




Julep FAQ: How Do I Create a Donor Giving Statement

In Julep, you have the ability to create a **Donor Giving Statement** while using **Money Search**. It will give you a donor's history statement for a given time period and total per fund codes in that period.


How to Create a Giving Statement Organization

1. Go to  icon on the **People Dashboard**.

2. Select the **Giving Statement Organization** tab then click



3. On the new page please fill out all the fields with red flags and then select



How To Create a Donor Giving Statement

1. Go to  icon on the **Fundraising Dashboard**.

2. Fill out the desired filters for your search and click



Note: If you do not want soft credit included in your Donor Giving Statement please make sure to use the exclude soft credit toggle in your search. For this to only pull the gifts in your giving period, you must use a Batch Date filter that matches the giving period you will use in Step 4.

3. On the result page, click  and select **Giving Statement**.

- On the new window, you will have the option to select an existing organization or to create a new one in **People Settings**. You will then enter in the **Gift Period** for the statement.

- Once all fields have been filled out click [Print](#)
- After you print the **Donor Giving Statement**, your page will appear as seen below.

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Rachel Gideon

Simms Foundation
98-7654321
1593 Spring Hill Road
Vienna VA 22018

Giving Statement
Gift Period: 1/1/24 -13/31/24

Rachel Gideon
Neptune Drive
Alexandria, VA 22309

Payments

| Gift Type | Gift Date | Fund | Contribution Amount | Check Number |
|---------------------------------------|------------|------|---------------------|--------------|
| | 01/18/2024 | EDU | \$1,000.00 | |
| Total gift amount of payments | | | | \$1,000.00 |
| Total contribution amount of payments | | | | \$1,000.00 |
| Total number of payments | | | | 1 |

Fund Totals

| Fund | Total |
|------|------------|
| EDU | \$1,000.00 |

In order for Your Committee or Organization to use Simms Foundation, you must purchase Our Services by agreeing to the terms of this Master Subscription Agreement.

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