


Custom Listing Enhancements

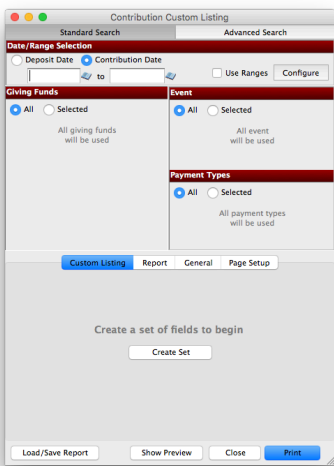
Created by Alex Clay on Dec 28, 2015

CDM+ 9.3/DonorWorks 9.1 adds column and grand totals and a minor interface refresh to custom listings throughout the program.

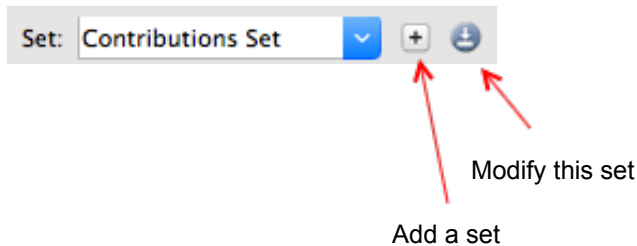
Interface Changes

 Where appropriate, these interface changes affect export reports as well.

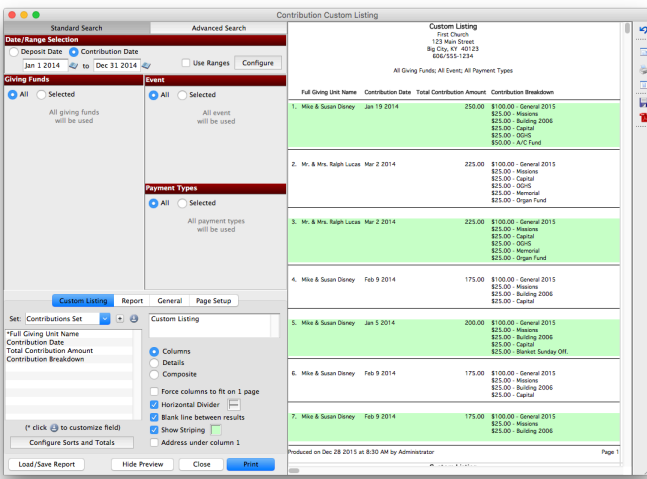
When a custom listing does not yet have any column sets, the message to create a set is clearer.



Once a set is created, you will see a number of changes. The buttons to add and change a set have been replaced with icons to give the set drop list more space.

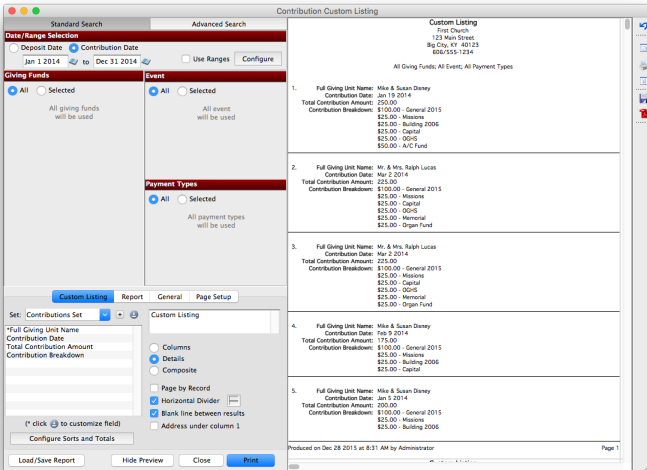


The list of columns in the selected set has been enlarged, and the button to configure sorts has moved below this list. This ensures the left side of this options pane is consistent between custom listings and exports.



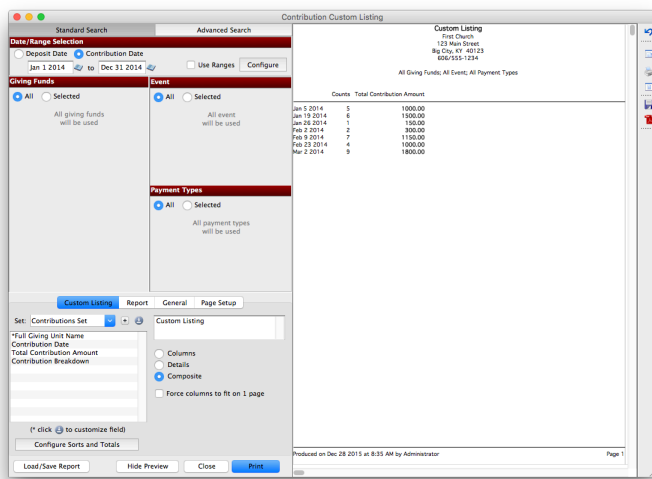
Details

Details prints each column on a row by itself, optionally producing a new page for each record. This setting is similar to the pivot option in previous versions and works well for a large number of columns.



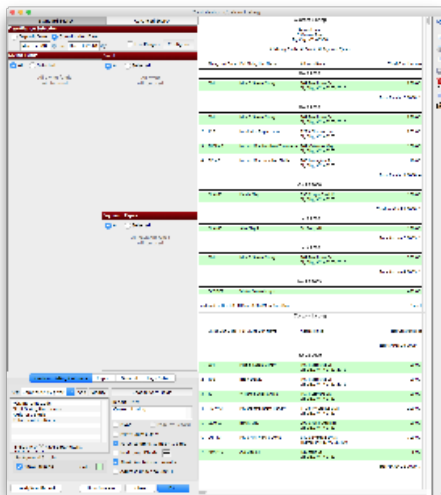
Composite

Composite is similar to the print counts only option in previous versions. It is recommended to subtotal by one or more columns when using composite.



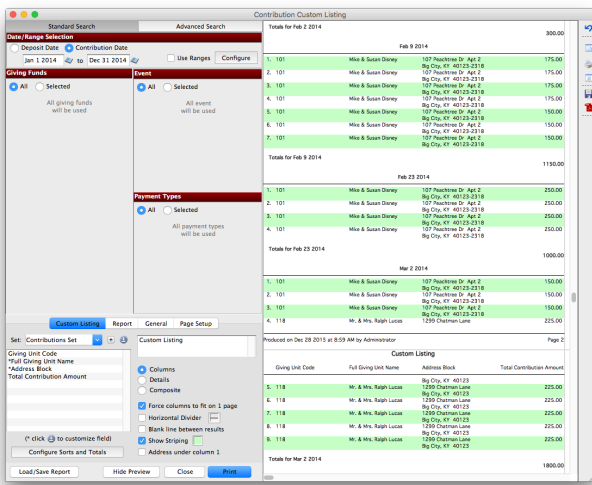
Totals

Previous versions of CDM+ and DonorWorks 9 would only print a total number of records when subtotaling by one or more fields. Here is an example of a Contributions Custom Listing from CDM+ 9.2.17 subtotaled by contribution date.

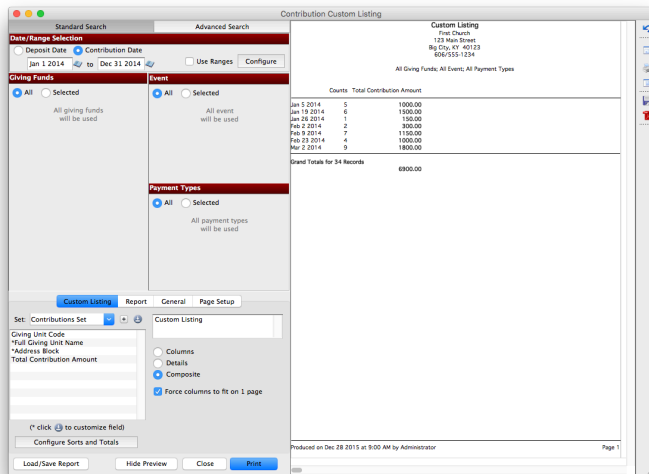


This report shows there were four gifts on March 9, 2008, but a frequent request from users was to see the total contributions for that date. Also, since the line numbering resets with each date, there is no final count to show the number of records displayed on the entire report.

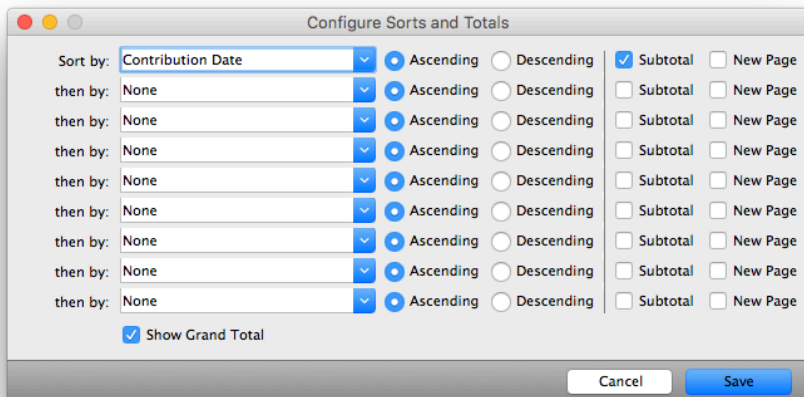
CDM+ 9.3 and DonorWorks 9.1 will now total and two decimal place columns and can optionally display a grand total for the entire report. Here is a similar report in CDM+ 9.3.



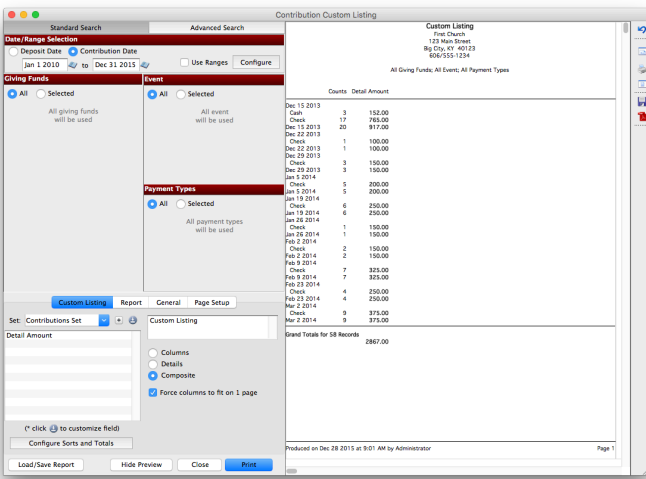
Switching the report type to composite provides a clean total by date.



Click **Configure Sorts and Totals** and check or un-check **Show Grand Totals** to turn grand totals on or off.



When subtotalling by multiple columns, totals will be calculated for each subtotal level.



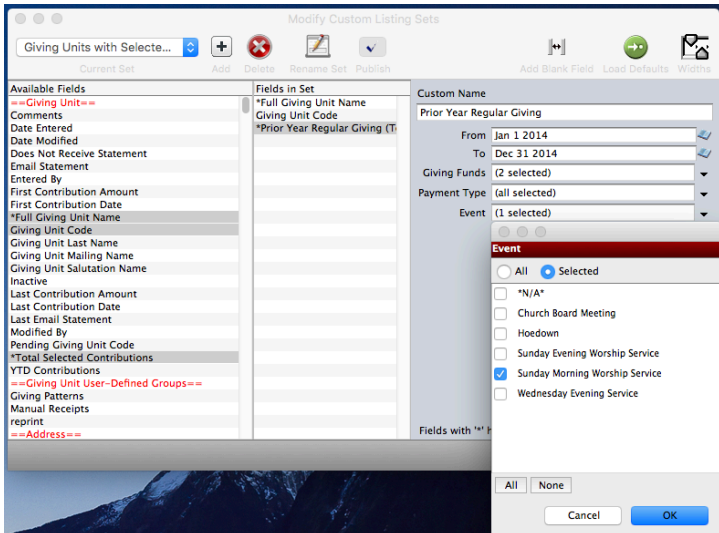
New columns

Contributions custom listings and exports have gain several new columns. DonorWorks 9.1 users in particular will be interested in new columns for generating pledge statements or analyzing gifts by appeal (event).

Total Selected Contributions

This customizable field can be added to any custom list or export than can output giving units. Use it to display total giving for the giving unit filtered by:

- Date range
- Giving Fund
- Event
- Payment Type



Pledge statement columns

Pledge records gain these columns to aid the user in creating a pledge statement.

- Next payment due date
- Next payment amount
- Last payment date

- Last payment amount
- Remaining pledge balance to be paid (Total Pledge minus Total Giving)
- Date completed (the date when the total giving first met or exceeded the total pledge)

Pledge Breakdown Summary

A new Pledge Breakdown Summary column shows how a pledge is configured to be given. Consider this pledge:

The screenshot shows the 'Pledge Records' window. At the top, it displays the giving unit 'Mike & Susan Disney' with a total pledge amount of 5000.00. Below this, there are fields for 'Pledge Start' (Dec 20 2013) and 'Pledge End' (Dec 19 2014). A summary table shows: Goal Amount: 0.00, Total Amount Entered: -5000.00, and a balance of -5000.00. The main section is titled 'Pledge' and shows a breakdown table:

Code	Name	Start Date	End Date	Date Received	Projected
101	Mike & Susan Disney 107 Peachtree Dr. Apt 2 Big City, KY 40123-2318	Dec 20 2013	Dec 19 2014	Nov 10 2013	<input type="checkbox"/>

Below the table, there are buttons for 'Add', 'Multi-Add', 'Change', 'Delete', and 'Print'. A summary at the bottom indicates 'Total: 5000.00 - Initial amt.: 0.00 = 5000.00 remaining'.

A receipt email or letter for this pledge could be configured to show a summary of the breakdown as follows.

The screenshot shows a 'Pledge Letters' window with a sample letter. The letter is addressed to 'Dear Mike & Susan,' and expresses gratitude for their 5000.00 pledge. It includes a breakdown of the pledge:

384.61 Monthly from Dec 20 2013 to Nov 30 2014
 384.68 One time from Dec 1 2014 to Dec 19 2014

The letter concludes with 'May God bless your faithfulness to His kingdom.' and is signed 'Sincerely, Dean Patterson, Pastor Dean'.

Page viewed 9 times by 4 users since Dec 28, 2015

Like Be the first to like this

No labels