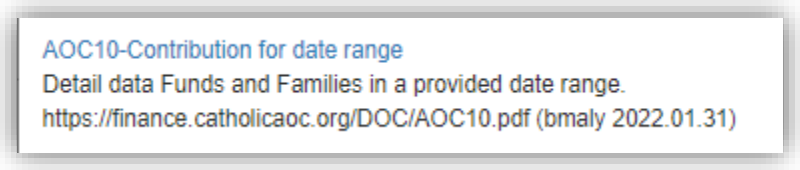
AOC10 – Contribution for date range

Detail list of contributions for selected Statuses, Tags, Date Range and Buckets/Funds. Can further filter for funds entered as batches (including 'import' batches) and those entered either through fund maintenance, with out a batch, or the historical converted data. (bmaly 2022.01.31)



Purpose – Detail list of contributions for selected Statuses, Tags, Date Range and Buckets/Funds. Can further filter for funds entered as batches (including 'import' batches) and those entered either through fund maintenance, without a batch, or the historical converted data.

- Scenario 1: you need to research historical contributions for a specific fund
- Scenario 2: you need to find the batch number for a family contribution entered in a batch so that you can 'unpost' and make corrections.
- Scenario 3: Analyze your data in excel (see below)

Parameters:

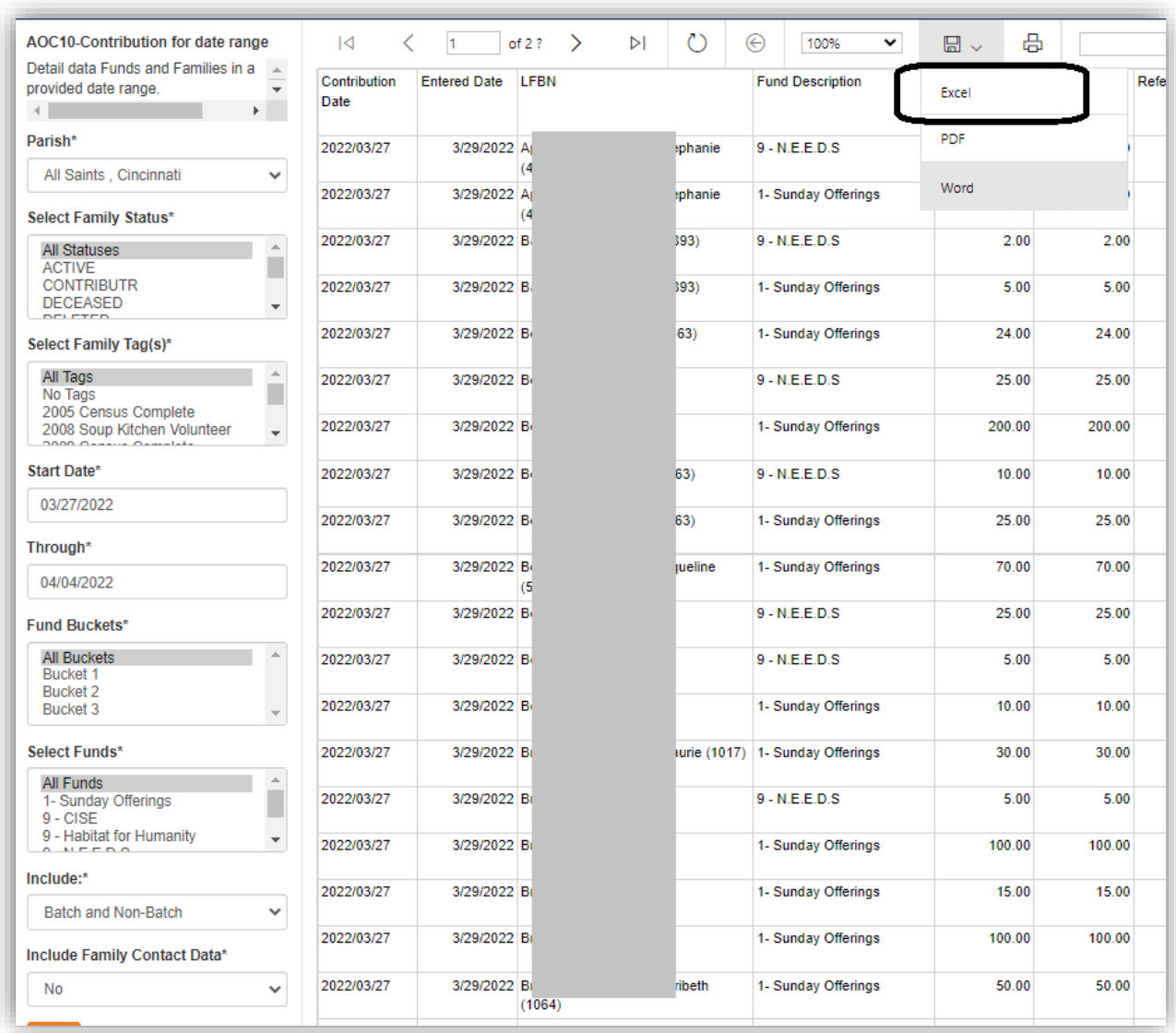
- Church
  - Select from your available parishes
- Family Statuses
  - Select one or more Family Statuses
- Family Tags
  - Select one or more Family Tags
  - Begin DateStart of date range
- End Date
  - End of date range
- Buckets
  - All, Bucket 1, Bucket 2, Bucket 3
- Funds
  - All or selected (select multiple using 'shift' or 'ctl' key.
- Include:
  - Non-Batch - Items entered in Fund Maintenance as a single item.
  - Batch – only items entered as a batch
  - Batch and Non-Batch – all contribution entries.

Results Explanation:

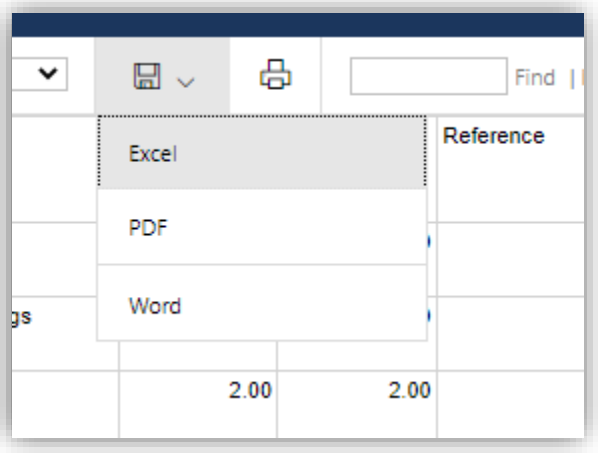
Columns

- Contribution Date
- Entered Date
- LFBN – Last First name and Budget (Envleope) Number

- Fund Description
- Gross Amount
- Net Amount
- Reference
- Comment
- Non-Deductible (False for no, True for yes)
- Batch ID
- Annual Contribution Bucket
- Entered By (user id creating the transaction)
- Entered Date

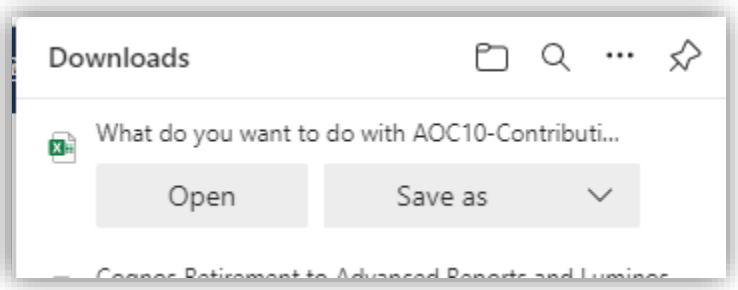


Advanced analysis in Excel: Access the Download to excel from the results header.

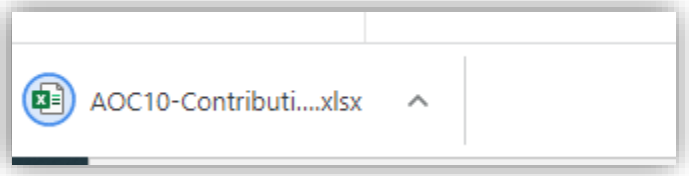


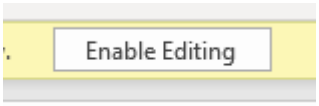
Depending on the Browser, your results will be available

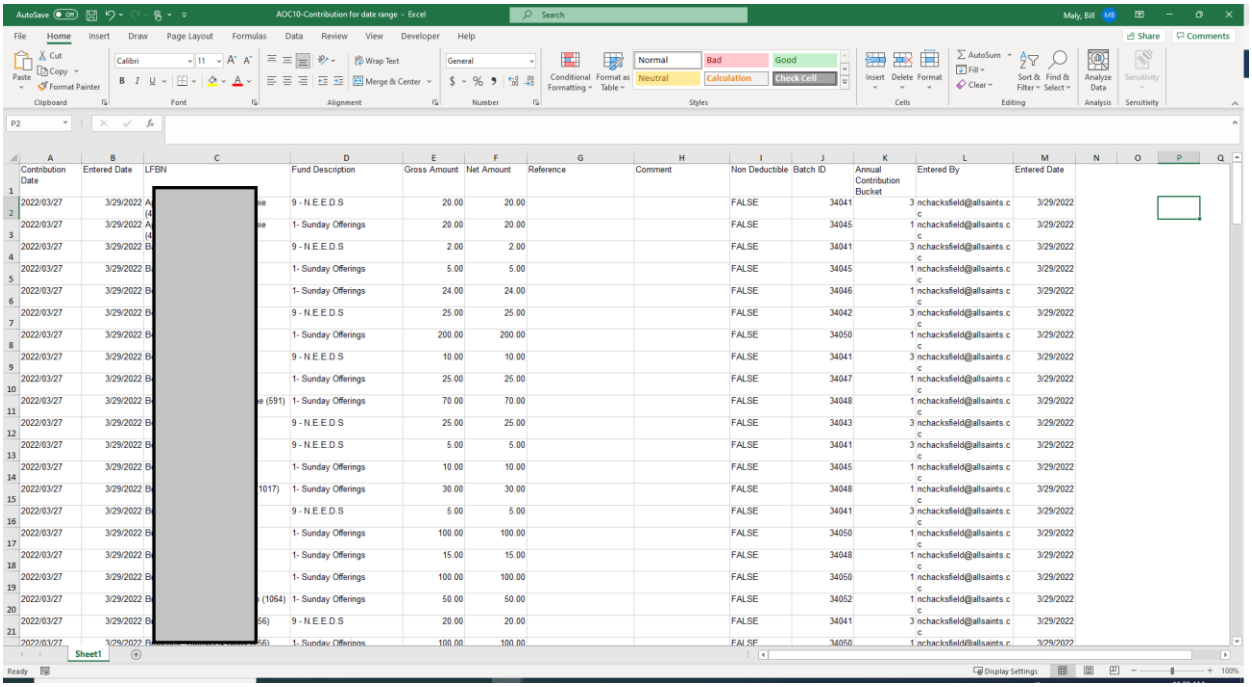
MS Edge Browser



Google Chrome Browser

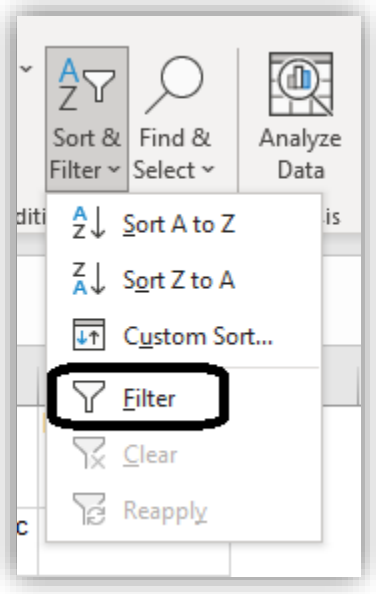


Click on the  in the ‘ribbon’



Contribution Date	Entered Date	LFBN	Fund Description	Gross Amount	Net Amount	Reference	Comment	Non Deductible	Batch ID	Annual Contribution Bucket	Entered By	Entered Date
2022/03/27	3/29/2022	[redacted]	9 - N.E.E.D.S	20.00	20.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	20.00	20.00			FALSE	34045	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	2.00	2.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	5.00	5.00			FALSE	34045	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	24.00	24.00			FALSE	34046	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	25.00	25.00			FALSE	34042	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	200.00	200.00			FALSE	34050	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	10.00	10.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	25.00	25.00			FALSE	34047	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	70.00	70.00			FALSE	34048	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	25.00	25.00			FALSE	34043	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	5.00	5.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	10.00	10.00			FALSE	34045	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	30.00	30.00			FALSE	34048	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	5.00	5.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	100.00	100.00			FALSE	34050	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	15.00	15.00			FALSE	34048	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	100.00	100.00			FALSE	34050	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		1- Sunday Offerings	50.00	50.00			FALSE	34052	1	nchacksfield@allsaints.c	3/29/2022
2022/03/27	3/29/2022		9 - N.E.E.D.S	20.00	20.00			FALSE	34041	3	nchacksfield@allsaints.c	3/29/2022

To enable sorting, click the 'Sort & Filter' menu item, then Filter.



This will provide a filter selection for each column of the data. One use would be to enter 50 on the Grow Amount column to find all the 50-dollar donations.