

How to Print Monthly Reports (or Individual Reports) to PDF

In order to print monthly reports to PDF, there are four steps that must be done the first time. They won't need to be repeated.

1) In Jewel, go to Maintenance/Properties/General Tab. If the highlighted box is not checked, check it.

The screenshot shows the 'Properties' window with the 'General' tab selected. Under 'General Options', the checkbox 'Show Print Setup Before Printing' is checked. A red arrow points from the instruction text to this checkbox.

The screenshot shows the 'Select Automatic Reports' dialog box. The 'Monthly Reports' dropdown is selected. The list shows 'Financial Summary' highlighted in blue. The table below is a representation of the data in the screenshot:

Report Type	Time Period	Copies
Financial Summary	Last month	1
Financial Summary - Detail	This fiscal year-to-date	1
Financial Summary - Detail	Last month	1
Contribution Report - Summary	Last month	1
Deposit Report	Last month	1
Checks Written Report	Last month	1
Transfer/Allocation Report	Last month	1

2) While still in Maintenance/Properties, click on the "Reports" tab. Look for a report named "Contribution Report – Detail." If you do not see it, or if you have a "Contribution Report – Summary" then you are fine. Click on the green "OK v" in the upper right to avoid losing your changes, and continue to step #3.

If you DO find "Contribution Report – Detail" in the list of reports, click on it to highlight in blue, then click on the "Delete" box just to the right. Jewel will ask if you are sure. Click "Yes."

Click on "Add" and then choose "Contribution Report – Summary" to replace it.

The screenshot shows the 'Select Automatic Reports' dialog box. The 'Contribution Report - Detail' is highlighted in blue. The 'Delete' button is circled in red. A red arrow points from the instruction text to the 'Delete' button.

IMPORTANT! "Contribution Report – Detail" has donor names and donation totals, so should never be distributed to the church board. If you plan to email the "Monthly Reports" as a package, remove this report from the regular monthly reports now so it is not accidentally emailed to the board.

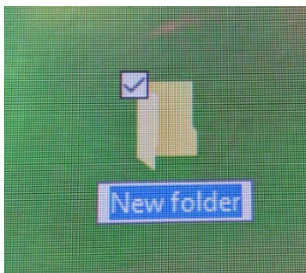
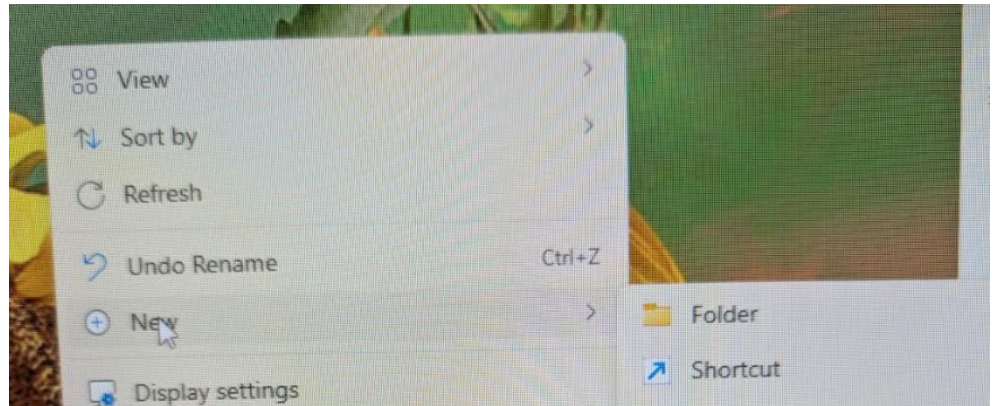
Once the “Contribution Report – Detail” has been deleted and the “Contribution Report – Summary” has been added, click on the green “OK v” in the upper right to save your changes, and continue to step #3.

3) Create a file folder on your computer desktop and name it “Monthly Reports.”

If you do not know how to do this, follow these instructions. If you still need help, contact me.

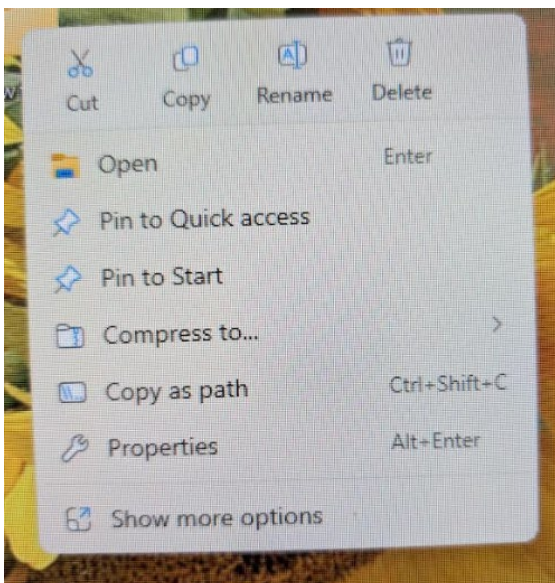
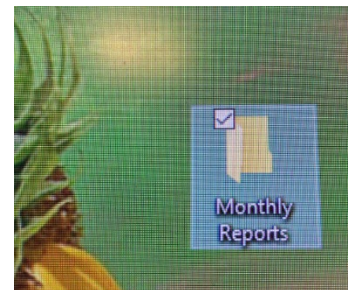
a) Close all programs so that you can see your desktop – which is the screen that you see when the computer is on but all programs are closed. Right click your mouse anywhere on the desktop.

b) In the box that appears, find and click on “New” and then find and click on “Folder.”



c) This is what your new folder will look like. Notice that the name “New Folder” is in blue. That means that you can edit it. Don’t move your mouse or click on it. Just start typing and type in the words “Monthly Reports.”

d) This is what it should look like when you are finished.



NOTE: If for some reason, yours doesn’t say “Monthly Reports”, right click on the little folder icon and when this box appears, find and click on “Rename.” The name will be blue again and you can enter the words “Monthly Reports.” Keep trying until you are successful.

4) Download the free CUTEPDF Converter.

(Note: I used to use the “Microsoft Print to PDF” printer that is already installed on your computer, but this converter works much better.)

a) Click or enter on link:

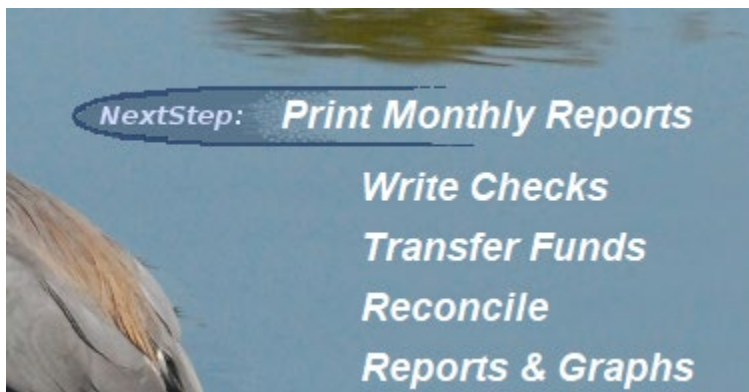
<https://www.cutepdf.com/index.htm>

b) Click on “Free Download.”

From here on, because of differences in computers, I can’t tell you exactly how to finish the download. It may show up on the bottom left or the top right of your screen. But wherever it shows up, click on it and follow instructions. If your computer asks if you are ok with this program on your computer, say yes. If you need help, call me, or grab the nearest 12 year old and ask for help. (Just kidding, kinda....☺)



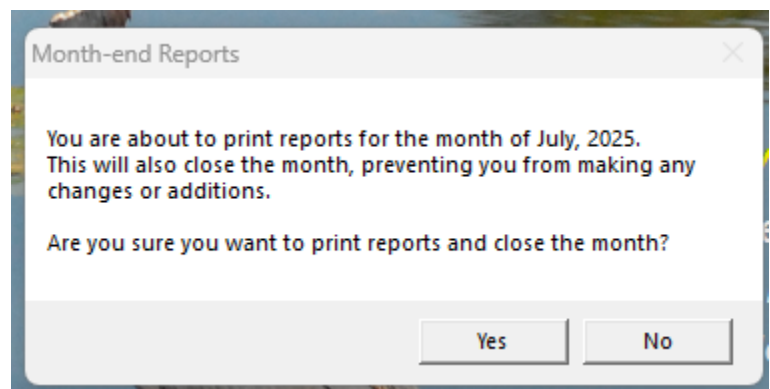
NOTE: These first 4 steps will only have to be done once. After this, you will just start with step #5.

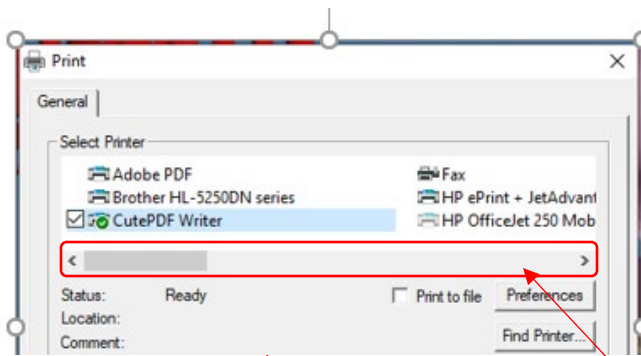


5) Go to Jewel home page and click on “Print Monthly Reports.” If “Print Monthly Reports” is not your “Next Step,” continue to follow the steps to closing the month until it is.

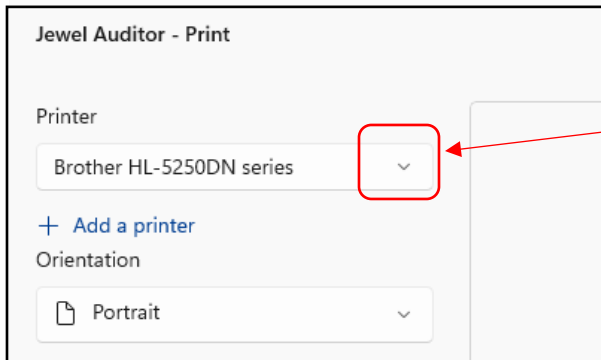
a) Say “Yes” to this question box.

If your computer starts printing immediately, and doesn’t ask you which printer you want to use, go back to the top of this document and do Step #1 over again. Then come back to Step #5 and try again.





A box should appear that gives you printer choices. It might look like either one of these, depending on your version of Windows. And your list of available printers will be different than mine. But you should be given options.



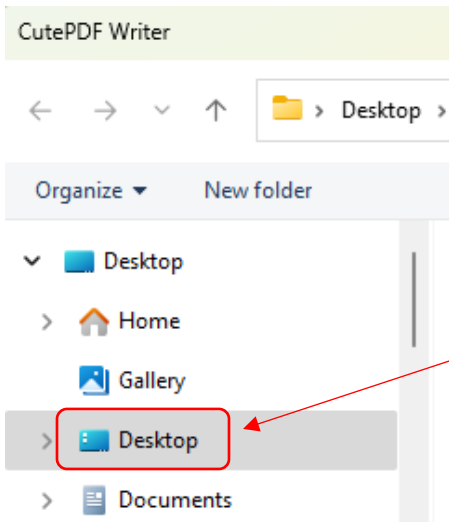
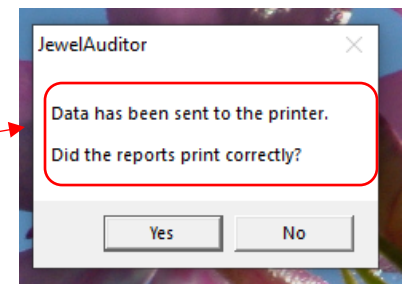
This one has a slider bar that you can use to see more options.

This one has a drop down arrow.

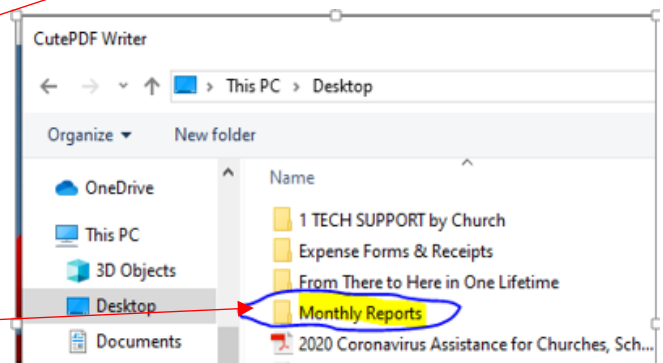
Whichever one you have, find and choose "CutePDF Writer." Then click "Print."

c) Once you have clicked on "Print," you will have a chance to name the file and tell your computer where to save it.

NOTE: It will take several seconds for the next step to appear so you can name and save your reports. This box may pop up first, but just ignore it until all the reports are finished. Then you can click "Yes."



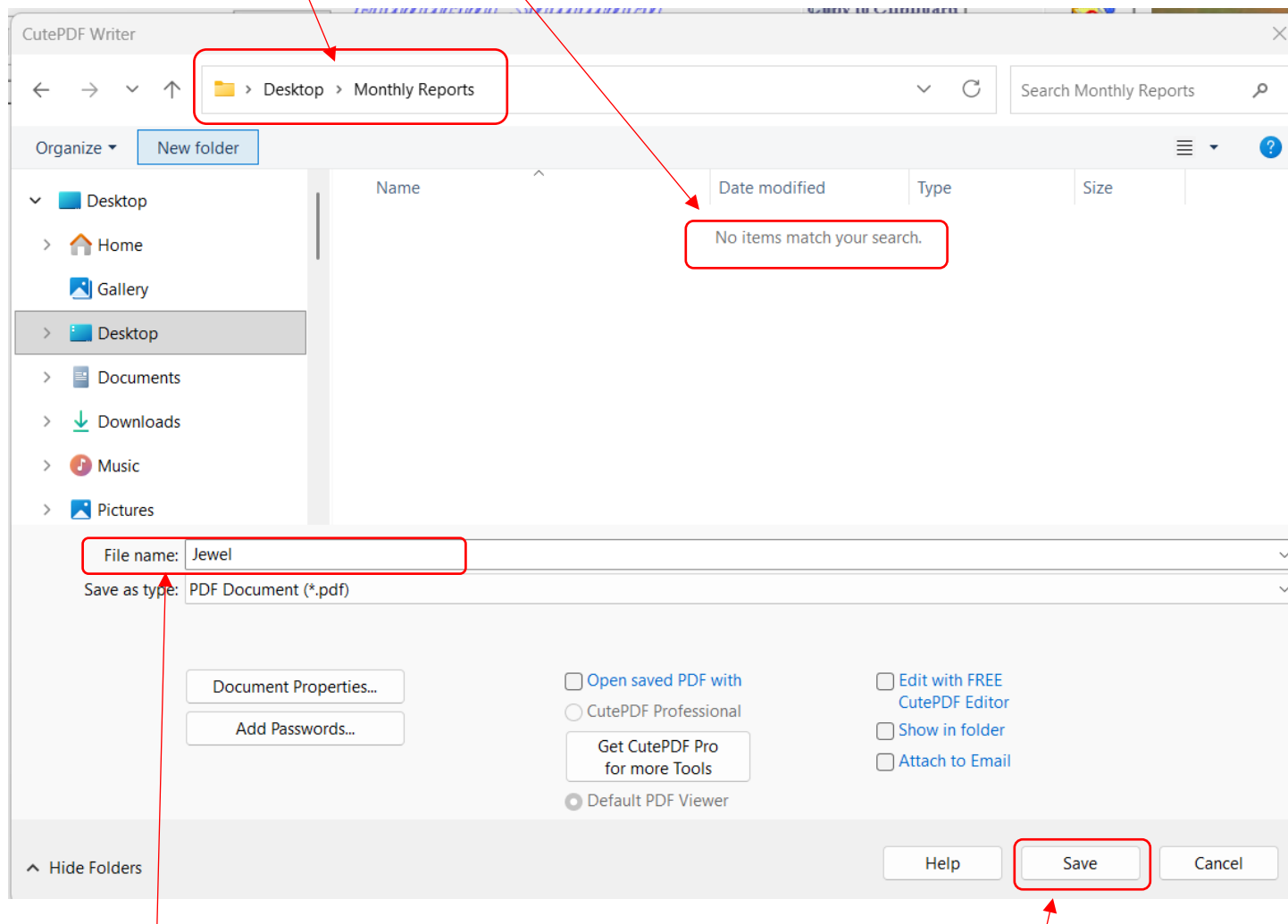
To find the destination folder, find and click on "Desktop" in the small box that appears.



d) Next, find and choose the "Monthly Reports" folder that you have created.

This is what the top bar should look like. This tells you where you are saving these reports.

The first time you use it, the folder will be empty, but after that, you should see a list of reports when you click on it.



In the “File Name” bar, delete what is there and enter the name of the reports you are saving. (See below for naming tips.)

Once named, click on “Save.”

Your reports should now appear in the “Monthly Reports” folder on your desktop.

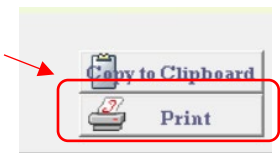
If they do not, ask for assistance to get the process set up. Once set up, it should be easier to find, name and save.

Naming Tips: Consistency and System in naming your reports will help you in finding the one you want, once they are in the folder.

Start with the year, then the month, then the description. “2024-08 Monthly Reports.” This will keep them neatly in chronological order, with all reports for that month together.

-   2024-06 Monthly Reports If you start with the name of the month, Jewel will alphabetize them. April, August, December, February, which will make the one you want hard to locate.
-  2024-07 Monthly Reports
-  2024-08 Bank Rec Report If you start with the number of the month, after a year, all the Junes for various years will line up together, again, not as easy to locate.
-  2024-08 Monthly Reports
-   2024-09 Monthly Reports Starting with the 4-digit year will keep them all in order through multiple years, enabling you to easily find what you want when you are ready to attach it to an email.

You can save individual reports the same way, to the same folder. Example: Open “Financial Summary,” click on “Print,” name it “2025-04 Financial Summary Detail” (Using the correct year and month) and save it to the same reports folder on your desktop. Another one: “2025-04 Bank Rec Report.” Print, choose destination folder, name, save, done. That way, all reports from that same month will be lined up together.



Emailing the Monthly Reports: When you are ready to send the reports in an email, click on the paperclip symbol at the bottom of the email, then in the box that appears, find and click “Desktop” then “Monthly Reports,” then find and click on the report(s) you want to send.

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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