



## Giving Statement Summary

The Giving Statement Summary Report provides you with a summary of giving for a date range. Totals are broken out into tax-deductible and nondeductible giving and can be generated per individual or per Family. If you choose Family, you can combine all members in the total, no matter their Family positions (i.e., all Children and Others in addition to the Primary Contact and Spouse). This is a great Report to use if you would like to generate giving information without a list of Transactions. When pulling this report, the preference is for it to be pulled by Household. There are instructions on Households below.

Individual Giving Statement Summary (2) <span>🔍</span> <span>Edit Settings</span> <span>Actions ▼</span>												
Last Name	First Name	Street	City	State	Postal Code	Country	Carrier Route	Phone	Email	Deductible	Non-Deductible	Total
Beating	Andrew			CO						\$100.00	\$0.00	\$100.00
Bob	Sarah			OK					sarahbob@email.com	\$200.00	\$0.00	\$200.00
Bolton	Ben			OK				(719) 266-2888		\$250.00	\$0.00	\$250.00
										\$550.00	\$0.00	\$550.00



## Learning about Households

This article explains the Households feature in Pushpay, which is an interactive list of the households in your community.

Provide a short description of the article. The title appears in the article and in search results.

**Note:** Church Community Builder customers will have access to Pushpay Households at a later date, once [Profile Link and Sync](#) is enabled. At that point we will be automating the creation of Households in Pushpay to mirror Church Community Builder families.

Households provide you with a holistic view of your community. This gives you visibility of who is in a household and the giving associated with all members of that household. Having your people organized into household groups allows giving statements to be generated for them from January 2021 onwards and for those statements to be visible in the Giving area of a household record.

**Note:** Households is only inclusive of individual members; organizations and businesses that have given to you are not shown here, but can be seen in the [Community members](#) tab.

## Household List Functionality

Use the Household list to filter, search, and sort households based on contact information as well as date created (the date that the household record was created in Pushpay) and last updated (the date that the record was last updated by either an admin or through their personal Pushpay account). Households can be sorted by all columns, with the exception of the household name, address, and phone number.

Filtering by missing or incomplete contact details can be particularly helpful when checking household details in preparation for sending household giving statements (available beginning January 2021).

The Household list itself is interactive, and you'll be able to launch your email client or make phone calls by clicking directly on the email address or phone number. The details shown in the list are for the member marked as the **primary household contact**. You'll also be able to directly edit "Your ID" from the list by clicking "Your ID".

The current list of household records that you are viewing can also be exported in .CSV format by clicking the export button. From here, you can also archive household records one at a time.

Household Name	Members	Email	Phone	Address	Your ID
Garcarz (Suzanne)	1	suzanne_garcarz@gmail.com	(656) 193-1664	313 Alfredo Hill Suite 685	715411
Garcia (Judy & Eric)	2	judyeric-garcia29@yahoo.com	(174) 236-5200	33 Marcos Ford	74915
Auer (Darrell)	1	darrell_d_auer@hotmail.com	(616) 6652682	3192 Yundt Locks	42612
Gibbs (Delia & Leo)	3	Delia.Gibbs@redavix.com	412-418-2504	2367 Chandler Hollow Road	18330
Gilbert (Peter & Marie)	2	dawsonlehner@yahoo.com	(619) 455-6217	4724 Altenwerth Isle	16369
Johnston (Adam)	1	adamjohnston_us@hotmail.com	+86 (898) 573-3452	07 Jett Mills	527900
Doyle (Ryley & Carla)	2	ryley_doyle@karlie.org	(413) 132-7211	34 Mack Orchard Apt. 563	2356
Jake (Cassin)	1	cassin_jake@rory.name	(538) 461-5296	953 Rice Village Suite 837	456456
Waelchi (Kayden & Laura)	2	kayden_waelchi@yahoo.com	(619) 455-6217	3384 Ilene Drive	18568
Auer (Delia & James)	3	delia_auer@hotmail.com	(888) 573-3452	893 Curil Wave	2355

## Adding a Household

You'll also be able to add household records using the "Add a household" button. The minimum details required for a household record are First Name and Last Name of the first person you are creating that belongs to this household.

## Household Details

Click on a household from the Household list to navigate their household record and view their full details and transaction history within your organization.

The Household Bio at the top of the profile displays a household's primary contact details.

In the household's profile, you can view the details of all the members of that household, as well as adding or removing members and changing their household position.

The screenshot displays the Pushpay interface for a household. The top navigation bar includes the Pushpay logo and 'Central Church'. The left sidebar lists various navigation options, with 'Community' selected. The main content area shows the household details for 'Parker (Kathy) Household', including a house icon, household key ID, creation date, address, phone number, and email. Below this, there are tabs for 'Members', 'Giving', and 'Transactions'. The 'Members' tab is active, showing a list of members with a search bar and an 'Add new member/s:' button. A 'Household Record Information' table is also visible, providing details about the household's ID, family ID, and creation date.

**Central Church**

**Parker (Kathy) Household**

Household Key ID: hsdubfg826f11  
 Created on: 10 Mar 2020  
 Last Updated: 16 Mar 2020

801 Alexander Avenue, San Rafael, CA, 94901, USA  
 (415) 686-0500  
 k.parker@forafore.shop

**Members** Giving Transactions

**Kathy Parker**  
 Adult, 23 years old (415) 686-0500 k.parker@forafore.shop

Add new member/s:  
 Search by Name or ID

**Household Record Information** Edit

Household Key ID	hsdubfg826f11
Your Household ID	190211
Church Community Builder Family ID	9478110
Created on	10 March 2020

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## Member Information

This area shows you all the community members associated with the household you are viewing. If a member has an app profile, their profile picture will be displayed. [Primary and Secondary indicators](#) are displayed as a badge.

Age, age category, dependency status, and archived status are displayed as associated text. The profile picture for deceased and archived members will be faded.

## Adding New Member/s into Households

To group people into households, Navigate to Community → Households. This will show you a list of all your Households. Click on the household you wish to add new members to.

In the household record, use the Add new member/s area to create a new community member or search for an existing community member to add to the household. The search will also return any community members marked as deceased.

Community / Households / Gibbs (Delia)

**Delia Gibbs Household**

Household Key ID: hshw122uxc  
Created on: 10 Mar 2020  
Last Updated: 16 Mar 2020

2367 Chandler Hollow Road, Crafton, PA, Pennsylvania, 15205  
412-418-2504  
Delt\_G@mhcncnt.icu

**Members** Giving Transactions

- Delia Gibbs** Primary  
Adult, 38 years old 412-418-2504 Delt\_G@mhcncnt.icu
- Letta Gibbs**  
Child, 4 years old 412-418-2504  
Also located in [Heathcote Household \(Main\)](#)

**Add new member/s:**

Je |

- Jed Betherall** Adult, 42 years old (656) 193-1664 jed.betherall189@delimit.com
- Jeff Smythson** Adult, 28 years old (998) 593-2700 jeff.smythson@mit22.com
- Alan Gibbs** (532) 198-2394 jeffrey\_gibbs@mhcncnt.com
- Jefferson Gibbson** Child, 14 years old (212) 553-1109 jj\_n\_gibbson@kklit.com

**Member Members**

- Jeffrey Gibbs (Deceased)** Adult, 72 years old

Feedback

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# Changing Member Positions and Removing from Households

In the household record, use the 'kebab' menu (three vertical dots) to open an inline menu that allows you to change **the positions of the members** in a household or remove them from a household. For children in a household, there is an additional option to set the household you are viewing as the child's main household if another household is currently set as their main household.

Community / Households / Gibbs (Delia & Leo)

### Delia & Leo Gibbs Household

Household Key ID: hshw122uxc  
Created on: 10 Mar 2020  
Last Updated: 16 Mar 2020

2367 Chandler Hollow Road, Crafton, PA, Pennsylvania, 15205  
412-418-2504  
Delt\_G@mhcncnt.icu

**Members** Giving Transactions

- Delia Gibbs** Primary  
Adult, 38 years old | 412-418-2504 | Delt\_G@mhcncnt.icu  
Options: Set position as Secondary, Set position as Household Member, Remove from household
- Leo Gibbs** Secondary  
Adult, 39 years old | 484-560-1269 | Leo55@delimiterefugees.com
- Letta Gibbs**  
Child, 4 years old | 412-418-2504  
Also located in [Heathcote Household \(Main\)](#)  
Options: Set as child's Main household, Remove from household

Add new member/s:  
Search by Name or ID

#### Household Record Information

Household Key ID	hshw122uxc
Your Household ID	18330
Church Community Builder Family ID	9478110
Created on	10 March 2020
Last Updated	16 Mar 2020

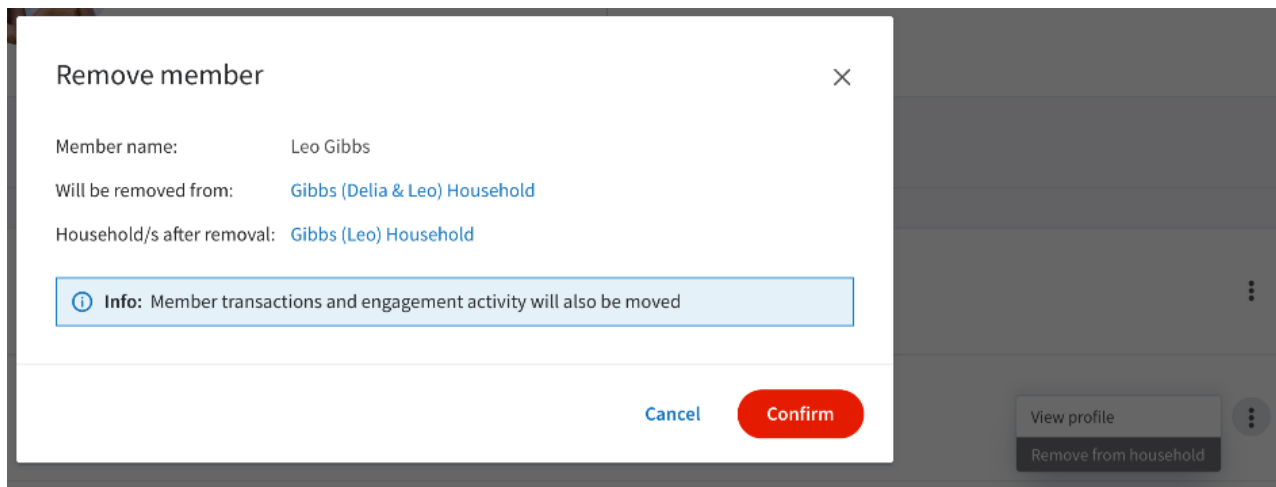
#### Former Members

- Jeffrey Gibbs (Deceased)**  
Adult, 72 years old

Feedback

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Removing a member from a household will move them into their own household and remove all transactions and engagement activity into the new household.



## Editing a Household Member's Profile

To edit a household member's profile, click on the member whose details need updating. This will take you to their individual record where you can make any necessary changes. You can use the link on their individual profile to return to the household view when you're finished making your changes.

## Household Record Information

This area shows you the Household Key ID, Your Household ID, The Church Community Builder Family ID (customers with Church Community Builder only), and the date this household record was created.

For more help: [care@pushpay.com](mailto:care@pushpay.com)