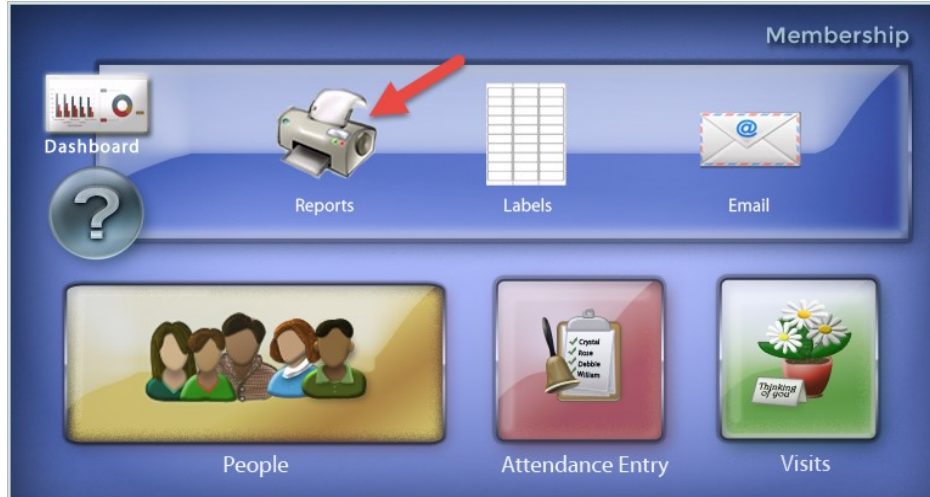


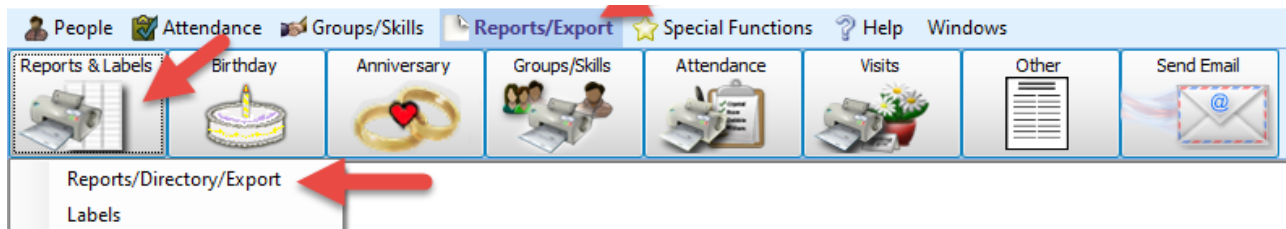
The Basic Report option is in a column format, which allows the creation of a report that displays the information you need to see. The criteria is set on Step 1 and the format is set on Step 2; both are specific to the report you are creating. The *Basic* report can be used for most reporting..

To begin, go to *Membership>Reports* (using the Portal at the center of the screen).



OR

Go to *Reports/Export>Reports & Labels>Reports/Directory/Export*

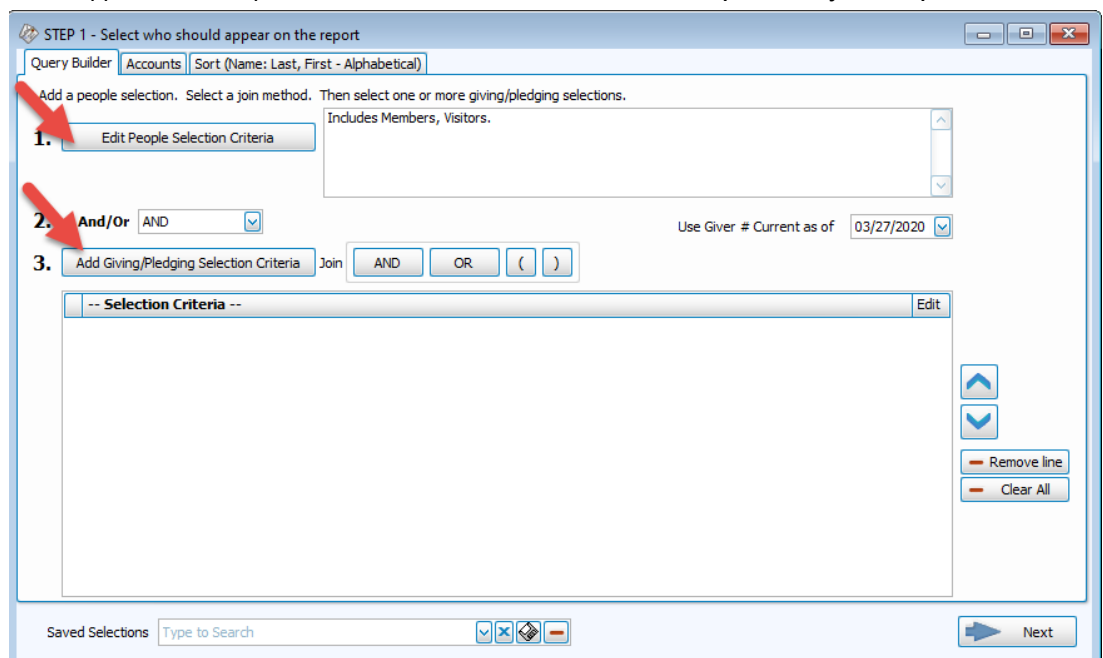


On the *Step 1* – *Select who should appear on the report* - choose the criteria for who will print on your report.

On the *Query Builder* tab, you can use the *Edit People Selection Criteria* and *Add Giving/Pledging Selection Criteria* buttons to enter criteria for the report as well as the *Accounts* tab.

The *Sort* tab allows you to set the order the people will appear on the report.

Use the *Saved Selections* to save the report criteria to be used again.



Example is a Basic report of people that are between the ages of 25 & 45 AND have given in the last year.

At #1 Edit People Selection screen.

1. Choose Age
2. Choose *between* at Select operator and enter value(s)
3. Fill in the age range
4. Categories selected are *Members & Visitors*
5. Click + Selection to confirm the selection
6. Click OK.

#2 And/Or - choose AND (which is the default).

#3 At Add Giving/Pledging Selection Criteria

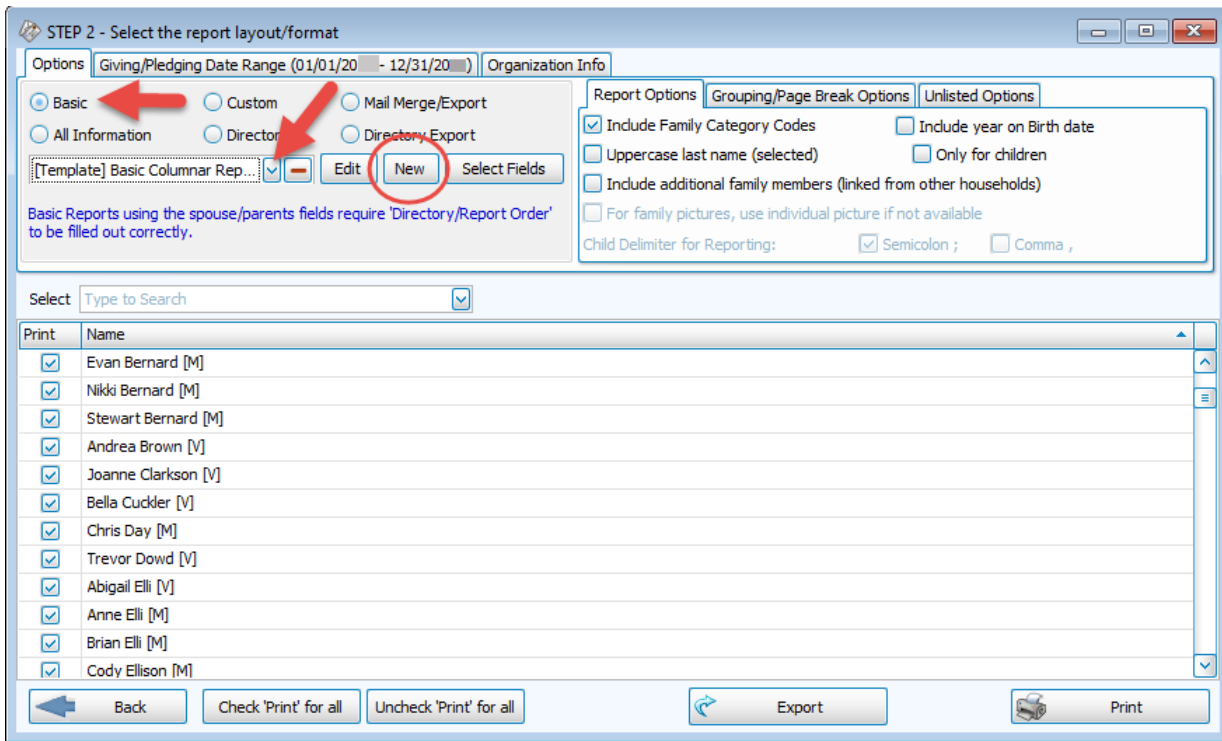
7. Click on *Only those who gave*
8. Set the *Date Range*
9. Click +Add .

Before you click *Next* on *Step 1*, you may wish to save your criteria for your report. At the bottom left of the *Step 1* screen at *Saved Selections*, click on the floppy disk to *Save Selections as* and enter a name for your report. Next time you need to run a report with the same criteria, click on the drop arrow at *Saved Selection*.

Click *Next*.

Step 2 - Select the report layout/format -

Under *Options*>choose *Basic* and click the drop arrow to choose a report format. Membership provides a default report called [Template] Basic Columnar Report or you may build a Basic Report of your own.



Basic Report - [Template] Basic Columnar Report

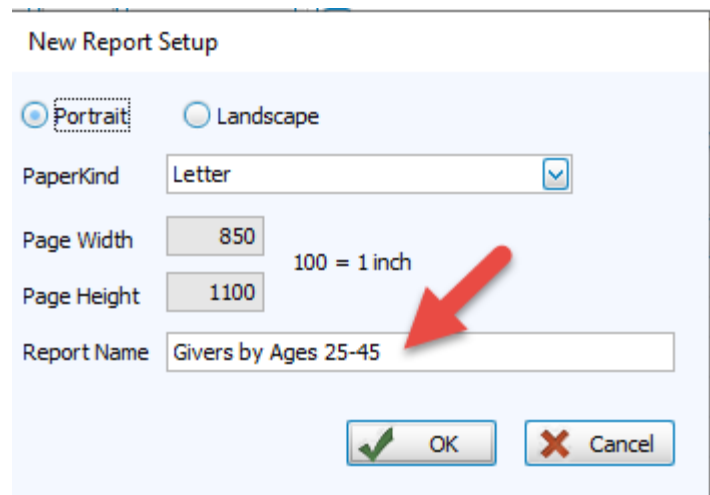
- Under *Options* tab, choose *Basic*.
- Choose the layout provided from the drop box, [Template] Columnar Report. This layout includes Name (Last, First), Address Block (current as of today) and Primary Phone.
- Click *Print*.

OR

Basic Report - New

Allows you to create a layout that includes fields other than those included on the template.

- Under *Options* tab, choose *Basic*.
- Choose the layout provided from the drop box, [Template] Columnar Report.
- Click *New*
- On the *New Report Setup* screen enter the *Report Name* and click *OK*.

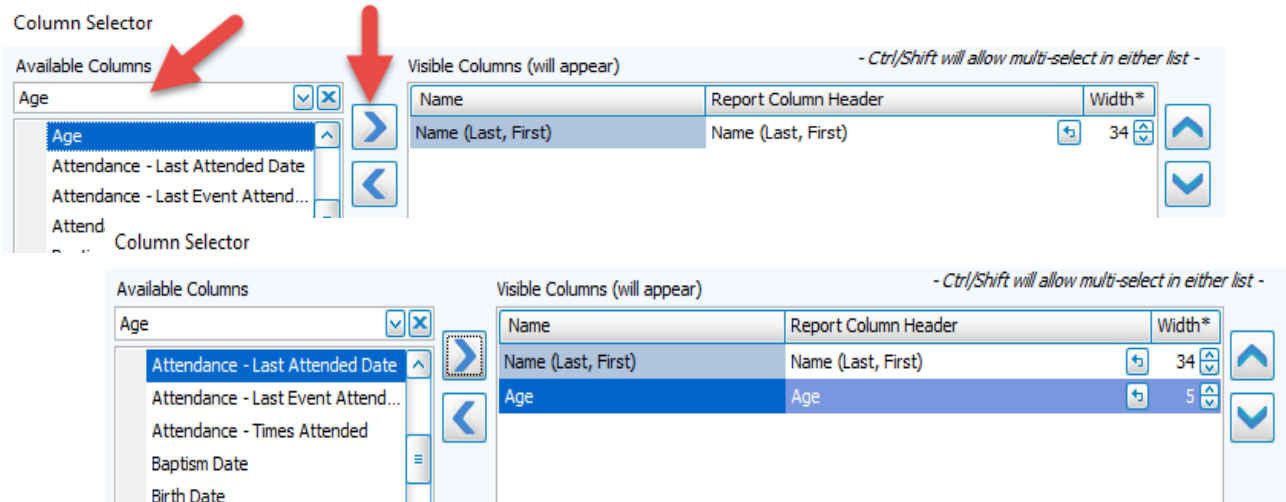


Use the *Column Selector* to choose the columns to appear on the report. The *Basic* report will default to *Name (Last, First)*, *Address Block (current as of Today)* and *Primary Phone*. Columns may be added or removed from the report format by clicking the left and right facing arrows.

- Available Columns on the left are possible fields available to appear on the report.
- Visible Columns on the right are the fields that have been selected to appear on the report.

To include *Name* and *Age* only for the example report.

- Under *Visible column*, highlight *Address Block* and click on the left facing arrow to move the column to the *Available Columns*, then highlight *Primary Phone* and repeat.
- At *Available Columns*, *Type to Search* enter the name of the field to be added, highlight it and click on the right facing arrow to move the column to *Visible Columns*.



- Once the columns appear under *Visible Columns*, click *OK* and *Print*

41st Church of Anytown	
Name (Last, First)	Age
ELLI, Anne [M]	45
ELLISON, Penelope [M]	32
FISHER, Jonathan [M]	39
FREY, Amanda [V]	37
LAWRENCE, Erin [M]	32
MORRIS, Scott [M]	37
OLIVER, Lenny [M]	26
PARISH, Jody [M]	27
PARKS, Donna J [M]	42
SMOOT, Ruth [M]	41

Please Note: Once a *Basic* report format is created it is saved and may be reused, no matter what criteria you select on *Step 1*.