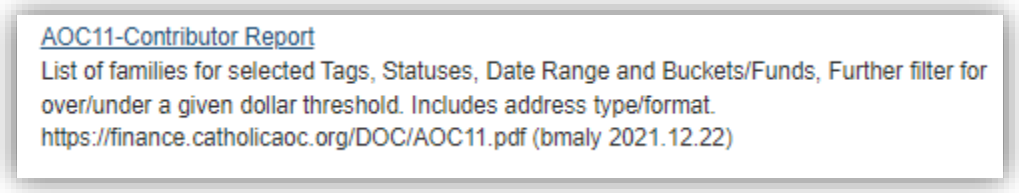
AOC11 - Contributor Report

List of families for selected Tags, Statuses, Date Range and Buckets/Funds, Further filter for over/under a given dollar threshold. (bmaly 2021.12.22)



Purpose – This report can be used to find family giving amounts for a period.

- Scenario 1: Zero givers for a period
  - Enter -1 Dollar Threshold
  - Select 'over' for the over/under
- Scenario 2: Find families with giving levels over a certain threshold
  - Enter a giving threshold
  - Select 'over' for the over/under
- Scenario 3: Find families with giving levels under a certain threshold
  - Enter a giving threshold
  - Select 'under' for the over/under

Parameters:

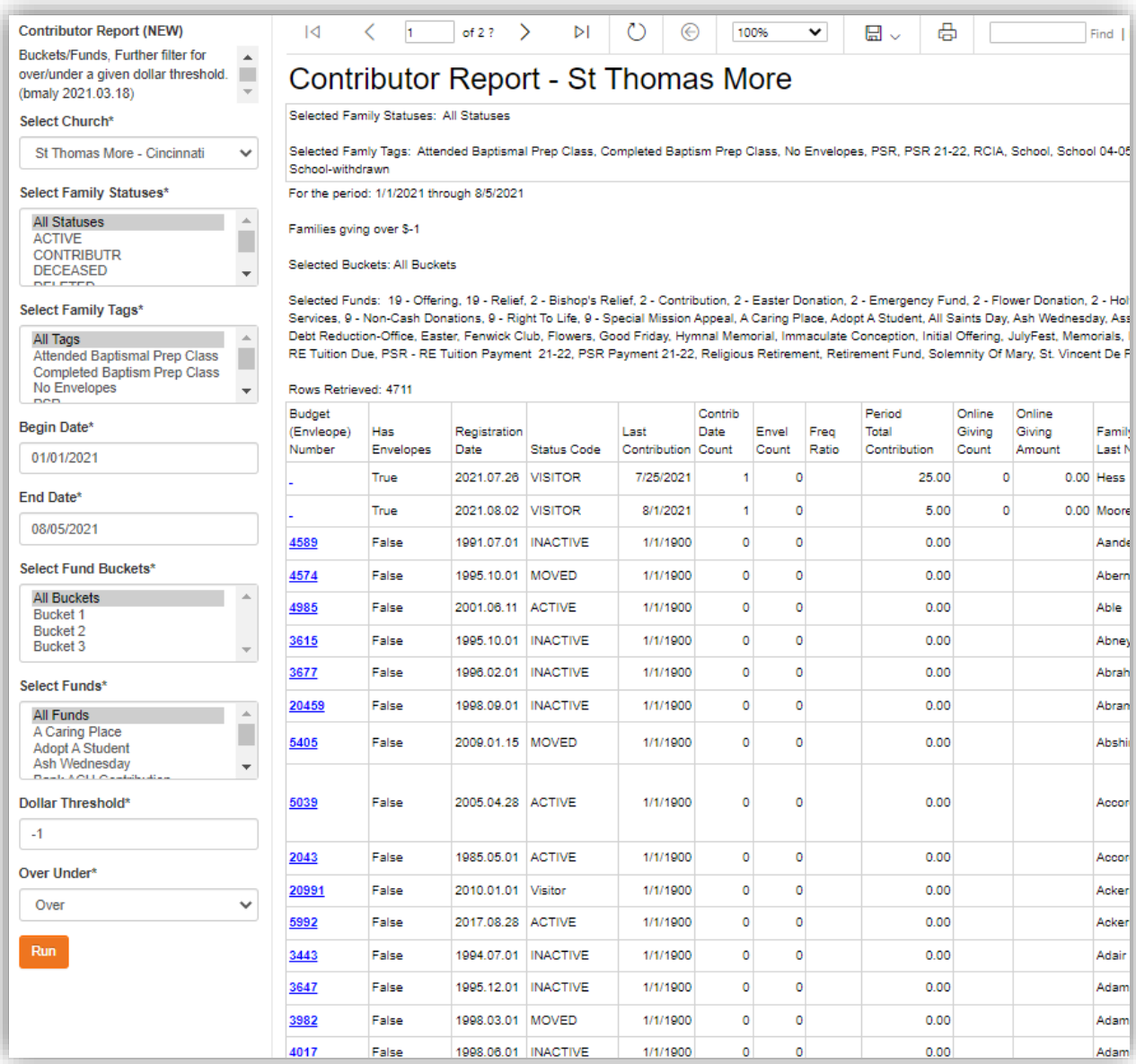
- Church
  - Select from your available parishes
- Family Statuses
  - Select one or more Family Statuses
- Registered?
  - Yes/no
- Family Tags
  - Select one or more Family Tags
- Begin Date
  - Start of date range
- End Date
  - End of date range
- Buckets
  - All, Bucket 1, Bucket 2, Bucket 3
- Funds
  - All or selected (select multiple using 'shift' or 'ctl' key.
- Dollar Threshold
  - Whole dollar
- Over Under
  - Select over/under

Results Explanation:

All the parameter selections are included in the header of the report.

Columns

- Budget (Envleope) Number - Hyperlink to the family record
- Has Envelopes – True or False indicating the 'Has envelopes' checkbox on 'Administration' tab under the family record.
- Registration Date – From the 'Administration' tab under the family record.
- Registered? - From the 'Churches' tab and the 'radio button' status (unregistered would be false).
- Status Code - Family Status
- Last Contribution – Last recorded contribution date.
- Contrib Date Count - Within the selected date range, how many contribution dates.
- Envel Count – For the contribution dates, how many entries.
- Freq Ratio – Ratio of envelope count to contribution dates.
- Period Total Contribution – total of all contributions in the select date range.
- Prior Period Total Contribution- total of all contributions in the prior analysis period.
- Percent Change Period – Period to period percent change.
- Online Giving Count – for the selected range, the number of transactions from online entries (indicated by 'imported' in the transaction detail
- Period Online Giving Amount – for the selected range, the sum of the transactions from online entries (indicated by 'imported' in the transaction detail
- Family Last Name
- Family First Name
- Street
- City
- State
- Zip Code
- Phone Number
- Email Address – From the family record
- Tags – all tags in which the family is found



Contributor Report (NEW)

Buckets/Funds, Further filter for over/under a given dollar threshold. (bmaly 2021.03.18)

Select Church*

St Thomas More - Cincinnati

Select Family Statuses*

All Statuses
ACTIVE
CONTRIBUTR
DECEASED

Select Family Tags*

All Tags
Attended Baptismal Prep Class
Completed Baptism Prep Class
No Envelopes

Begin Date*

01/01/2021

End Date*

08/05/2021

Select Fund Buckets*

All Buckets
Bucket 1
Bucket 2
Bucket 3

Select Funds*

All Funds
A Caring Place
Adopt A Student
Ash Wednesday

Dollar Threshold*

-1

Over Under*

Over

Run

1 of 2 ? 100% Find

Contributor Report - St Thomas More

Selected Family Statuses: All Statuses

Selected Famly Tags: Attended Baptismal Prep Class, Completed Baptism Prep Class, No Envelopes, PSR, PSR 21-22, RCIA, School, School 04-05 School-withdrawn

For the period: 1/1/2021 through 8/5/2021

Families giving over $-1

Selected Buckets: All Buckets

Selected Funds: 19 - Offering, 19 - Relief, 2 - Bishop's Relief, 2 - Contribution, 2 - Easter Donation, 2 - Emergency Fund, 2 - Flower Donation, 2 - Hol Services, 9 - Non-Cash Donations, 9 - Right To Life, 9 - Special Mission Appeal, A Caring Place, Adopt A Student, All Saints Day, Ash Wednesday, Ass Debt Reduction-Office, Easter, Fenwick Club, Flowers, Good Friday, Hymnal Memorial, Immaculate Conception, Initial Offering, JulyFest, Memorials, RE Tuition Due, PSR - RE Tuition Payment 21-22, PSR Payment 21-22, Religious Retirement, Retirement Fund, Solemnity Of Mary, St. Vincent De F

Rows Retrieved: 4711

Budget (Envleope) Number	Has Envelopes	Registration Date	Status Code	Last Contribution	Contrib Date Count	Envel Count	Freq Ratio	Period Total Contribution	Online Giving Count	Online Giving Amount	Family Last N
-	True	2021.07.26	VISITOR	7/25/2021	1	0		25.00	0	0.00	Hess
-	True	2021.08.02	VISITOR	8/1/2021	1	0		5.00	0	0.00	Moore
4589	False	1991.07.01	INACTIVE	1/1/1900	0	0		0.00			Aande
4574	False	1995.10.01	MOVED	1/1/1900	0	0		0.00			Abern
4985	False	2001.06.11	ACTIVE	1/1/1900	0	0		0.00			Able
3615	False	1995.10.01	INACTIVE	1/1/1900	0	0		0.00			Abney
3677	False	1996.02.01	INACTIVE	1/1/1900	0	0		0.00			Abrah
20459	False	1998.09.01	INACTIVE	1/1/1900	0	0		0.00			Abran
5405	False	2009.01.15	MOVED	1/1/1900	0	0		0.00			Abshi
5039	False	2005.04.28	ACTIVE	1/1/1900	0	0		0.00			Accor
2043	False	1985.05.01	ACTIVE	1/1/1900	0	0		0.00			Accor
20991	False	2010.01.01	Visitor	1/1/1900	0	0		0.00			Acker
5992	False	2017.08.28	ACTIVE	1/1/1900	0	0		0.00			Acker
3443	False	1994.07.01	INACTIVE	1/1/1900	0	0		0.00			Adair
3647	False	1995.12.01	INACTIVE	1/1/1900	0	0		0.00			Adam
3982	False	1998.03.01	MOVED	1/1/1900	0	0		0.00			Adam
4017	False	1998.06.01	INACTIVE	1/1/1900	0	0		0.00			Adam