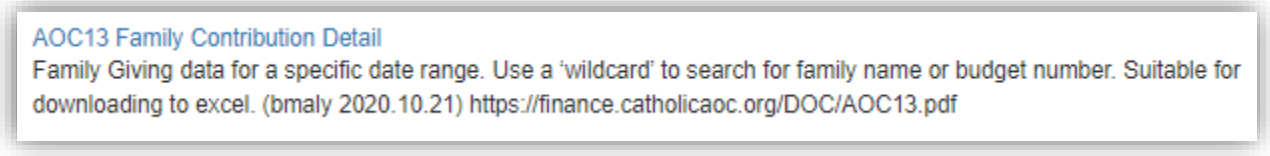
AOC13 – Family Contribution Details

Description - Family Giving data for a specific date range. Use a 'wildcard' to search for family name or budget number. Suitable for downloading to excel. (bmaly 2020.10.21)



Parameters:

- Church
- Family Tags
- Enter Name/BN Wildcard
- Select Donor
- Date From
- Date To

Purpose –Prepares detail listing of transactions for a family(ies) for a specific date range. Download to excel for further formatting, sorting and analysis. The Gabriel screens for contributions for the family are limited to 2 year lookback. This report will retrieve all the contributions for the date range you select.

Directions:

For family Tags, the default is 'All Tags'.

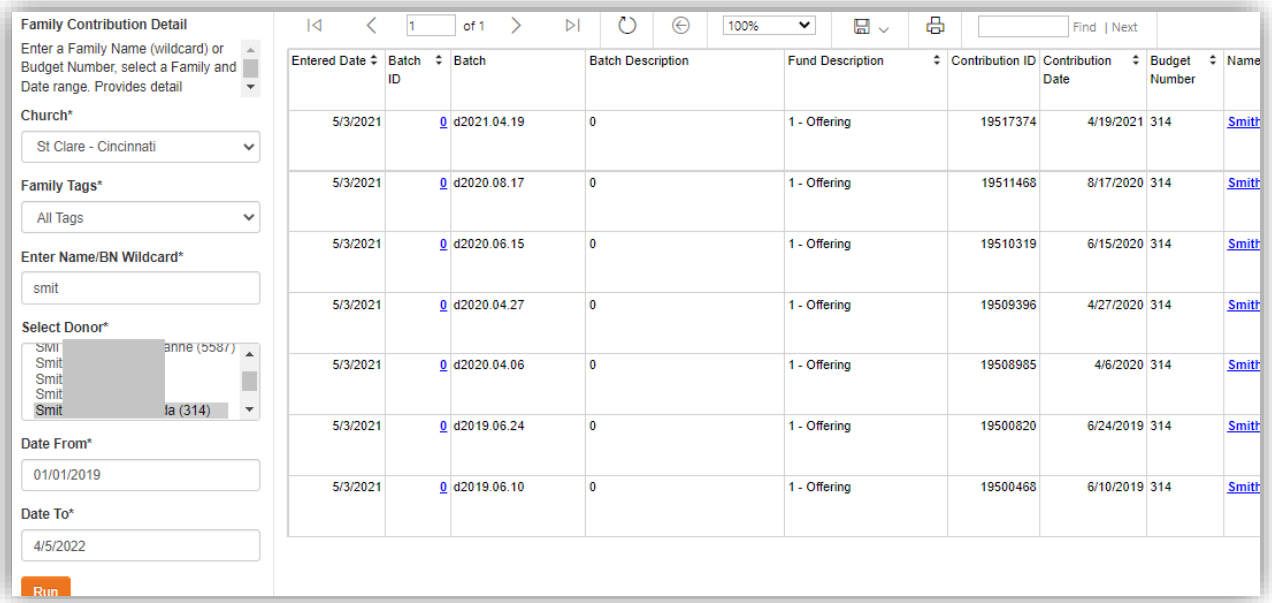
In the Name/BN Wildcard prompt, enter any part of a family name, or the Budget Number (envelope). Tab to the next field and a list of all families, filtered on the Family Tag prompt, will be available to select. This list of families is retrieved from the entire family list, including the 'non-givers' so your results may be blank if the family has never contributed.

You can use the 'click+cntl' to select multiple families in the list.

Once you select one or more families, select your date range.

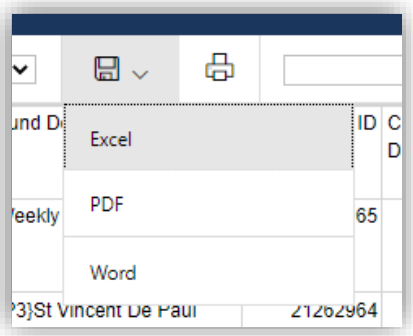
Columns Retrieved

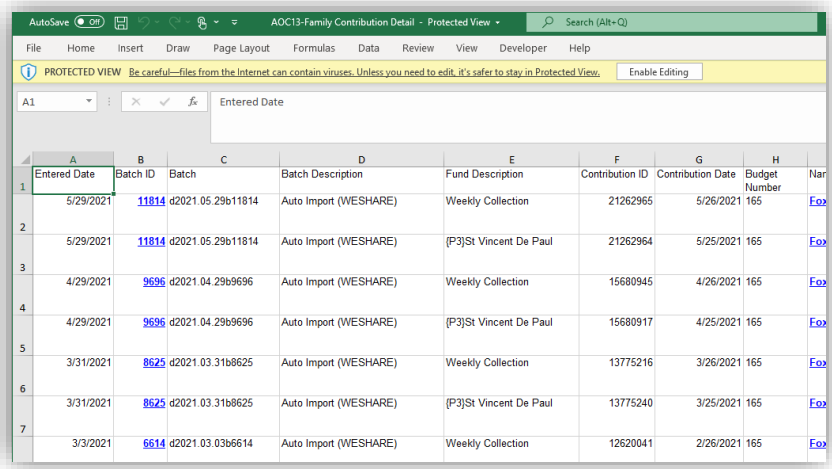
Entered Date
Batch ID
Batch
Batch Description
Fund Description
Contribution ID
Contribution Date
Budget Number
Name
Family ID
Reference
Comment
Non Ded
Gross Amount
Net Amount
Non Deductible Gross Amount
Non Deductible Net Amount
Email Address
Address
Entered Date
Entered By



Downloading the information to Excel

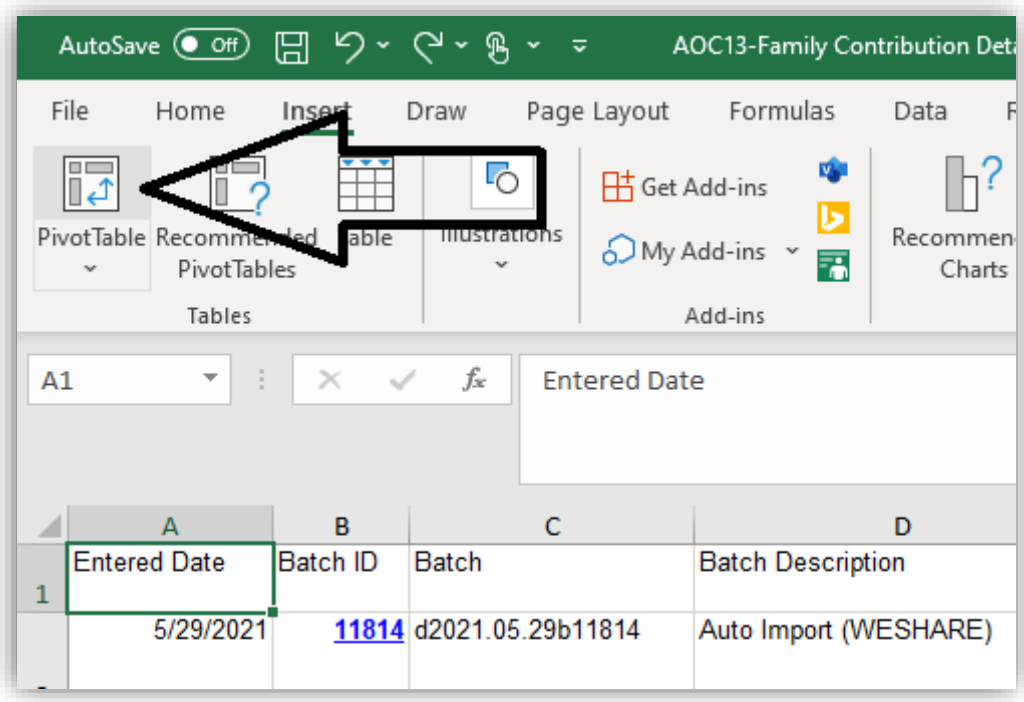
Click on the 'disk'



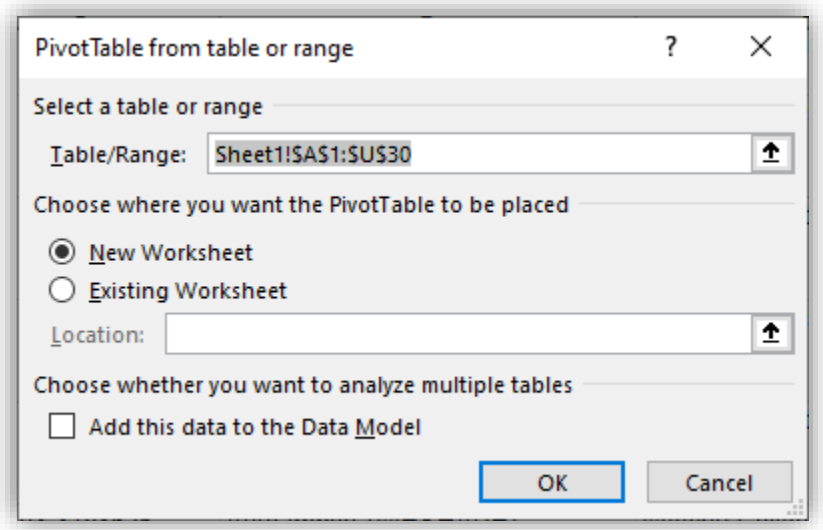


Open the downloaded workbook and enable editing.

Create a Pivot-Table: Click on Insert, Pivot Table.

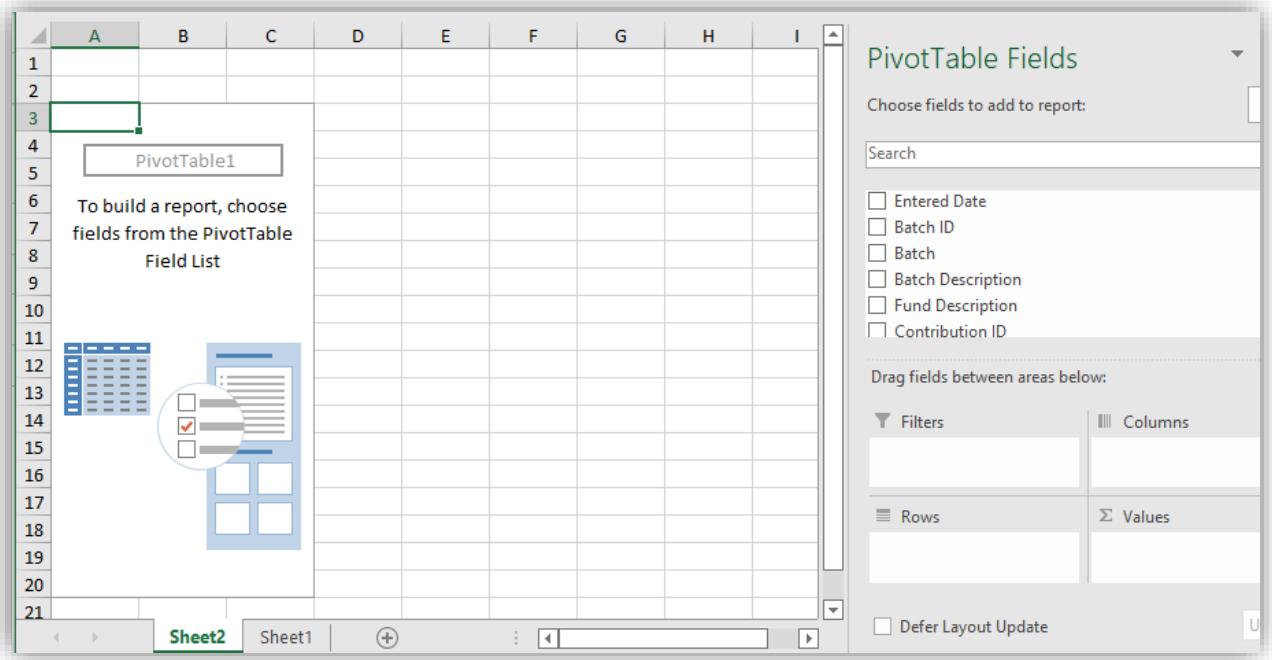


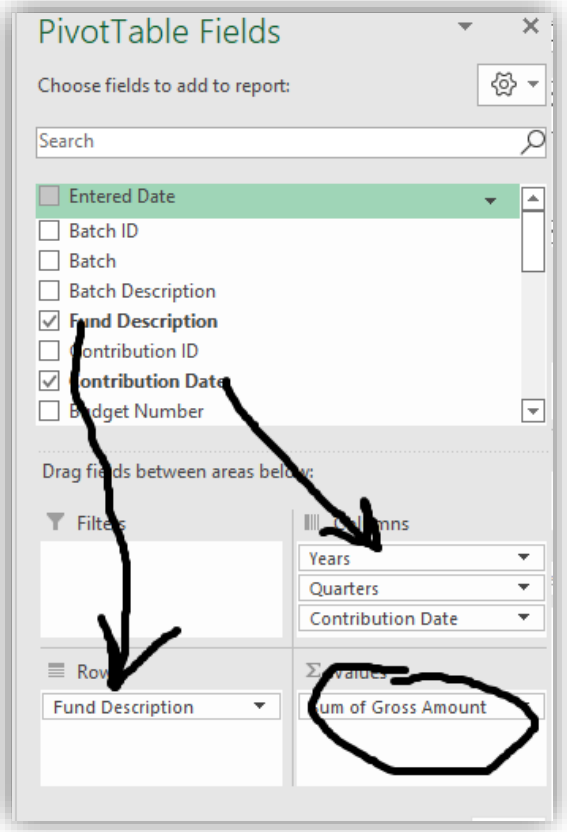
This will pop up…



Just Click OK.

A new ‘Sheet2’ will be created.



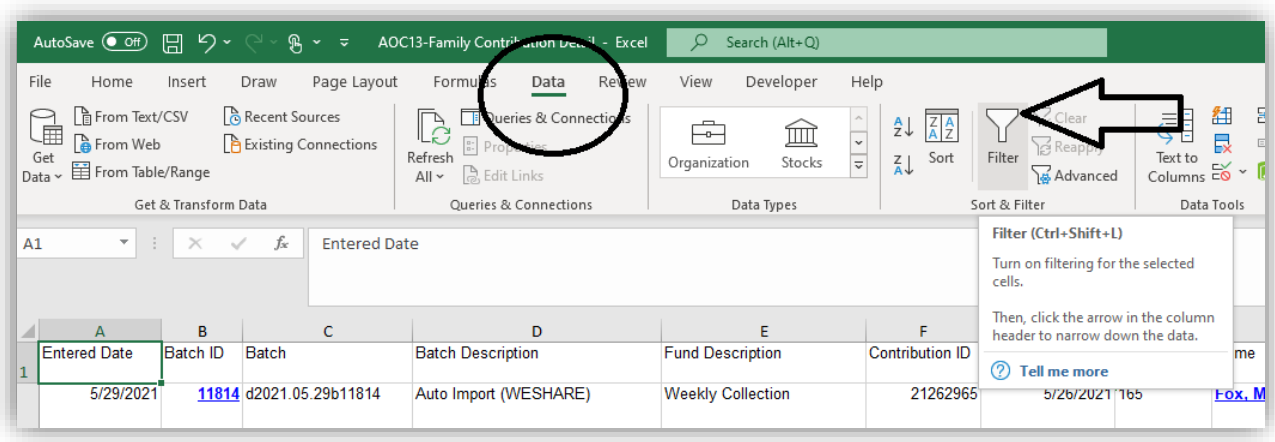


Next, click and drag the fund description to the Rows box. Click and drag the Contribution Date to the Columns box. Last, find the Gross Amount in the list and click and drag it to the Values box.

The pivot table will look something like this, depending on the data in the workbook.

Sum of Gross Amount	Column Labels		
	2020	2021	Grand Total
Row Labels			
{P3}Christmas Kindness	50		50
{P3}St Vincent De Paul	300	125	425
Weekly Collection	900	375	1275
Grand Total	1250	500	1750

Filter in the workbook: Click on the Menu/Data, then Filter.



On the top of each column will be a drop-down arrow. You can use this to filter your data.

