

Custom Report Example - Contributions Over \$250 Report

This example lists individuals who made a single donation of over \$250 to a Contribution Fund. It shows how to create a filter that consists of more than one condition. It also shows how to edit the report form to remove duplicate names. As usual, you can refer to previous examples for details on creating a query.

To create the contributions report:

1. **Add a new query to the Contributions module.** Select Custom Reports from the Contribution menu. Choose the Posted option and add a new query entitled "Contributions Over \$250."
2. **Add the first condition for the query filter.** The program prompts you for this condition when you create the new query. Using the tabbed pages on the Filter Condition dialog box, add the condition Contribution Amount is greater than or equal to 250.00.
3. **Add the second condition for the query filter.** Click Add on the Filter Building window. When you see the prompt for a connector, click And. Using the tabbed pages on the filter condition dialog box, choose Contribution Date as the field. Choose Between two dates as the operator. On the last page, choose the Ask Later option. This option lets you enter a date range whenever you select this query.
4. **Select the output fields.** From the Query List Manager, choose the new query and click Select. You see the Select Fields to Show in Query dialog box. Select the following output fields: Envelope Name, Contribution Date, Contribution Fund Desc, Contribution Amount.
5. **Specify the sort order.** Click Edit Sort Order on the Query Overview window. Choose the following fields: Profile Last Name, Profile First Name, and Contribution Date.
6. **Run the query.** You see a prompt asking for a Contribution Date range. Enter a range; for example, from 01/01/2006 to 03/31/2006.
7. **Edit the report form.** Click Edit Form on the Setup for Column Layout Report dialog box.

0	1	2	3	4	5	6	7	8	
Envelope Name				Date	Desc	Amt			
△ Page Header									
0	env_name	date	desc	amount					
▲ Detail									
0	DATE()							Page	PAGEN
△ Page Footer									

8. **Using the Report Designer, remove duplicate names from the output.** In the Detail band, double-click the field object env_name. This is the Envelope Name field. You see the General tab of the Field Properties dialog box. Click the Print When tab. Choose the No option under Print Repeated Values. This tells the program to print the name once even if it appears in multiple records. Click OK.
9. **Save the report layout and exit the Report Designer.** Choose Save from the File menu. Then choose Close from the same menu.
10. **Print the report.** Select the Printer option on the Setup for Column Layout Report dialog box. Then click Start Report to see the Print dialog box. Finally, click OK to print your report. The results should look like the following illustration.

Envelope Name	Date	Desc	Amt
Annette Baxter	02/12/2006	General Fund	300.00
	03/12/2006	General Fund	500.00
Edward & Carol Baxter	03/12/2006	Brazilian Missionary Fund	250.00
Stephan & Laura Beckman	03/05/2006	General Fund	500.00
	01/08/2006	General Fund	600.00
Joseph Copeland	02/19/2006	African Missionary Fund	750.00
Donna Douglas	01/01/2006	General Fund	350.00

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