

Donor Receipts – Year-End or Single, and Troubleshooting

1) End-of-Year printing of all donation receipts

When your Jewel “Next Step” says “Print Receipts,” and Jewel asks if you are ready, click “No” and check three things.

A) Go to Maintenance/Properties/Reports Tab.

Use the drop-down arrow to choose “Calendar Year Reports.”

Make sure that the “Report Type” is set to “Receipt Summary – Last Calendar Year.”

If it is not, use the “Add/Delete” buttons. Delete what is there and Add “Receipt Summary – Last Calendar Year.”

Click the green “OK V” in the top right to save and leave.

The screenshot shows the 'Properties' window with the 'Reports' tab selected. Under 'Select Automatic Reports', there is a table:

Report Type	Time Period	Copies
Receipt - Summary	Last calendar year	1

To the right of the table, 'Copies to Print' is set to 1, and 'All Reports' is unchecked. Below the table are 'Add...' and 'Delete' buttons. To the right are 'Move Up' and 'Move Down' buttons. In the top right corner, there are 'OK' and 'Cancel' buttons.

B) Go to Reports and Graphs/Contribution. Set the Date Range for the year you are printing and set it to sort “By Donor” which shows you a one-line-per-donor list.

The screenshot shows the 'Contribution Report' window. The 'Dates' section has a dropdown menu set to 'Last fiscal year (2024)' and a date range from '01/01/24' to '12/31/24'. The 'Summary' radio button is selected, and 'By Donor' is selected under the sorting options. The 'Contribution Report' title is displayed in a large, stylized font.

Scanning down through this list before you print receipts gives you a chance to catch any glaring errors. You might see a child’s name with their parent’s tithe posted to it. Or an elderly person on a fixed income or a deceased member with a huge donation that was mis-posted. You know your members and their giving habits. Scroll down through and see if anything odd jumps out at you. Fixing errors before you print is helpful and will save time in the long run.

While you are at it, fix any spelling or formatting errors you find.

C) Make sure your printer has enough paper and ink to finish the print job. Don’t start printing with your “ink low” light flashing. Load the paper tray.

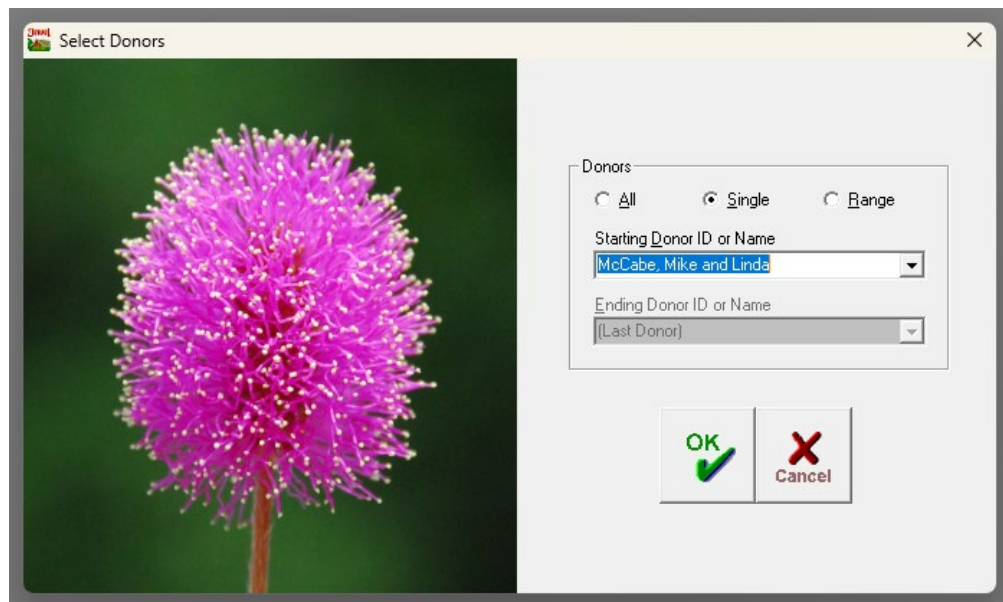
Now you are ready to print. Return to the “Print Receipts” next step button. Click “Yes.”

Once they are printed, don't forget to sign them before you hand them out. If you have a lot of receipts to sign, a signature can be loaded into Jewel under the "Church Info" tab of the Properties page. *(Tutorial #7240)*

Using #9 double window envelopes, fold and insert so the name and address shows.

You can start handing out receipts at church as soon as they are printed and you can mail the ones that are left. Receipts are required to be distributed or in the mail before January 31, but earlier is better.

2) Reprinting Individual Donation Receipts.



When you need to print/reprint a donation receipt for an individual or couple, follow these instructions.

Go to "Reports and Graphs/Receipts."

Click on "Single" and find the name(s) you wish to reprint by entering the last name and using the down arrow to scroll until you locate it.

Click "OK v"

Verify the date range

Verify "Summary"

Click "Print. "

Don't forget to sign it, if needed.

3) Troubleshooting Printing Problems.

Every year there are a few treasurers whose printers produce two-sided donor receipts. And since donors don't seem to want to share receipts (joking), every January I have tried to figure out why. Since printers vary, it is hard to find "the solution," but I think I finally have something that will (may) help. ☺

Printers have default settings from the factory, and it seems that more newer printers are defaulting to two-sided, because I have had more treasurers with problems lately.

If you are tech savvy, just follow these instructions. (If you are not, contact me for assistance)

Go to Control Panel/View Devices and Printers. Click on the printer you are using, and then find its settings.

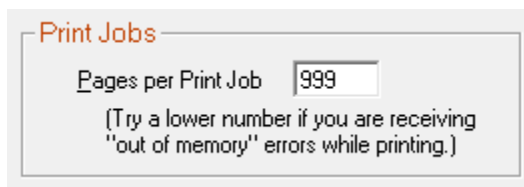
How the settings are labeled varies, depending on the printer. One of my printers calls it "Set Preferences." It might say "Adjust Print Options." Whatever it is called, keep clicking until you find it.

Again, printers vary, but you may find a setting for "duplex printing" or it might have the word "booklet" in it. In any case, look for the words "two-sided" and you want to change it from two-sided. It probably won't say "single-sided." It might must be the only option is to change it to "None."

Make sure that after you have changed it, you save it. If there is a box that says "Apply" down at the bottom, click on it, then OK to leave the page. Then to make sure, come back in and make sure it has not defaulted back to "two-sided." If it did, figure out why it is not saving it and fix it.

Once you know the setting has been changed to one-sided, there is one more thing to do.

Go to Jewel/Maintenance/Properties/Reports Tab and change the "Pages per Print Job" setting from 20 (the default) to a number that is larger than the amount of receipts you will be printing. 999 seems fairly safe for most churches.



Click the green "OK ✓" to save and leave.

Now try printing. Be ready to pull the paper or the paper tray out if it starts printing two-sided. That is the fastest way to stop it. But hopefully, that will keep it from happening.

Corresponding videos: 2.3 – Accuracy in Posting and Dating. Find at <https://www.gccsda.com/auditing/10963>
12.1 – Year-end Receipts

For more tutorials on JEWEL PROGRAM BASIC FEATURES, see section 7000 on the gccsda.org auditor webpage

*This information has been brought to you by the Georgia-Cumberland Conference Audit Team
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