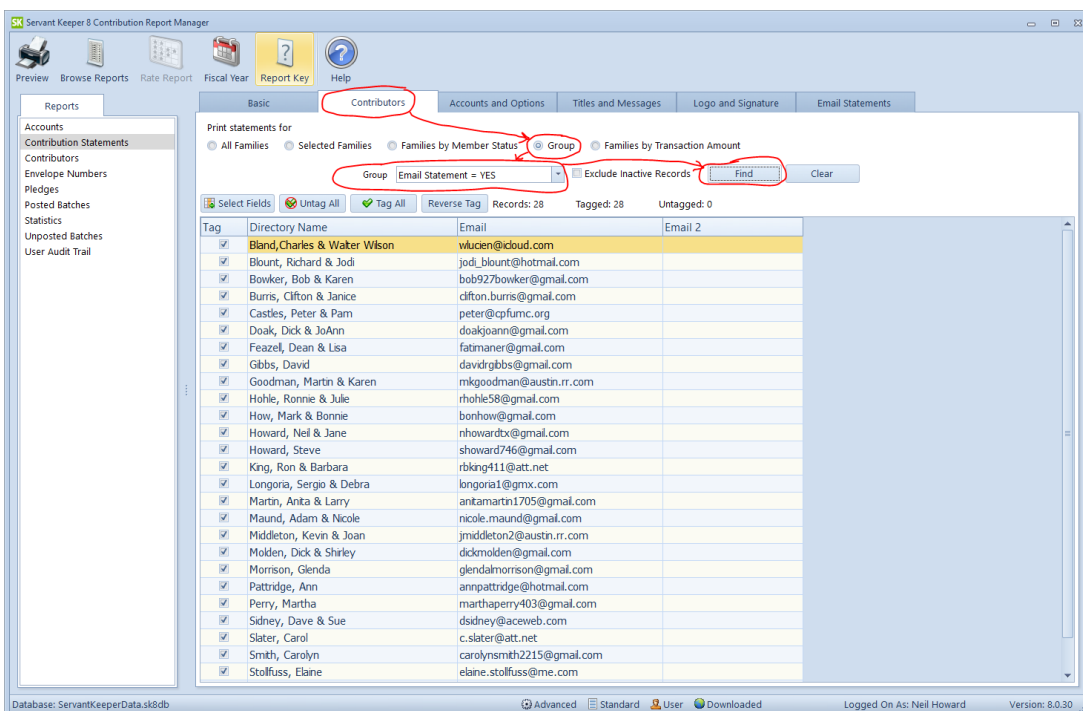


- Select the Statement type. There are 9 options for this. A good one is “Paper Saver,” but any one of these report styles can be selected. All recipients will receive the same type as the one you select. Check the Pledge Summary and Account Summary boxes to include pledging and giving data by account name. Leave all the other checkboxes at their default selections unless you want to change them.



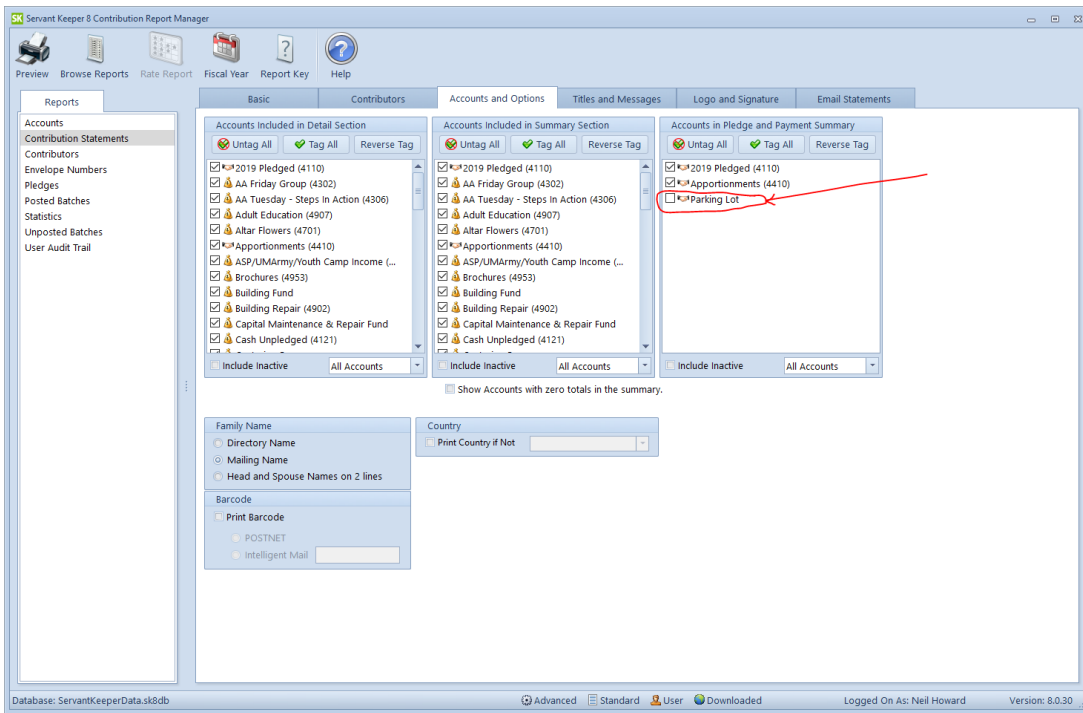
- Click on the **Contributors** Tab and select the Group radio button. Use the Group pull-down menu to select the “Email Statement = YES” group and click on the **Find** button.

This will generate the list of all families who have selected to have their giving statement to be delivered as a PDF file email attachment.

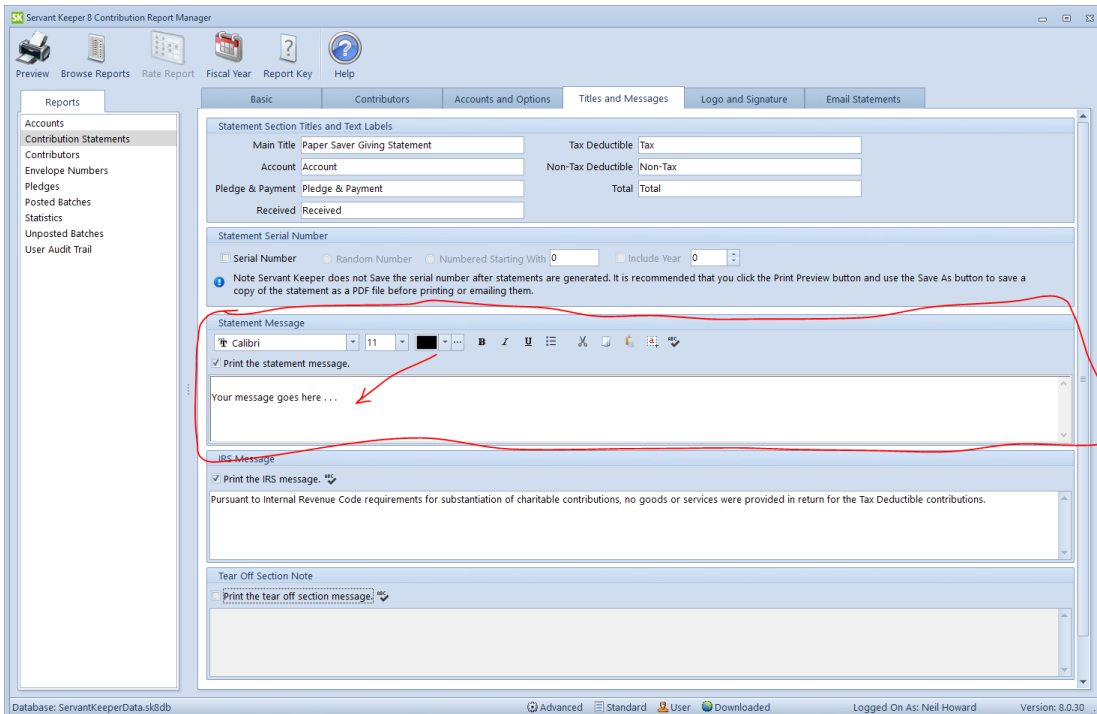


7. **Click on the Accounts and Options tab.** All of the giving accounts in Servant Keeper are selected by default. These accounts will be considered when generating the giving statements for the persons.

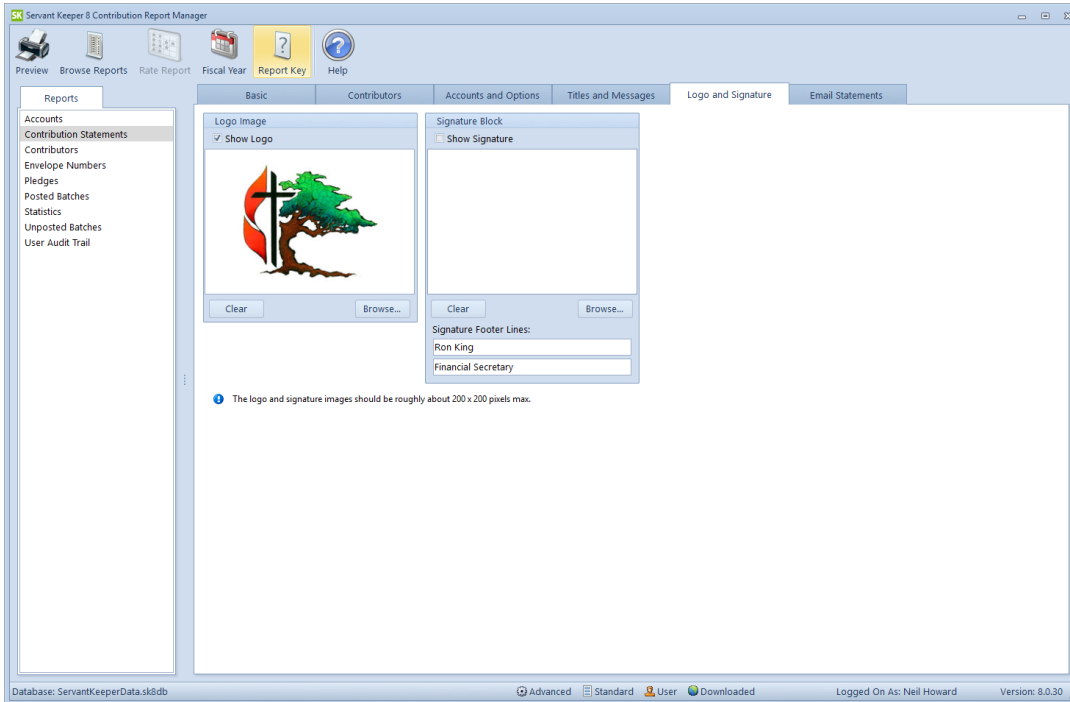
You should probably uncheck the Parking Lot pledge account in the third column since that pledge campaign ended in 2017 and is no longer active. Any contributions to the parking lot account since 2017 are used to pay down our TMF mortgage.



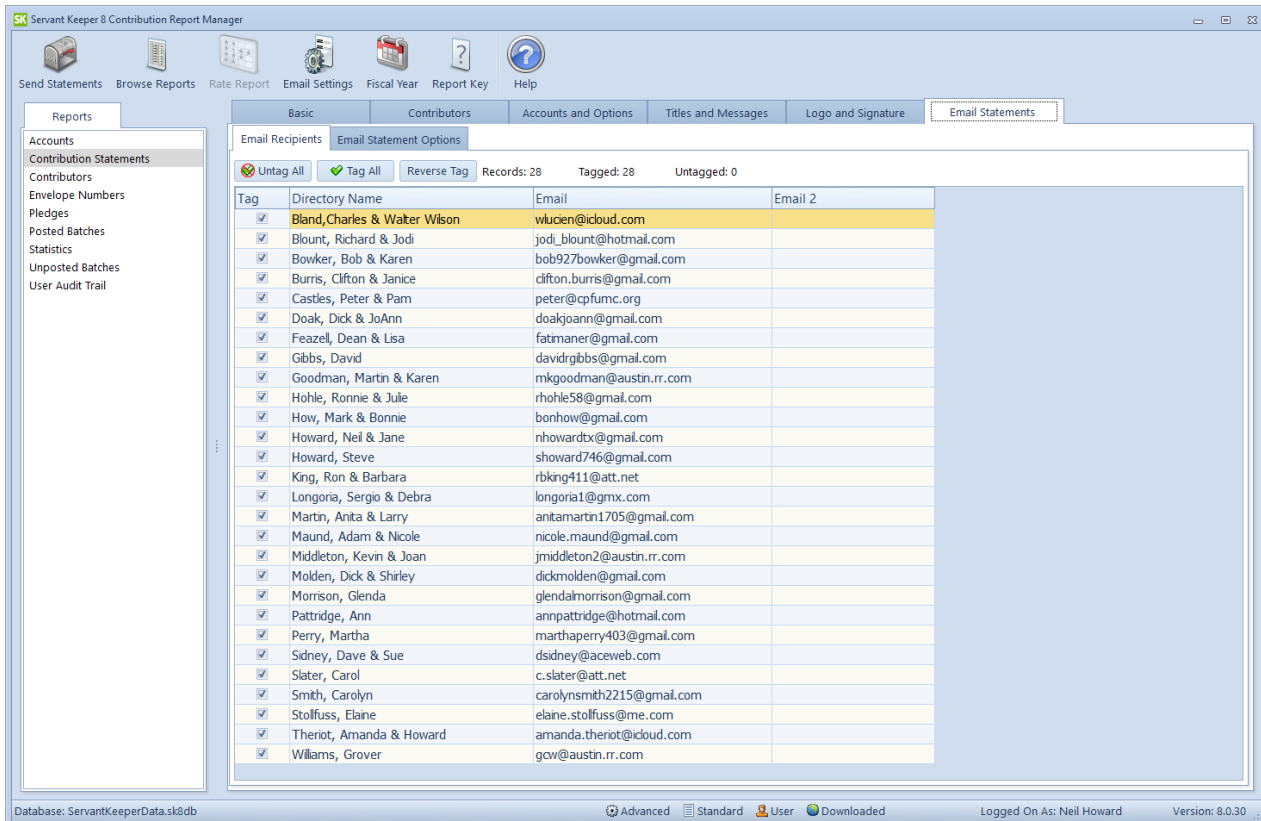
8. **Click on the Titles and Messages tab.** If you have a special Statement Message to be sent as part of the giving statement, add it in the Statement Message box.



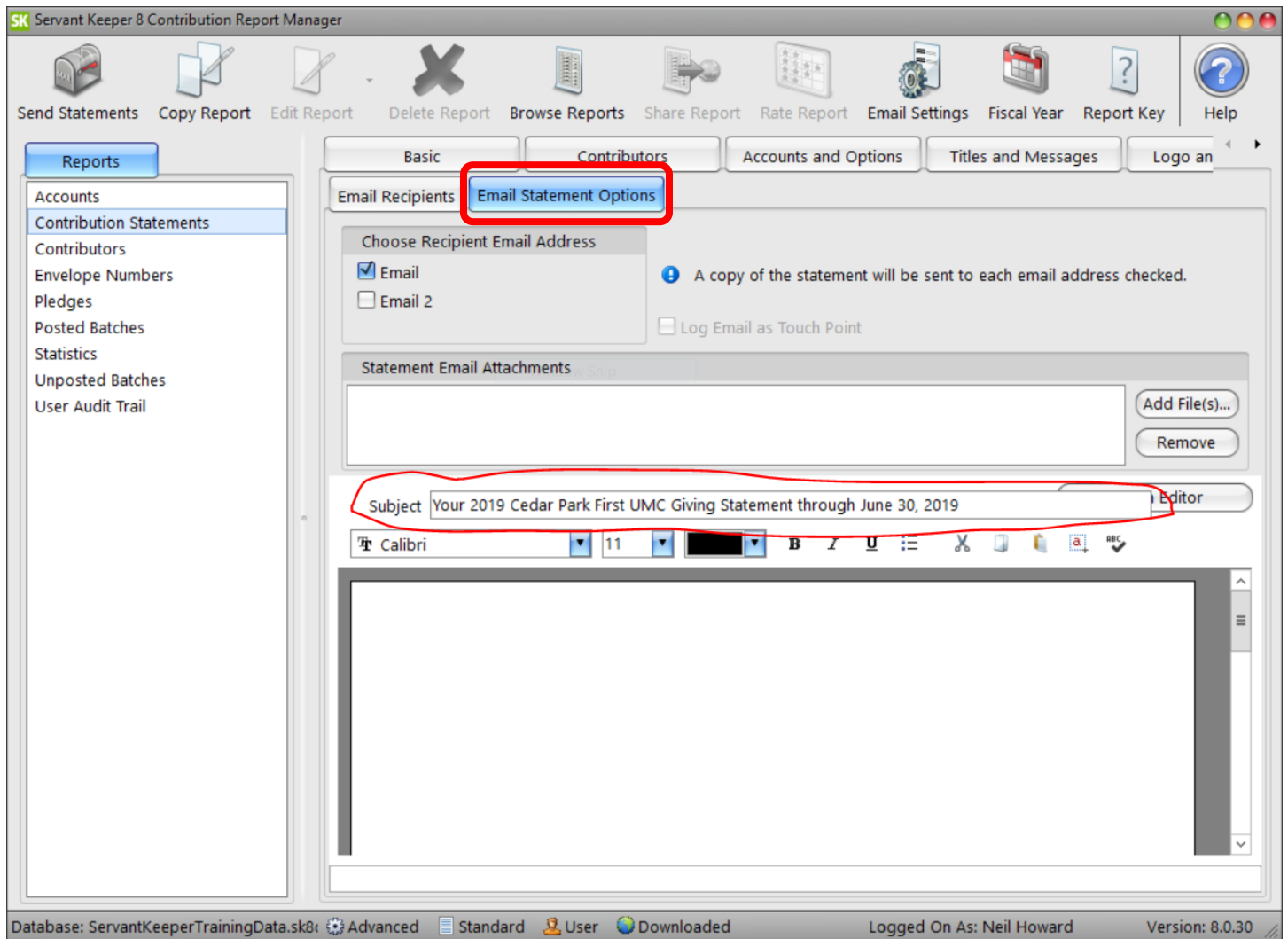
9. Click on the Logo and Signature tab. The CPFUMC logo has already been added. The signature of the Financial Secretaries can also be added, if desired.



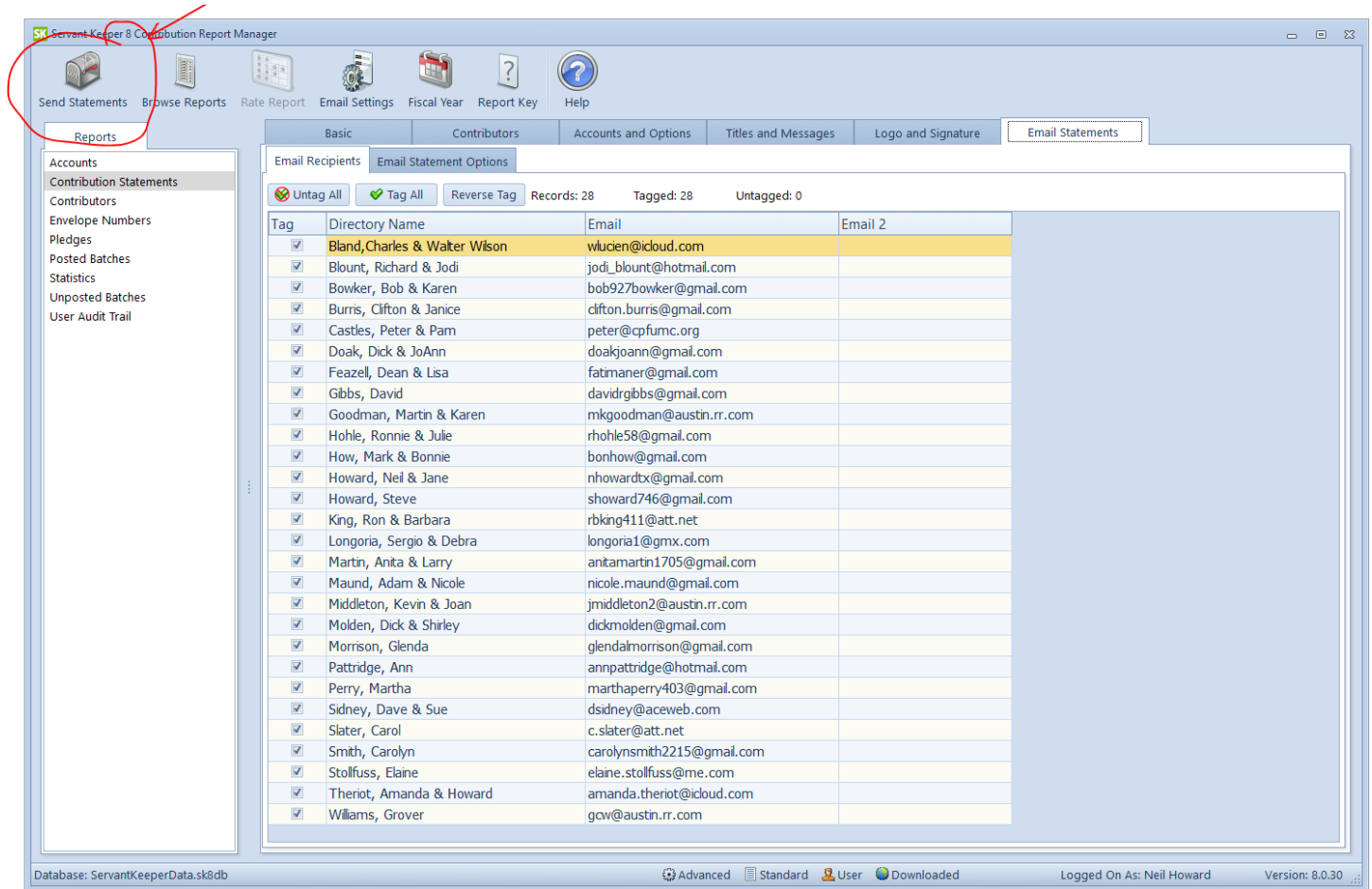
10. Click on the Email Statements tab, check the boxes for all the persons for whom you wish to generate and send giving statements.



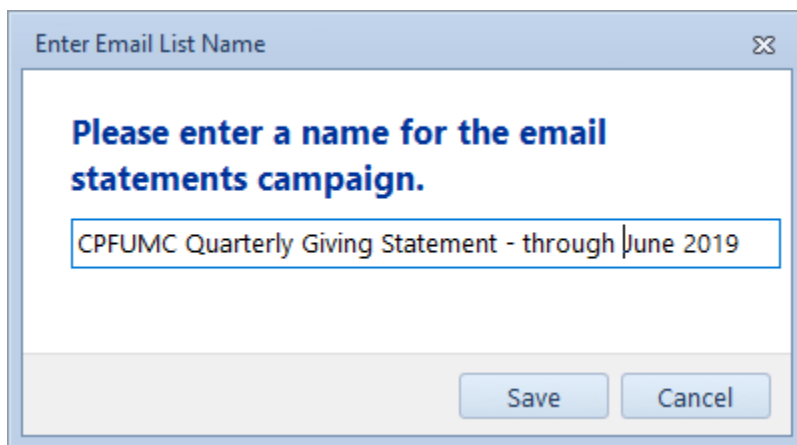
You can use the **Email Statement Options** sub-tab to add additional file attachments to the email (in addition to the giving statement itself) and you can compose a cover letter or memo. The **Subject** field can be filled in. This will be the Subject field of the emails you send out.



11. To generate and send the selected giving statement to the group of persons selected, **click on the Send Statements menu icon** in the upper LH corner of the screen.



A screen will pop up allowing you to identify the group of statements being sent.



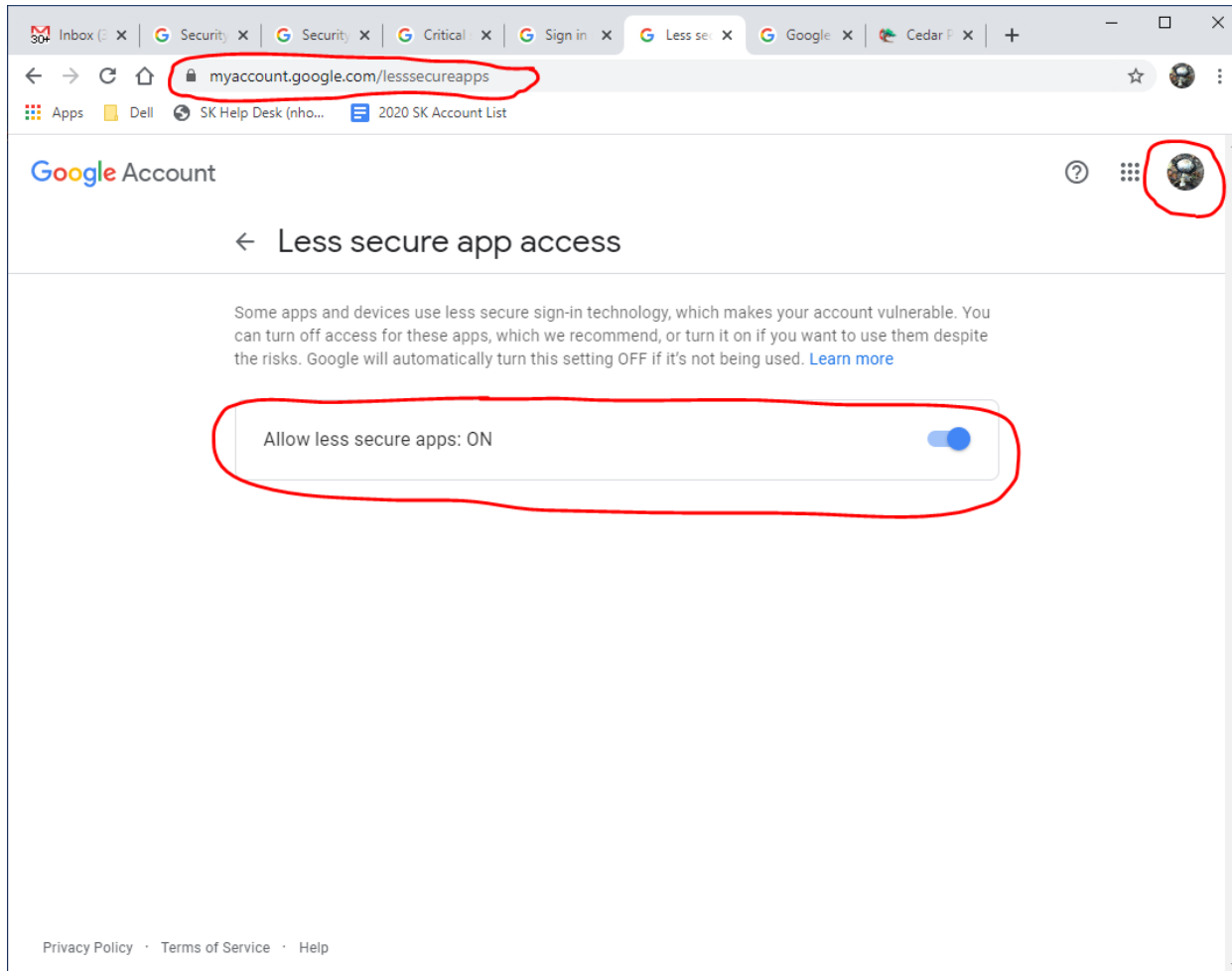
Click Save. The list and a preview of the set of giving statements to be emailed will be generated and shown.

12. Open up a web browser, log in with the CPFUMCFinSec Google account using the credentials (userID, password) that you have. Then go to

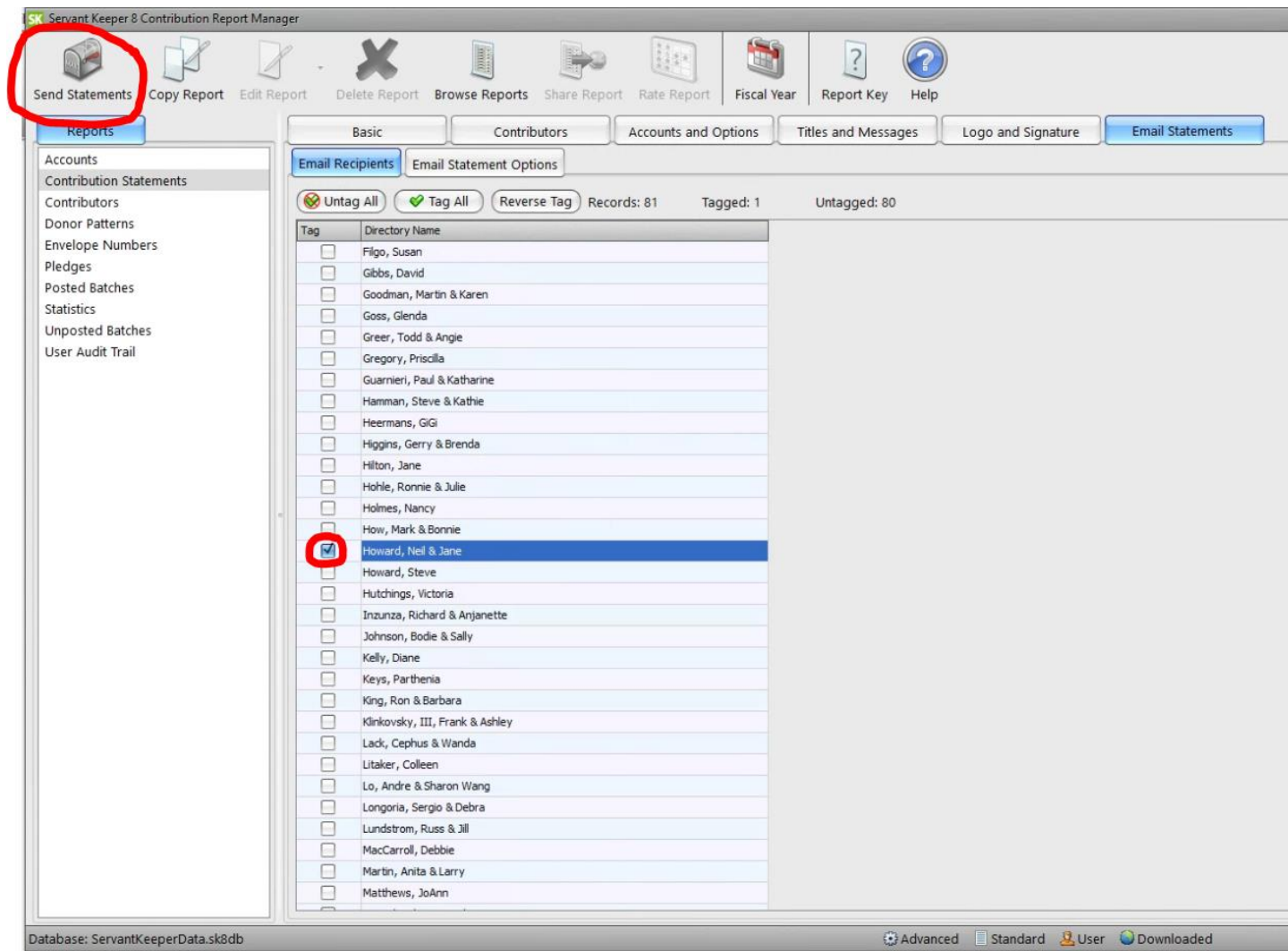
<https://myaccount.google.com/lesssecureapps>

and make sure that the **Allow Less Secure Apps switch is turned ON** in the security settings. Google turns this switch OFF automatically if the account is not routinely used, so you will likely have to do this **EVERY TIME**.

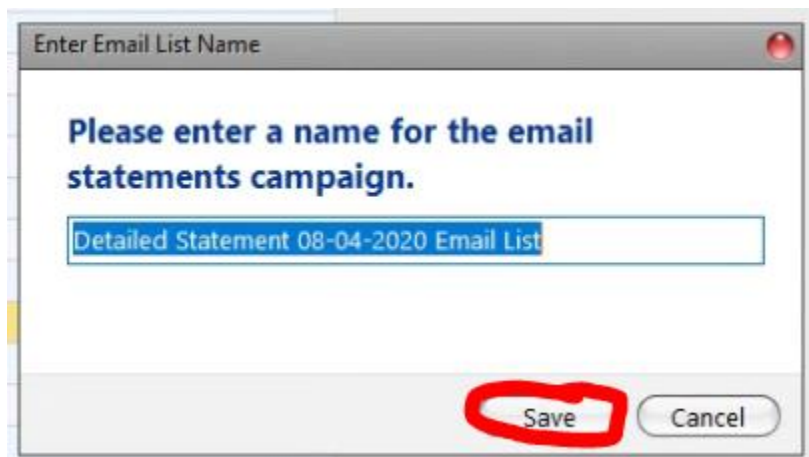
This switch disables a security feature that Google has implemented which keeps third-part applications, like Servant Keeper, from using Gmail to send email messages. You have to make sure that the CPFUMCFinSec@gmail.com email account is set up to allow SK to send email, otherwise the quarterly statements will never get sent by Servant Keeper.



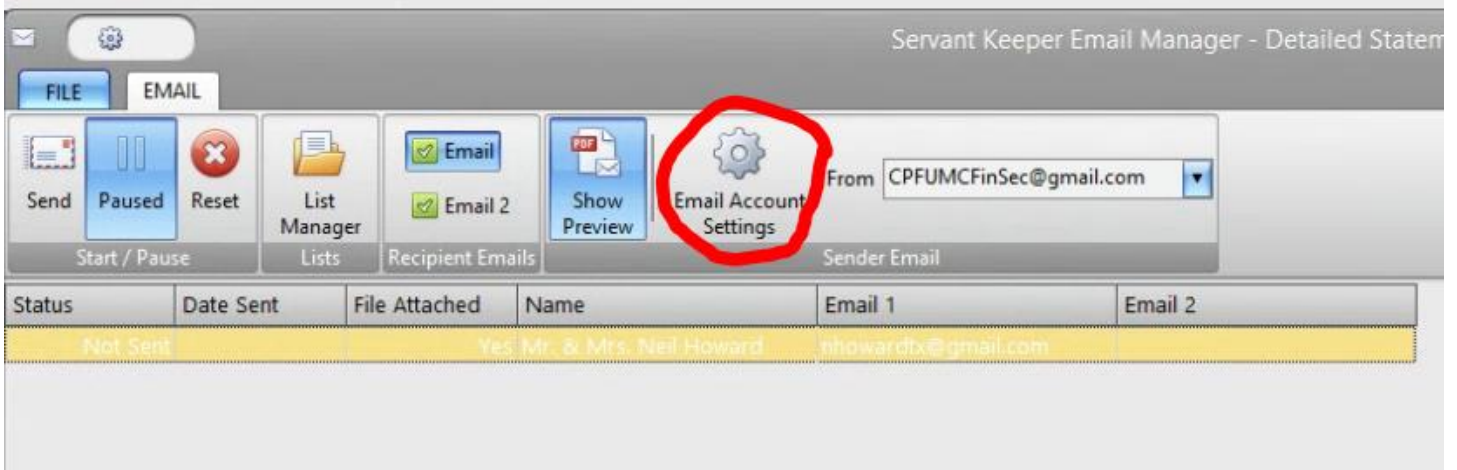
13. You can test email sending is turned on by sending a test email in SK. If that goes, then you can subsequently send the whole batch. Here's how to send a test email in SK: Select at least one name on the email recipients list (like your own name). Then click on Send Statements to get into the email section of SK:



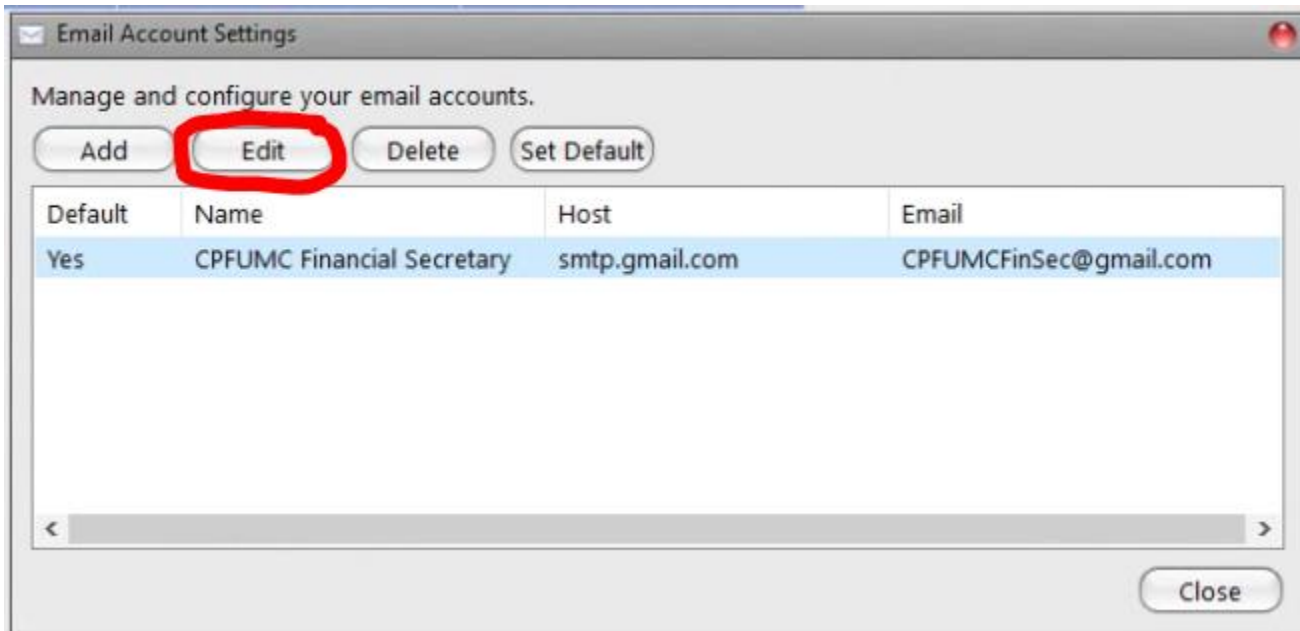
Click Save on the email list name dialog box



Click on the Email Account Settings icon



Highlight the CPFUMC Financial Secretary line and click on Edit. (You can also just double-click on the highlighted line.)



In the Email Settings dialog box, click on the Send Test Email button.

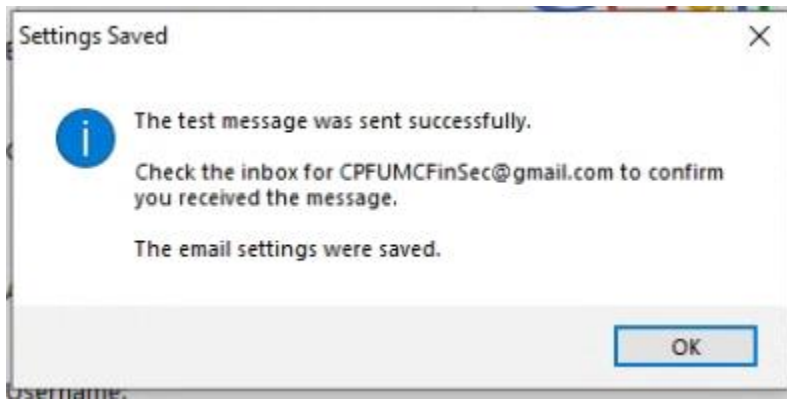
The screenshot shows the 'Email Settings' dialog box. At the top, it says 'Edit the information below to send email via your email server.' and 'For information on your email server settings contact your Network Administrator or your Internet email provider.' Below that is a note: '* Some email providers like GMail require you to enable less secure app access or third party app access. Please refer to your email providers support pages for more information.'

The fields are filled with the following information:

- Name: CPFUMC Financial Secretary (with a checked 'Default' checkbox)
- Email Provider: GMail (with the GMail logo)
- Email Address: CPFUMCFinSec@gmail.com
- Email Priority: Normal
- Outgoing mail server (SMTP): smtp.gmail.com
- Port: 587
- SSL Type: TLS
- Authentication: AutoSelect
- Username: CPFUMCFinSec
- Password: (masked with dots)

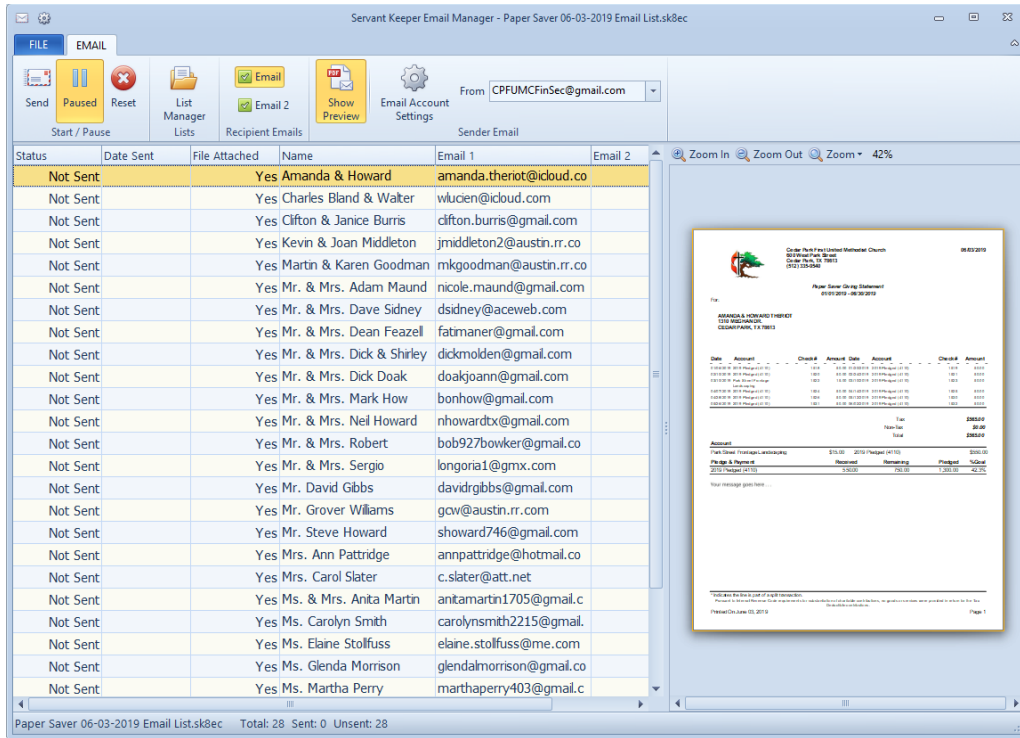
The 'Send Test Email' button is circled in red. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

You should get a Settings Saved informational message indicating that the test message was sent successfully:



This is your indication that the CPFUMCFinSec@gmail.com email account is ready and properly set up to send emails from Servant Keeper. If you don't get this successful test email, go back to Step 12 and check that the Allow less secure apps switch is set ON.

14. Now go back to SK Email Manager and check everything out and look at the preview of the giving statement. Did you select the correct format for the statement? Are the names in the list the correct ones to receive email statements? If you find any problems, you can X-out of this screen and no emails will be sent.



15. Press the **Send** button on this screen, you will have launched quite a number of emailed giving statements!

Servant Keeper Email Manager - Paper Saver 06-03-2019 Email List-1.sk8ec

FILE EMAIL

Send Paused Reset List Manager Lists Recipient Emails Email Email 2 Show Preview Email Account Settings

From CPFUMCFinSec@gmail.com

Status	Date Sent	File Attached	Name	Email 1	Email 2
Not Sent		Yes	Amanda & Howard	amanda.theriot@icloud.co	
Not Sent		Yes	Charles Bland & Walter	wlucien@icloud.com	
Not Sent		Yes	Clifton & Janice Burris	clifton.burris@gmail.com	
Not Sent		Yes	Kevin & Joan Middleton	jmmiddleton2@austin.rr.co	
Not Sent		Yes	Martin & Karen Goodman	mkgoodman@austin.rr.co	
Not Sent		Yes	Mr. & Mrs. Adam Maund	nicole.maund@gmail.com	
Not Sent		Yes	Mr. & Mrs. Dave Sidney	dsidney@acweb.com	
Not Sent		Yes	Mr. & Mrs. Dean Feazell	fatmaner@gmail.com	
Not Sent		Yes	Mr. & Mrs. Dick & Shirley	dickmolden@gmail.com	
Not Sent		Yes	Mr. & Mrs. Dick Doak	doakjoann@gmail.com	
Not Sent		Yes	Mr. & Mrs. Mark How	bonhow@gmail.com	
Not Sent		Yes	Mr. & Mrs. Neil Howard	nhowardtx@gmail.com	
Not Sent		Yes	Mr. & Mrs. Robert	bob927bowker@gmail.co	
Not Sent		Yes	Mr. & Mrs. Sergio	longoria1@gmx.com	
Not Sent		Yes	Mr. David Gibbs	davidrgbbs@gmail.com	
Not Sent		Yes	Mr. Grover Williams	gcv@austin.rr.com	
Not Sent		Yes	Mr. Steve Howard	showard746@gmail.com	
Not Sent		Yes	Mrs. Ann Pattridge	annpattridge@hotmail.co	
Not Sent		Yes	Mrs. Carol Slater	c.slater@att.net	
Not Sent		Yes	Ms. & Mrs. Anita Martin	antamartin1705@gmail.c	
Not Sent		Yes	Ms. Carolyn Smith	carolynsmith2215@gmail.	
Not Sent		Yes	Ms. Elaine Stolfuss	elaine.stolfuss@me.com	
Not Sent		Yes	Ms. Glenda Morrison	glendalmorrison@gmail.c	
Not Sent		Yes	Ms. Martha Perry	marthaperry403@gmail.c	

Paper Saver 06-03-2019 Email List-1.sk8ec Total: 28 Sent: 0 Unsent: 28

Zoom In Zoom Out Zoom - 42%

Order: Park First United Methodist Church
800 West Park Street
Cedar Park, TX 78613
(512) 253-0946

06/03/2019

Power Saver City Egg Statement
01/01/2019 - 06/30/2019

To: AMANDA & HOWARD FHERBERT
1330 MEDLANDER
CEDAR PARK, TX 78613

Date	Amount	Check #	Amount	Amount	Check #	Amount
01/01/2019	100.00	100	100.00	100.00	100	100.00
02/01/2019	100.00	101	100.00	100.00	101	100.00
03/01/2019	100.00	102	100.00	100.00	102	100.00
04/01/2019	100.00	103	100.00	100.00	103	100.00
05/01/2019	100.00	104	100.00	100.00	104	100.00
06/01/2019	100.00	105	100.00	100.00	105	100.00
06/30/2019	100.00	106	100.00	100.00	106	100.00
Total						600.00
Payment						600.00
Balance						0.00

Thank you for your contribution to the church. Your contribution is appreciated and will be used for the benefit of the church.

Printed On: June 03, 2019 Page 1

See the screen capture below. It shows what it looks like after all the emails have been sent.

Servant Keeper Email Manager - Detailed Statement 04-21-2020 Email List-1.sk8ec

FILE EMAIL

Send Paused Reset List Manager Lists Recipient Emails Email Email 2 Show Preview Email Account Settings

From CPFUMCFinSec@gmail.com

Status	Date Sent	File Attached	Name	Email 1	Email 2
Sent	4/21/2020 7:09:0	Yes	Mr. Grover Williams	gcvpe@twc.com	
Sent	4/21/2020 7:09:1	Yes	Mr. Steve Howard	showard746@gmail.com	
Sent	4/21/2020 7:09:1	Yes	Mr. Shawn Dubler	ougold7x@yahoo.com	
Sent	4/21/2020 7:09:1	Yes	Mrs. Ann Pattridge	annpattridge@hotmail.com	
Sent	4/21/2020 7:09:2	Yes	Mrs. Carol Slater	caroloreo@att.net	
Sent	4/21/2020 7:09:2	Yes	Mrs. Clara Crank	clara.crank@gmail.com	
Sent	4/21/2020 7:09:2	Yes	Mrs. Glenda Goss	cgoss33@gmail.com	
Sent	4/21/2020 7:09:3	Yes	Mrs. Hyacinth Fenty	hfenty31@gmail.com	
Sent	4/21/2020 7:09:3	Yes	Mrs. Karen Packard	kvpackard@aol.com	
Sent	4/21/2020 7:09:3	Yes	Ms. & Mrs. Anita Martin	anitamartin1705@gmail.com	
Sent	4/21/2020 7:09:4	Yes	Ms. Carolyn Smith	carolynsmith2215@gmail.co	
Sent	4/21/2020 7:09:4	Yes	Ms. Debbie MacCarroll	debbie.maccarroll@gmail.co	
Sent	4/21/2020 7:09:4	Yes	Ms. Elaine Stolfuss	elaine.stolfuss@me.com	
Sent	4/21/2020 7:09:5	Yes	Ms. Jane Hilton	hiltonjane@att.net	
Sent	4/21/2020 7:09:5	Yes	Ms. Martha Perry	marthaperry403@gmail.com	
Sent	4/21/2020 7:09:5	Yes	Ms. Nancy Holmes	holmesn2009@gmail.com	
Sent	4/21/2020 7:10:0	Yes	Ms. Parthenia Keys	par.keys@yahoo.com	
Sent	4/21/2020 7:10:0	Yes	Ms. Pauline Eng	pauline_eng@yahoo.com	
Sent	4/21/2020 7:10:1	Yes	Ms. Priscilla Gregory	cissygilla@gmail.com	
Sent	4/21/2020 7:10:1	Yes	Rev. & Mrs. Adalid	mlindav@gmail.com	
Sent	4/21/2020 7:10:2	Yes	Richard & Jodi Blount	jodi_blouint@hotmail.com	
Sent	4/21/2020 7:10:2	Yes	Ron & Barbara King	rbking411@att.net	
Sent	4/21/2020 7:10:2	Yes	Ronnie & Julie Hohle	rhohle59@gmail.com	
Sent	4/21/2020 7:10:3	Yes	Steve & Kathie Hamman	skhamman@msn.com	
Sent	4/21/2020 7:10:3	Yes	Walt & Pam Clinch	wclinch@gmail.com	

Detailed Statement 04-21-2020 Email List-1.sk8ec Total: 52 Sent: 52 Unsent: 0

Zoom In Zoom Out Zoom - 44%

Order: Park First United Methodist Church
800 West Park Street
Cedar Park, TX 78613
(512) 253-0946

04/21/2020

Detailed Statement
01/01/2020 - 04/21/2020

To: WALT & PAM CLINCH
1330 MEDLANDER
CEDAR PARK, TX 78613

Date	Amount	Check #	Amount	Amount	Check #	Amount
01/01/2020	100.00	107	100.00	100.00	107	100.00
01/15/2020	100.00	108	100.00	100.00	108	100.00
01/31/2020	100.00	109	100.00	100.00	109	100.00
02/15/2020	100.00	110	100.00	100.00	110	100.00
02/29/2020	100.00	111	100.00	100.00	111	100.00
03/15/2020	100.00	112	100.00	100.00	112	100.00
03/31/2020	100.00	113	100.00	100.00	113	100.00
04/15/2020	100.00	114	100.00	100.00	114	100.00
04/21/2020	100.00	115	100.00	100.00	115	100.00
Total						1100.00
Payment						1100.00
Balance						0.00

Thank you for your contribution to the church. Your contribution is appreciated and will be used for the benefit of the church.

Printed On: April 21, 2020 Page 1