

Membership

Version 22 & Newer

Basic Reports (Rev 3/20)

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).



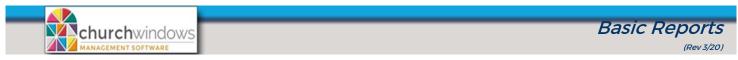
OR

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 Owen Duilden	🐼 STEP 1 - Select who should appear on the report	- • •
On the Query Builder	Query Builder Accounts Sort (Name: Last, First - Alphabetical)	
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.	Add a people selection. Select a join method. Then select one or more giving/pledging selections. I. Edit People Selection Criteria C. And/Or AND CR () Use Giver # Current as of 03/27/2020 v	
The <i>Sort</i> tab allows you to set the order the people will appear on the report.	Edit	Remove line
Use the Saved Selections to save the report criteria to be used again.		- Clear All
ayam.	Saved Selections Type to Search	Next



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.

- Edit People Selection Select a membership field, make selecti nd click Add Selection. 1. Choose Age Giver # Age Include those with # Include those without # Select operator and enter value(s) NOT 2. Choose between at 1 💭 🗙 to 999999999 💭 🗙 Giver # Range greater than equal to between Select operator and ~**×**+less than 🔘 is blank Named Range Type to Search enter value(s) 25 and 45 Categories Members [M] Visitors [V] 3. Fill in the age range \pm Selection Add: OR (membership Individuals fitting these criteria -- 5 4. Categories selected are Members & Visitors Include... Inactive 5. Click + Selection to Membership Groups Remove line confirm the selection Donations Individual Givers* Clear All -Donations Group Givers* These are not limited by membership 6. Click OK. field selections. ÷ OK × Cancel
- #2 And/Or choose AND (which is the default).
- #3 At Add Giving/Pledging Selection Criteria

		4 Add Giving/Pledging Query		– U X
		Giving - Include:	Rec. Statement - Include:	Gives w/ Family - Include:
		⊖ All	 All 	 All
		 Only those who gave 	Receives Statement	Gives w/ Family
		Only those with giving from 🔀 to 💌 🗸 No upper limit	O Does not Rec. Statement	Object Does not Give w/ Family
7.	Click on Only those	 Only those who did not give 		
	who gave		Date Range	8
	J.	AND 🖌	01/01/ v to 12/31	L/ Yr +Yr
8.	Set the Date Range	L		
		Pledging - Include:		
9.	Click +Add .	 All 	Those who:	
		Only those who pledged	Have met all pledges	
		Only those with pledging from to No upper limit	Have not met all pledges	
		Only those who did not pledge		
		With pledge type(s):		9
		🗹 Flat 🛛 Semi-Annual 🗹 Monthly 🔽 Bi-Weekly		
		🗹 Annual 🗹 Quarterly 🗹 Semi-Monthly 🗹 Weekly		
				- Add 🗙 Cancel

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*.

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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.

🐼 STEP 2 - Select the report layout/format						
Options	Giving/Pledging Date Range (01/01/20 - 12/31/20) Organization	n Info				
	c Custom Mail Merge/Export nformation Director Directory Export ate] Basic Columnar Rep	Report Options Grouping/Page Break Options Unlisted Options Include Family Category Codes Include year on Birth date Uppercase last name (selected) Only for children Include additional family members (linked from other households)				
	ports using the spouse/parents fields require 'Directory/Report Order' ed out correctly.	☐ For family pictures, use individual picture if not available Child Delimiter for Reporting: ☑ Semicolon ; ☐ Comma ,				
Select	Type to Search					
Print	Name	<u>ـ</u>				
	Evan Bernard [M]	<u></u>				
	Nikki Bernard [M]					
	Stewart Bernard [M]					
	Andrea Brown [V]					
	Joanne Clarkson [V]					
	Bella Cuckler [V]					
	Chris Day [M]					
	Trevor Dowd [V]					
	Abigail Elli [V]					
	Anne Elli [M]					
	Brian Elli [M]					
	Cody Ellison [M]	✓				
-	Back Check 'Print' for all Uncheck 'Print' for all	C Export Print				

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*.

New Report S	Setup
Portrait	C Landscape
PaperKind	Letter
Page Width	850 100 = 1 inch
Page Height	1100
Report Name	Givers by Ages 25-45
	V OK Cancel



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.

Basic Reports

- 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.

Column Selector	/						
Available Columns	•	Visible Colur	mns (will appear)	- (Ctrl/Shift will allow multi-seled	t in either list -	
Age		Name		Report Column Head	er	Width*	
Age		Name (Las	t, First)	Name (Last, First)	4 2	34	
Attendance - Last A Attendance - Last E Attend Column Se	vent Attend 🗕 🔽						
Available Co	lumns		Visible Columns (will appear)		- Ctrl/Shift will allow n	nulti-select in either list	-
Age			Name	Report Col	umn Header	Width*	_
Attend	ance - Last Attended Date	$\overline{\mathbf{N}}$	Name (Last, First)	Name (Las	t, First)	5 34 💭 🖍	
Attend	ance - Last Event Attend		Age	Age		5 🕀 🔽	
Attend	ance - Times Attended						
Baptisr	Date	=					
Birth D	ate						

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

41 st 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*.