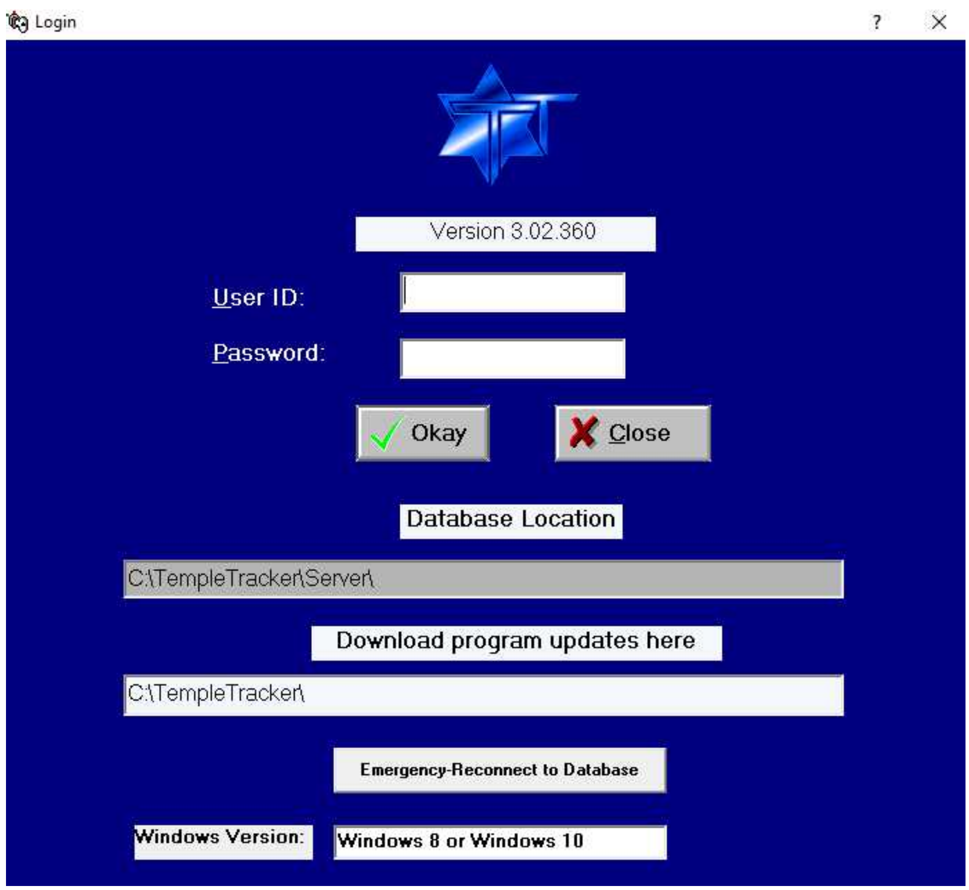
TEMPLETRACKER FOR WINDOWS TUTORIAL

Getting Started

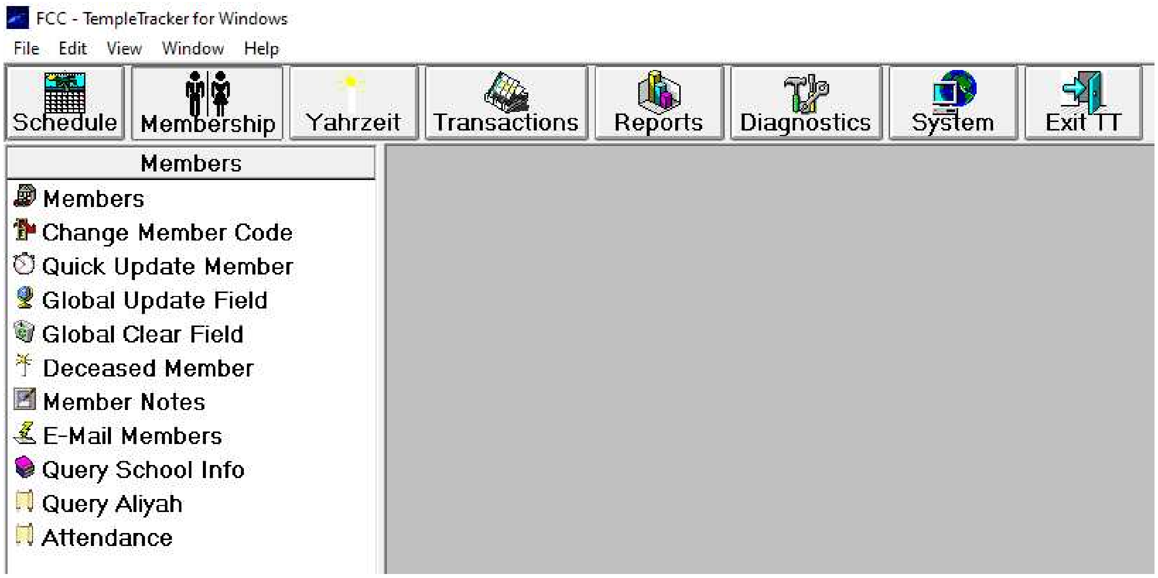
In this tutorial, we will step through the principal operations of the TempleTracker system for Windows. We will set up a password to enter the system and set up basic user-defined membership fields for later use. We will then add members, their demographic data, participation in committees, and their interests. Next we will walk through setting up funds for the system and assessing individual members as well as groups of members at one time. Finally, we will design and print simple reports.

After installing and running your TempleTracker system, you will see the following screen:

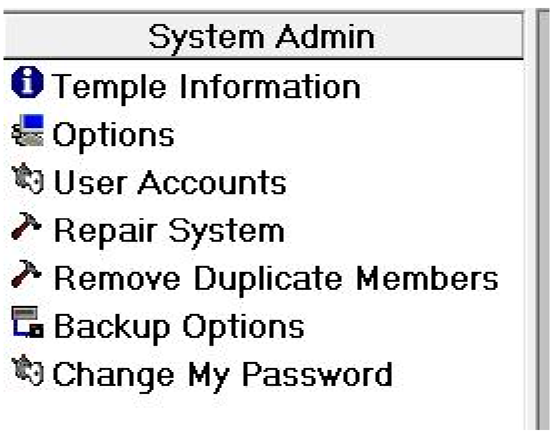


If you have the demo version, or a new system, your User ID is "a" and your password is "a." User a has full rights, including the ability to set up new users. Typically, one would set up new users making sure at least one user had rights to set up new users, and then delete user a.

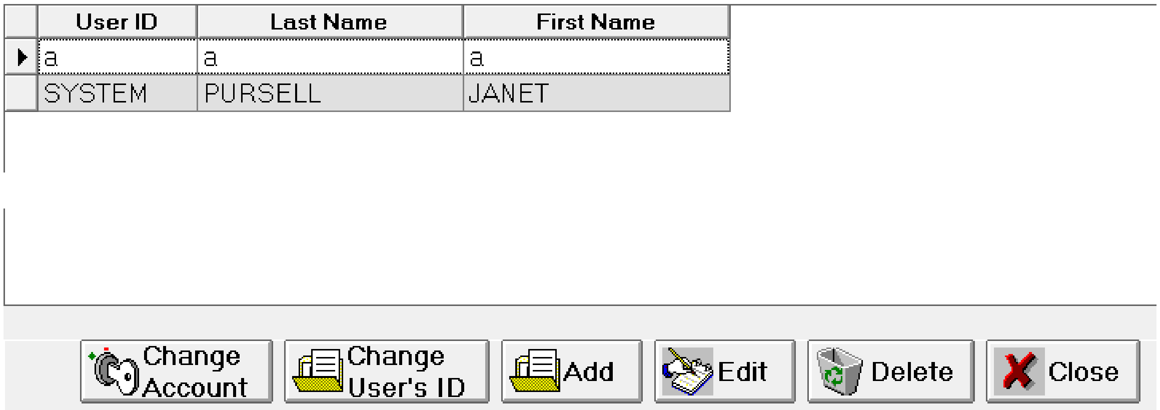
Let's start by setting up a new user. After entering the system, this screen displays.



Click [System] on the top, and then click [User Account]

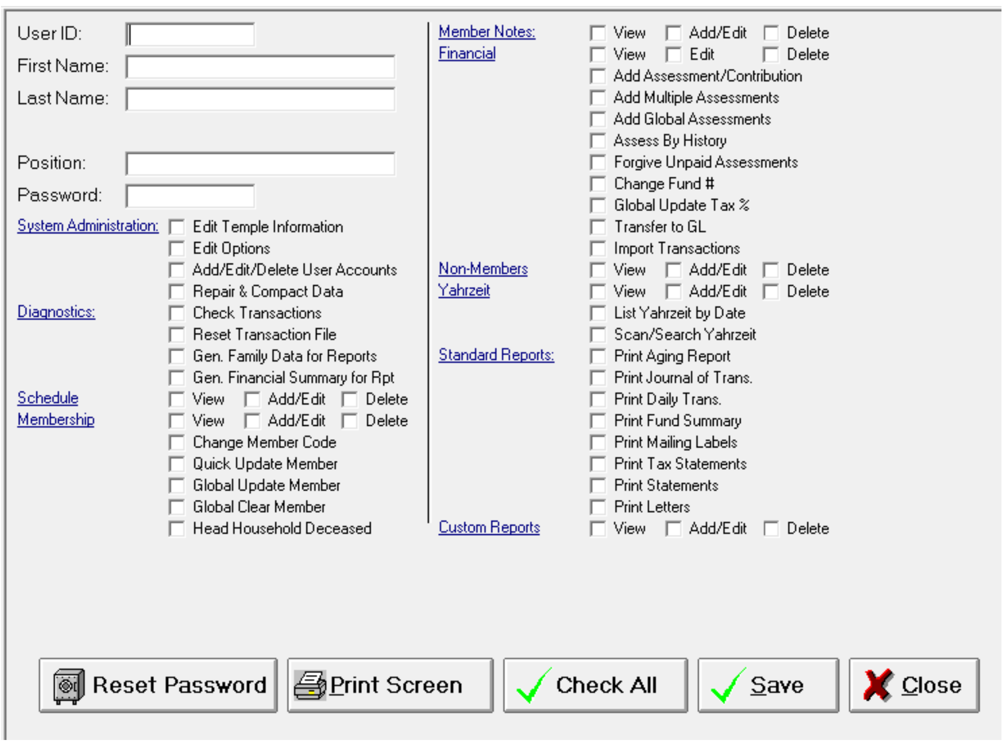


A list of current users will display

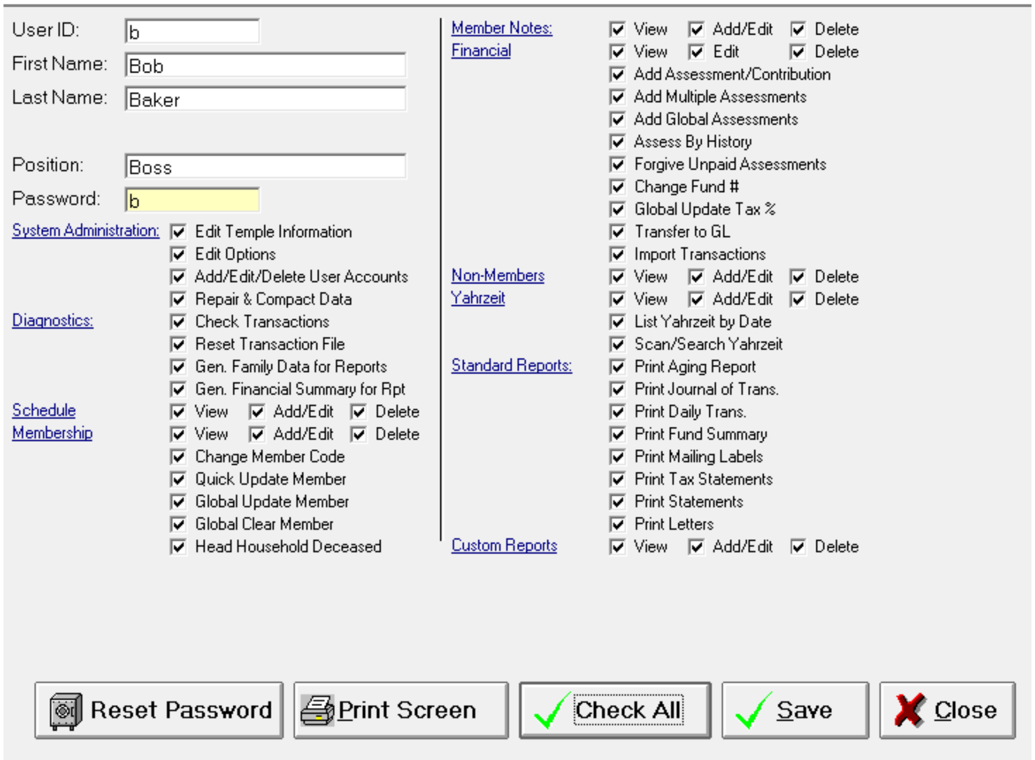


With buttons to Add a new user, or edit or delete an existing user. Click [Add]

The system displays a screen with checkboxes for specific rights.



Here we have set up user b with a password of b and used the [check all] button to give rights to everything. For a typical user, you might check all, then uncheck the rights not applicable to this user. Then click [save] and [close].



And the new user is in the list

User ID	Last Name	First Name
a	a	a
b	Baker	Bob
SYSTEM	PURSELL	JANET

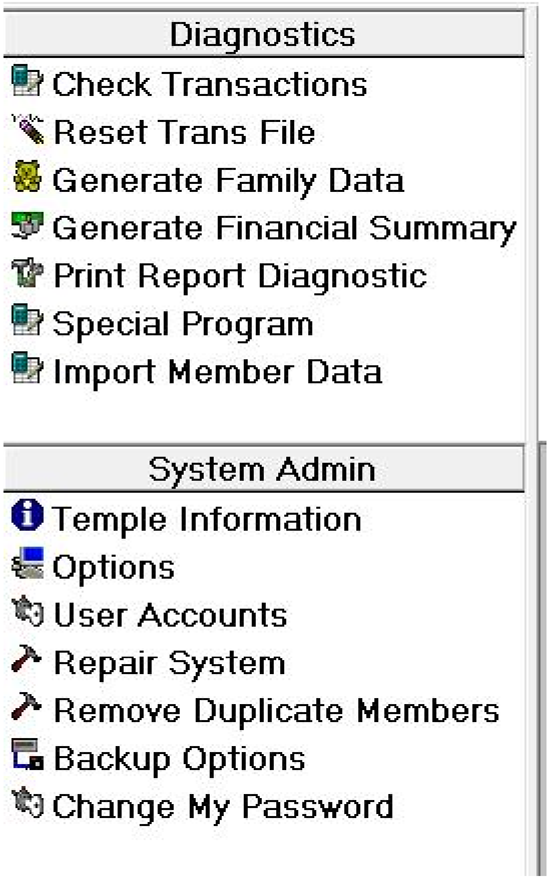
Configuring the System

We return to the TempleTracker Main Menu, as shown below:

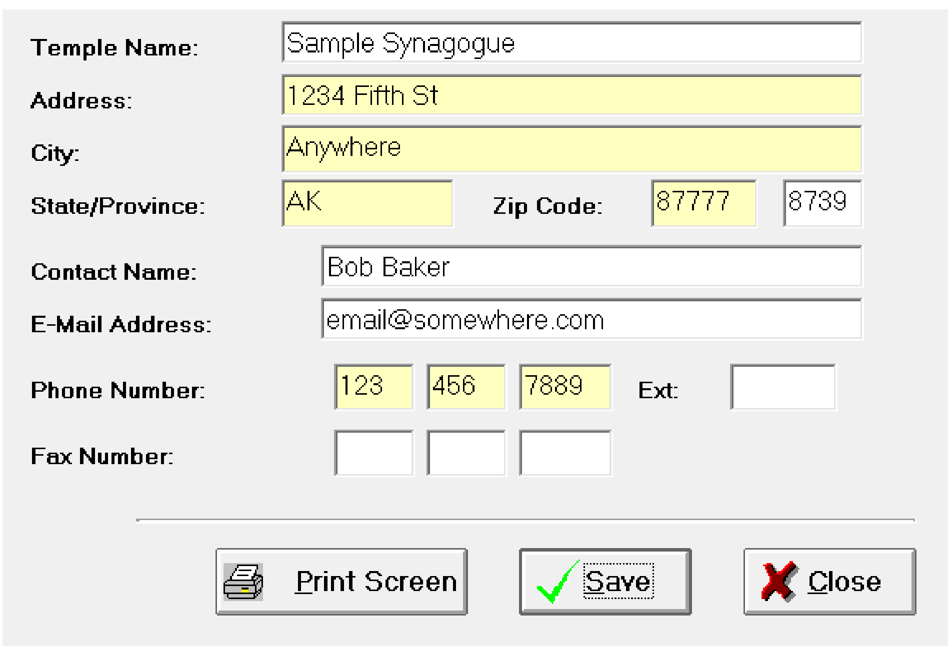
To get acquainted with the functions of the software, click each of the buttons (except Exit),

Transactions
Add Assess. and Contrib.
Add Receipts - Auto
Add Receipts - Manual
Credit Card Payments
Fix Credit Card Errors
Multiple Assessments
Global Assessments
Assess by History
Forgive Unpaid Assess.
Transfer to General Ledger
Import Transactions
Change Fund Number
Combine Transactions
Global Update Tax %

Reports
Custom Reports
Mailing Labels - Rolodex
Aging Report/Receivables
Journal of Transactions
Daily Transactions
Fund Summary
Tax Statements
Statements
Yahrzeit
Processing Logs
Canada Tax Stmts
Offload Members to CSV

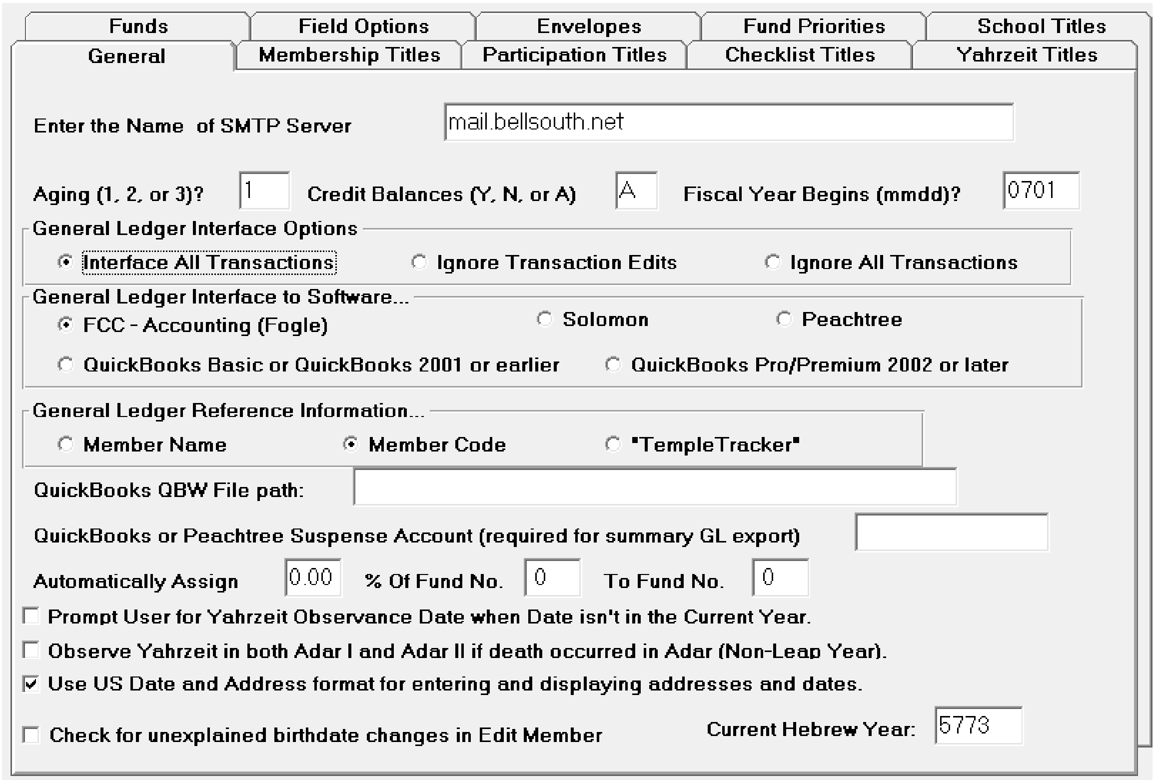


To start, click [System] then [Temple Information]. Fill in this screen and click [save] and [close]



Next click [System] [Options]

This will take you to the Configuration screen which includes file tabs at the top to select one of the screens. This is the [general] tab.



SMTP server. Get this name from your email setup, or leave blank.

Aging:
The next field allows you to set the time periods for your aging reports. The options available are 1, 2, and 3. Enter a "1" to print reports for aging periods of 30, 60, and 90 days. Enter a "2" to print reports for aging periods of 1, 2, and 3 years. Entering a "3" allows you to determine your aging periods at time of printing. (Aging reports are printed by using the Reports option at the top of the Main Menu. You can always overwrite your aging periods at print time but the option entered here will provide a default value.) Enter a "1" here and move to the next field.

Credit Balances:
This field allows you to decide how credit balances are handled on your Aging Reports and Statements. A "Y" prints credit balances on aging reports and statements. It also causes the system to use a credit balance in one fund to offset an amount due in another fund when computing the total amount due. A "N" causes no credit balances to be printed on reports and no offsetting of other funds. An "A" will cause the system to print

credit balances on reports but not to use a credit in one fund to offset a balance due in another fund. Enter your choice and move to the next field.

Fiscal Year End:
Enter the month and date your fiscal year begins.

General Ledger Code:

If you are interfacing with the FCC Accounting system or QuickBooks, click interface All, otherwise click Ignore all transactions.

General Ledger Interface:
Select FCC Accounting or Quickbooks Basic (ignore the other obsolete options). If you clicked Ignore above, then this selection is ignored.

General Ledger Reference:
If you are using the FCC Accounting package, a reference is printed with each transaction. You can choose what you want to have printed with each transaction on the General Ledger reports, Member's name, Member's Family and Member Code, or just the word TempleTracker on all transactions.

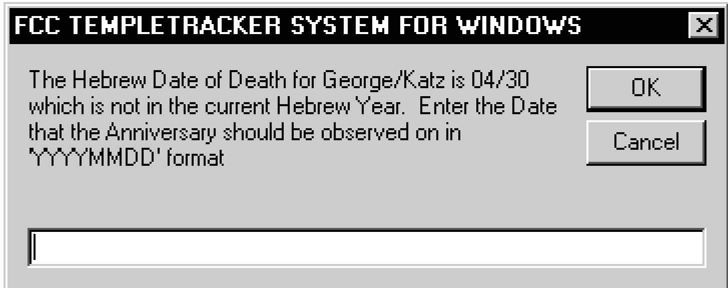
Ignore the Quickbooks QBW Path. Not used.

Suspense Account.

Due to a Quickbooks requirement that all incoming transactions must be in pairs and must be balanced, you have to set up a suspense account in Quickbooks and enter that account number here. The suspense account will always remain at zero after a group of transactions.

Skip the **Automatically Assign** section for now since we do not have any fund numbers set up. If we wanted to automatically assign 5% of our Member Dues Fund to go directly into our Building Fund, we could set that up here.

Prompt User for Yahrzeit Observance Date when Date isn't in the Current Year:
This field allows you to decide if you want the system to automatically assign an observance date or ask the user to enter the observance date manually if the Hebrew Date of Death is not in the current Hebrew Year. For example, if the Hebrew Date of Death is Tevet 30 and there is not a Tevet 30 in the current Hebrew year, the system will automatically assign the next day, Shevat 1, as the date of observance. However, if you have checked this box, the system will prompt you to enter a date if, for example, you are trying to print a report with Date of Observance but the Date of Observance is invalid for the current year. Before sending your report to the printer, the screen below will appear:



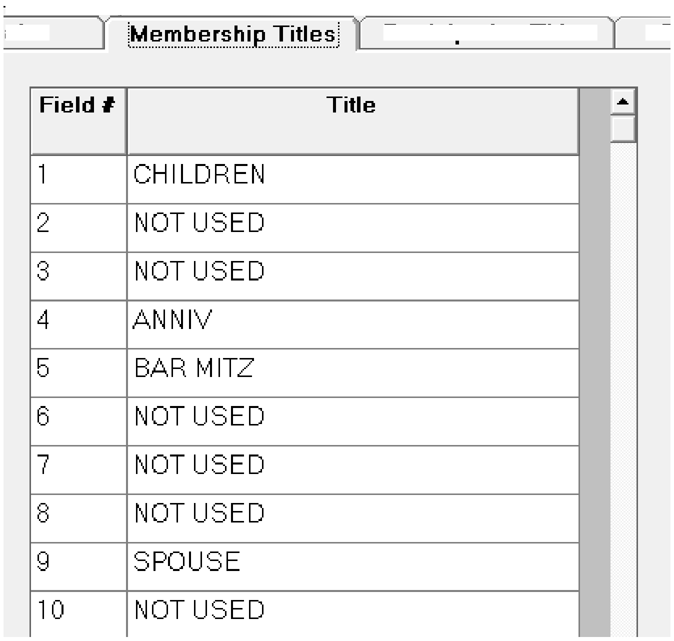
Observe Yahrzeit in both Adar I and Adar II if death occurred in Adar (Non-Leap Year):
Checking this box causes the system to assign two dates of observance if the death occurred in Adar in a Non-Leap Year but the current year is a Leap Year. One notice will print in Adar I and the next in Adar II.

Use US Date and Address format for entering and displaying addresses and dates:
Checking this box will cause dates to be displayed in MM/DD/YYYY format. Leaving it blank will cause dates to be displayed in YYYY/MM/DD format.

Check for unexplained birthdate changes. In a networked system, the network can become overloaded causing only a part of a member's data to be retrieved from the file during editing. This can cause the birthdate to change to zero. So, if networked, you should check this box.

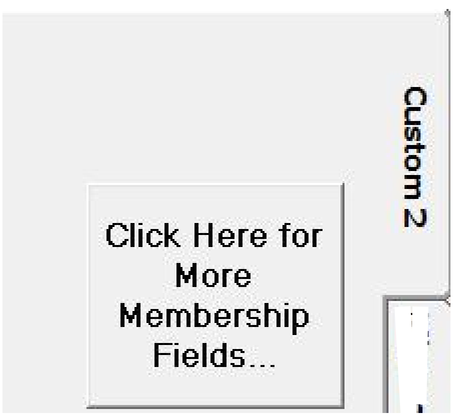
Current Hebrew Year. This is necessary for the Yahrzeit module. We can't set this automatically because some users print Yahrzeit notices a week in advance, and others print them 2 months in advance. Just set the Hebrew year for the notices you are about to print.

Membership Titles



Field #	Title
1	CHILDREN
2	NOT USED
3	NOT USED
4	ANNIV
5	BAR MITZ
6	NOT USED
7	NOT USED
8	NOT USED
9	SPOUSE
10	NOT USED

These fields are described in the manual, but if you want to see where a field appears, change the name, for example, field 10 to "FLD 10" and look on a member screen to see where it appears. There are 40 fields, and the numbers 21 and higher are large 55 character fields, displayed under [Custom 2] [Click here for more membership fields]



Fields 29, 30, and 31 are fixed and cannot be changed by the user.

Field #	Title
28	
29	Cell Phone
30	E-Mail
31	2nd email
32	
33	
34	
35	
36	
37	
38	
39	
40	

There are 40 user defined fields described below that you can use to keep track of information that is not already built into the system. Once you set up a field, the system can use the information entered in that field for each member to generate reports and merge it into letters. These are checkmark fields, either checked or not checked.

Each field is a different length and type, i.e. some are numeric fields which should be used for dates, some are 40 characters in length and should be used for large data such as Hebrew Name, spouse's name, child's name, and so on. Some are 5 characters in length, some 10 characters, etc. Before defining your own fields, you will need to think about the length and type of information that you are saving and choose the best field to store that data. There are also 20 fields (numbers 21 thru 40) that are 55 characters in length.

The following list shows the field and the maximum length and type of data associated with it in the Membership file. Your descriptive titles for the data, which you enter here, can be up to 12 characters for each field.

"**1.**", "**2.**", and "**3.**" – These three fields can be a maximum length of 5 characters each when you fill in the information on the membership screen.

“**4.**”, “**5.**”, and “**6.**” – These three fields are used to store non-standard dates. They are commonly used for information such as “Bar/Bat Mitzvah”, “Anniversary”, and “Resigned” Dates.

“**7.**”, “**8.**”, “**9.**”, and “**10.**” – These four fields are each 10 characters long.

“**11.**” - The maximum length for this field is 40 characters and it is occasionally used for “Hebrew Name” or “Spouse’s name”.

“**12.**” – This is a one character field. This field, often used for “Financial Code”, is a special field in the TempleTracker System. This field has a “Drop-Down” associated with it, meaning you can create a list of valid values that the user can select from when entering information in the Members screen. These valid values are often codes that represent something larger or have a special meaning in your Temple. For example, if you use this field for “Financial Code”, then you may say that if there is a “0” in this field for a particular member that the member pays “Regular Dues”. If the member has a “1” in this field, then they would pay “Single Dues”. If the member has a “2” in this field, then they pay “Senior Dues”. Then you would use this field to build queries in order to do a global assessment of all “Regular dues”, “Single Dues”, and “Senior Dues”. There are 36 possible codes for this field.

“**13.**” - This is a two character field. This field, often used for “Occupation”, is a special field in the TempleTracker System. This field has a “Drop-Down” associated with it, meaning you can create a list of valid values that the user can select from when entering information in the Members screen. These valid values are often codes that represent something larger or have a special meaning in your Temple. For example, if you use this field for “Occupation”, then you may say that if there is a “0” in this field for a particular member that the member’s occupation is “Accountant”, if the member has a “1” in this field, then their occupation is “Banker”, and so on. Since the codes themselves can be 2 characters long, you can have more codes. It is possible to have 1296 different codes for this field.

“**14.**” - The maximum length of this field is 10 characters long.

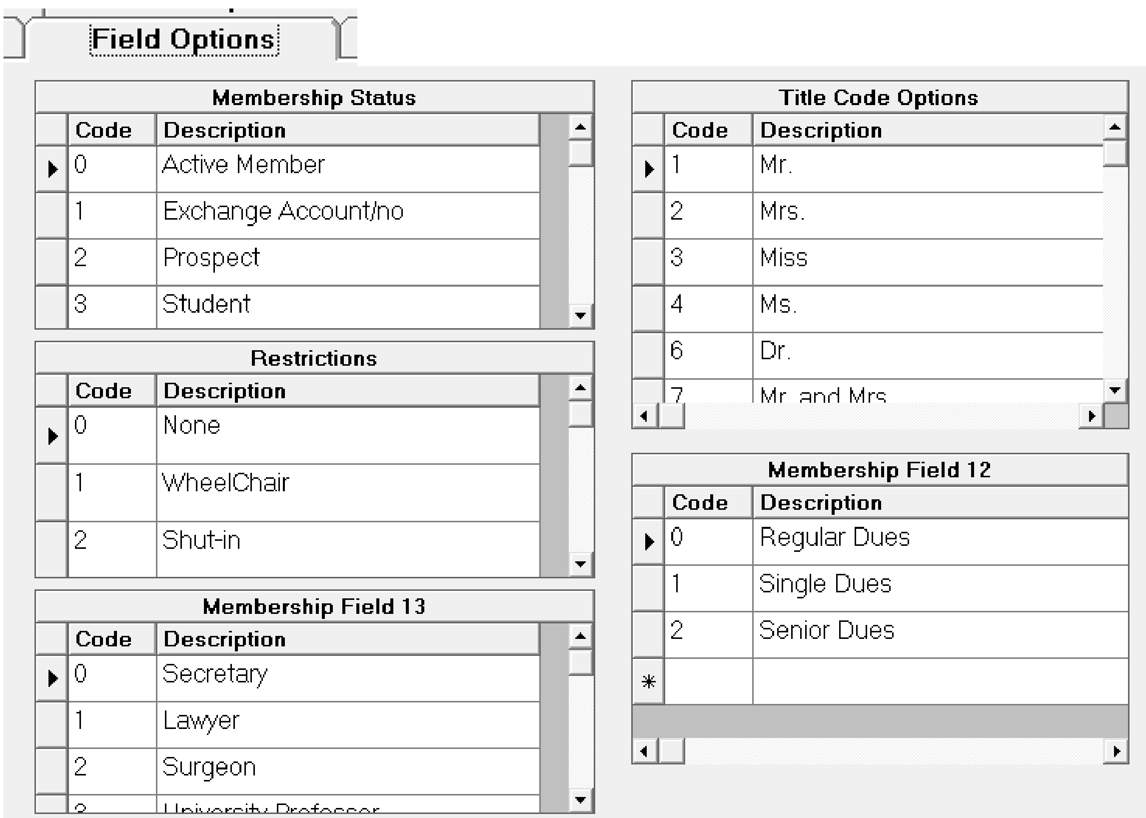
“**15.**”, “**16.**”, and “**17.**” – These three fields have a maximum length of 4 characters.

“**18.**” And “**19.**” – These two fields have a maximum length of 20 characters.

“**20.**” - This is a one character field. This field, often used for “Restrictions”, is a special field in the TempleTracker System. Like fields “**12.**” And “**13.**”, this field has a “Drop-Down” associated with it, meaning you can create a list of valid values that the user can select from when entering information in the Members screen. These valid values are often codes that represent something larger or have a special meaning in your Temple. For example, if you use this field for “Restrictions”, then you may say that if there is a “0” in this field for a particular member that the member has no restrictions (“None”), if the member has a "1" in this field, then they're "Visually Impaired", if the member has a "2" in this field, then they're "Hearing Impaired", and so on.

Once you have decided which fields you want to use to store which data, enter your field titles on this screen. They will then appear on the membership screen when you enter data. Let's enter Row # and Seat # in the first two fields so that we can keep up with each members' High Holiday Seats. These are five characters in length and so will easily accommodate the numbers. Continue to enter descriptions shown on Screen 8 or enter your own descriptions.

Now let's see how we set up the options for the drop-down menus for items **12**,**13**, and **20**. From the Member Titles Screen, click on the tab to the right labeled "Fld. Options." The following screen will appear:



As you can see, on the first page of this section, options for several fields are displayed. You can add a value by scrolling to the bottom and filling in both the number and description in the blank line with the * at the left.

Membership Status	
Code	Description
4	changed
5	Deceased This Year

You can delete a value by highlighting it and clicking the [Del] key. And, edit by typing over the description.

Participation Titles

There are 60 fields for participation, such as board member, or youth committee, etc. These are one character fields, so one can put in M for member, P for president, etc. and then select a report with all members who do not have a blank in that field.

You can enter such titles as "Brotherhood," "Sisterhood," or "Adult Education" to keep track of membership information. These fields can hold one character codes; for example, for "Brotherhood" your codes may be:

R: for Regular Member
B: for Board Member
P: for President
Z: for Prospective Member

Or, you may want to use numbers to represent these codes. Then, when you are building reports or creating merge files, you can select which members to use based on their codes in this field. Enter possible Participation Field Titles on the screen below:

Participation Titles

Field #	Title
1	Board
2	Youth Committee
3	Temple Officer
4	
5	
6	

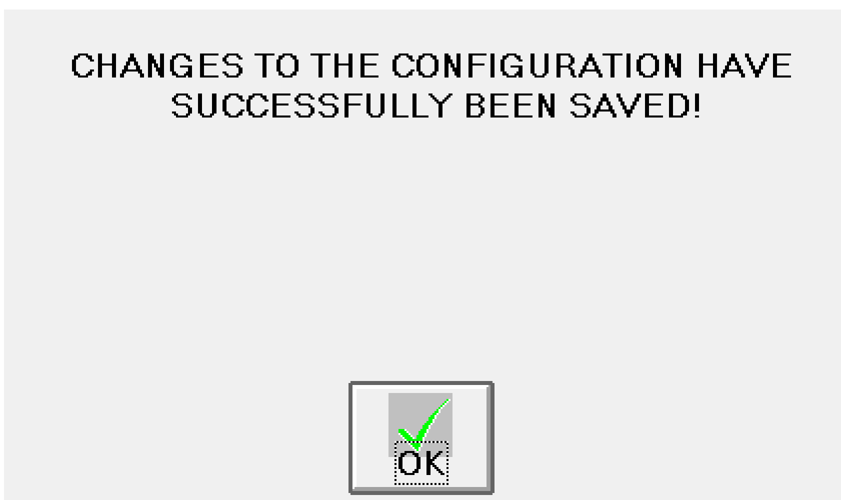
Checklist Titles:

Checklist

Field #	Title
1	Computer Tec
2	Electrical
3	Piano
4	Brotherhood
5	Sisterhood
6	

The Checklist Titles are used like Participation Titles but they can only hold values of yes or no (checked or unchecked). You would use these fields if you do not need special codes like the ones we used for Brotherhood Membership, but just need to know whether or not someone is a member of a particular group.

At this point, let's save the changes we have made to the configuration screen by pressing the [SAVE] button on the lower right. The following message will appear:

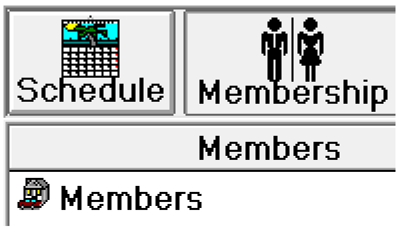


Yahrzeit Titles

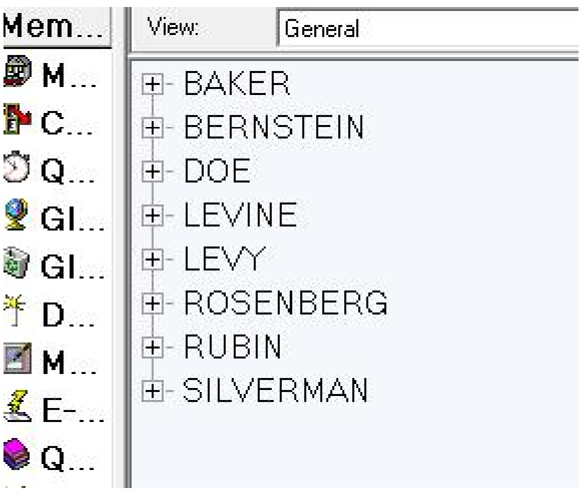
There are 6 user defined fields on the Yahrzeit screen.

Add a Member

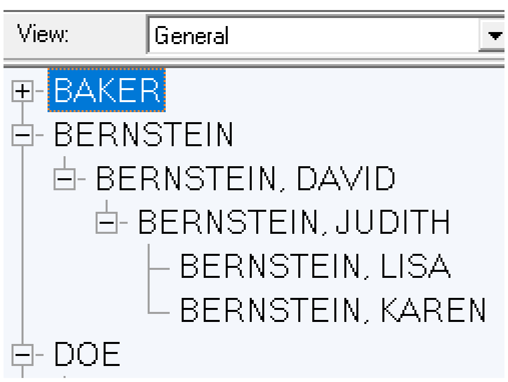
From the main menu, click Membership and then click Members.



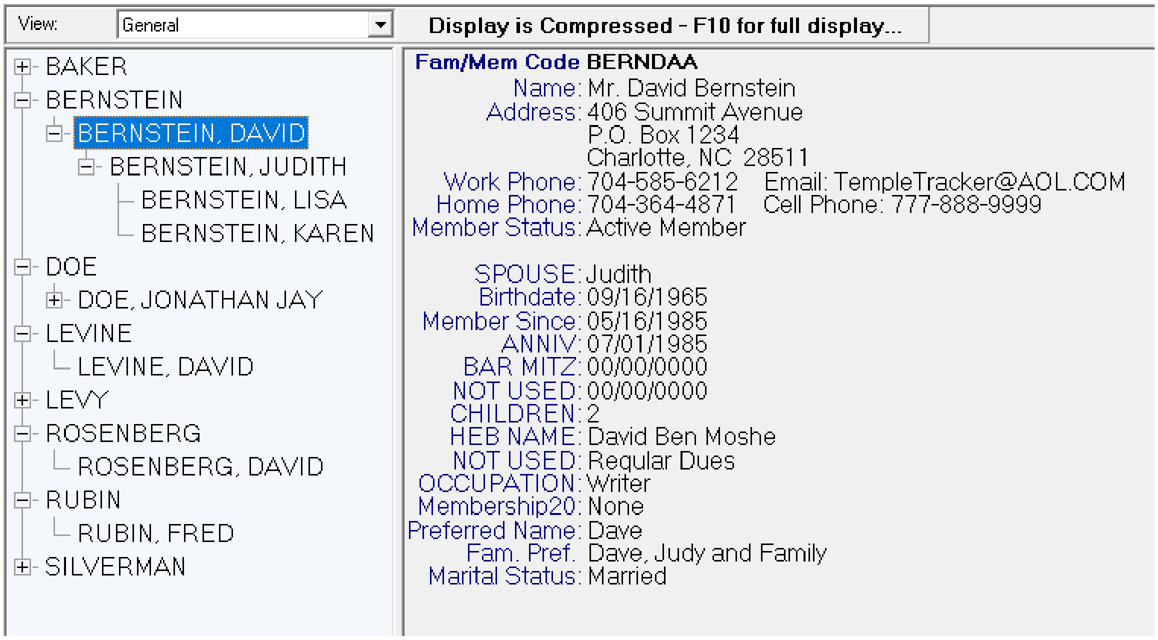
A list of members last names will appear.



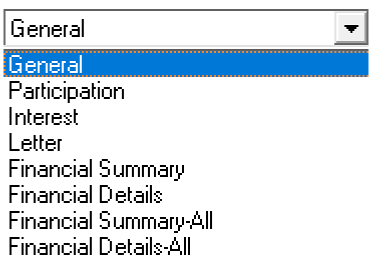
Click the + sign next to a last name to open, and all of the heads of households with that last name appear. Again, click the + to open that family.



Click a name and general info about that member appears. This is display only, you have to double click the name to get to a screen that allows you to edit the information.



The view can be changed to the following information categories.



Click the [Add] button on the bottom to add a member

Family Number: The cursor will be sitting on Family Number. For each member, use a Family Number that is the first four letters of the last name and the first two letters of the head of household's first name. For example, David Bernstein's Family Number would be BERNDA. If there were two David Bernsteins in your congregation who were both heads of households, you could change BERNDA to BERND1 and enter the new David Bernstein as BERND2. Type in BERNDA here and press [ENTER] to move the cursor to the next field.

Member Number: The cursor will now be sitting on the Member Number Field. Each family member is given a code which represents whether they are head of household, spouse, or child. Head of households are given Member Codes of "A." "B" indicates a spouse - "C," "D," and so on indicates children. Type in an "A" here and press [ENTER] to move to the next field.

Member Name: When typing in the member's name, always insert a slash "/" before the last name. This allows the system to create an alphabetical list through which to browse. Type David R./Bernstein here and press [ENTER] to move on.

Address: Two lines are available for the Primary Address. On the first line, type in 4400 River Ridge Drive and press [ENTER]. Press [ENTER] again to skip the next line or enter an apartment number here. Press [ENTER] to move to the City field. Type in "Charlotte" "NC" "28211" pressing [ENTER] after each field.

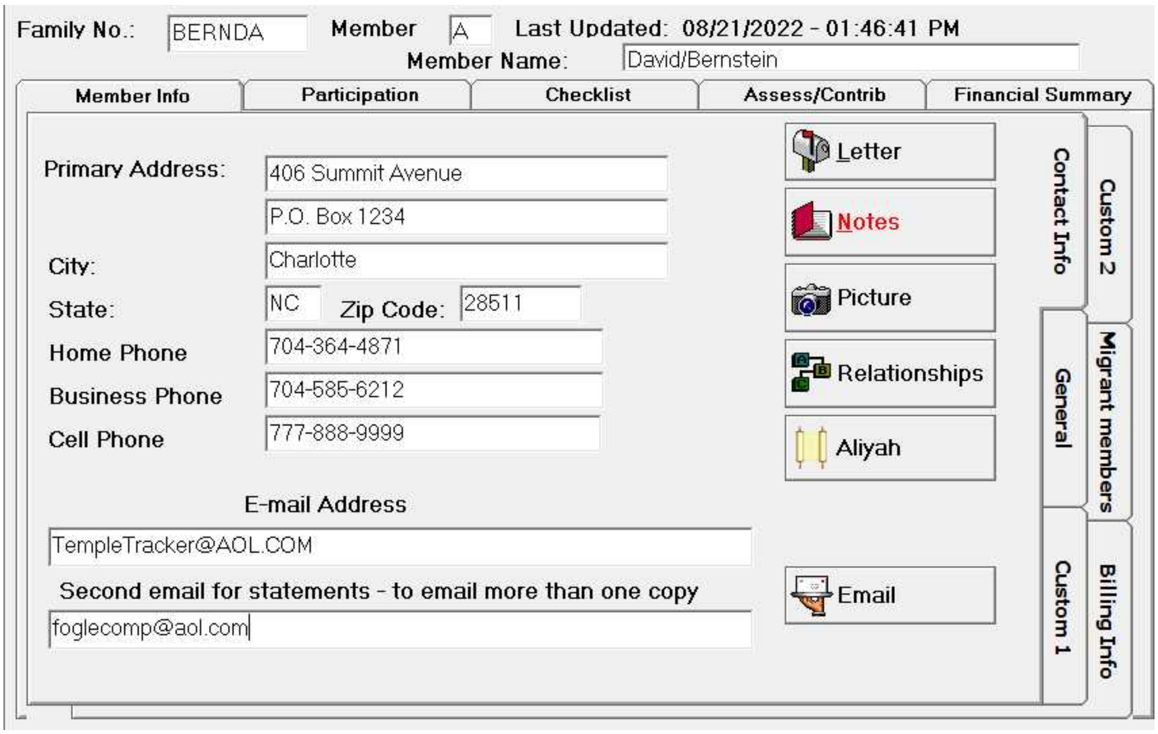
Home Phone #: Enter 704-678-0297 for the phone number and press [ENTER]. When entering phone numbers, use dashes to separate.

Business Phone #: Type in a business phone using the same format and press [ENTER].

E-mail and Second e-mail:

This is required if the member is getting his/her statements emailed. The second address is for the case where statements are going to two addresses.

This shows the [Member Info] tab at the top and the [contact info] tab on the right.



Most of the fields are self explanatory. Click each of the tabs on the right to examine the info being maintained.

Membership Status: To view the default values of this field, click on the arrow to the right of the blank box to bring up a list of choices. You're screen will look like the one below:

Select Active Member by moving the mouse over your selection to highlight it. Click the mouse to insert your selection into the field.

Repeat above instructions for Title Code and Family Title Code. The Title Code is the title for the individual you are entering. The Family Title Code is the title code you would use when addressing the family. For example, in a merge document you might type

"Dear [Family Title Code] [Last Name]:

to print on the letter "Dear Mr. and Mrs. Bernstein:".

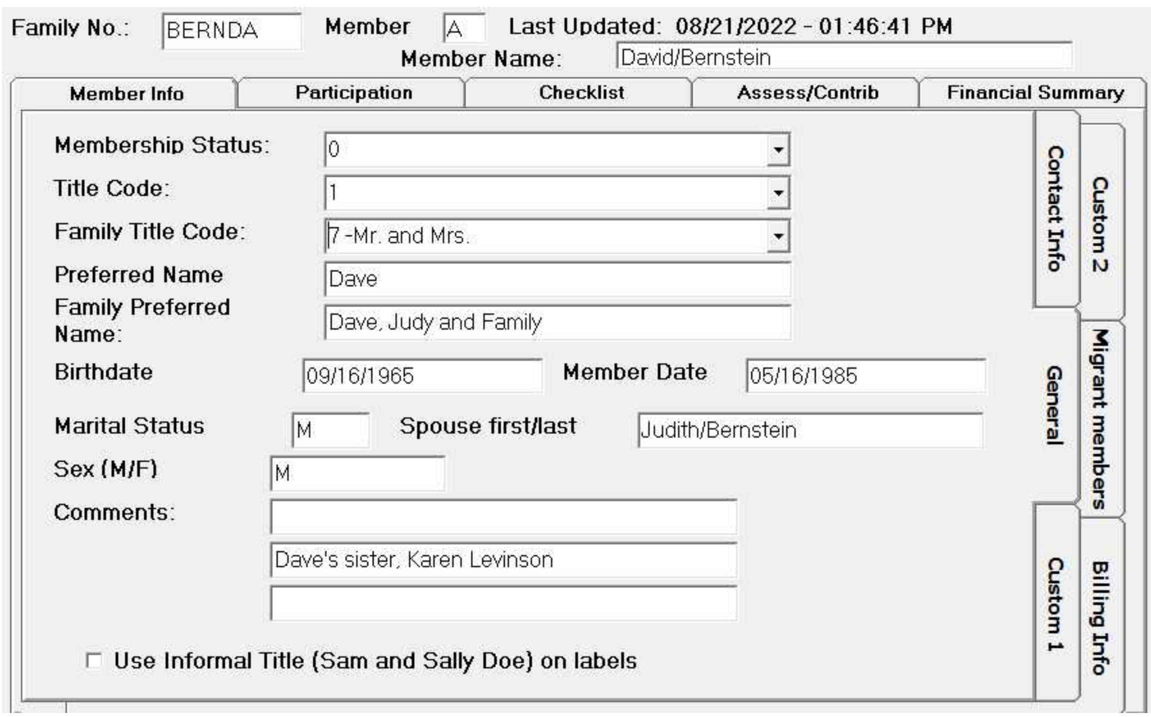
Or you might type "Dear [Title Code] [First Name] [Last Name]:

to print on your letter "Dear Mr. David Bernstein:".

Preferred Name: This field is the preferred name of the individual. Perhaps you would want to address letters to this individual "Dear Dave:" instead of using the more formal Mr. Bernstein. Enter "Dave" here and press [ENTER] to move to the next field.

Family Preferred Name: This is the way you want the family to be addressed: "Mr. and Mrs. Bernstein" or "Dave and Sarah." Enter "Dave and Sarah" and press [ENTER

Use the dropdowns on those fields that have them on the right side of the field.



You're screen may not look exactly like the one above because as you can see, the first ten Membership Titles we established in the Configuration screen are now displayed on our Membership screen so that we can enter the data.

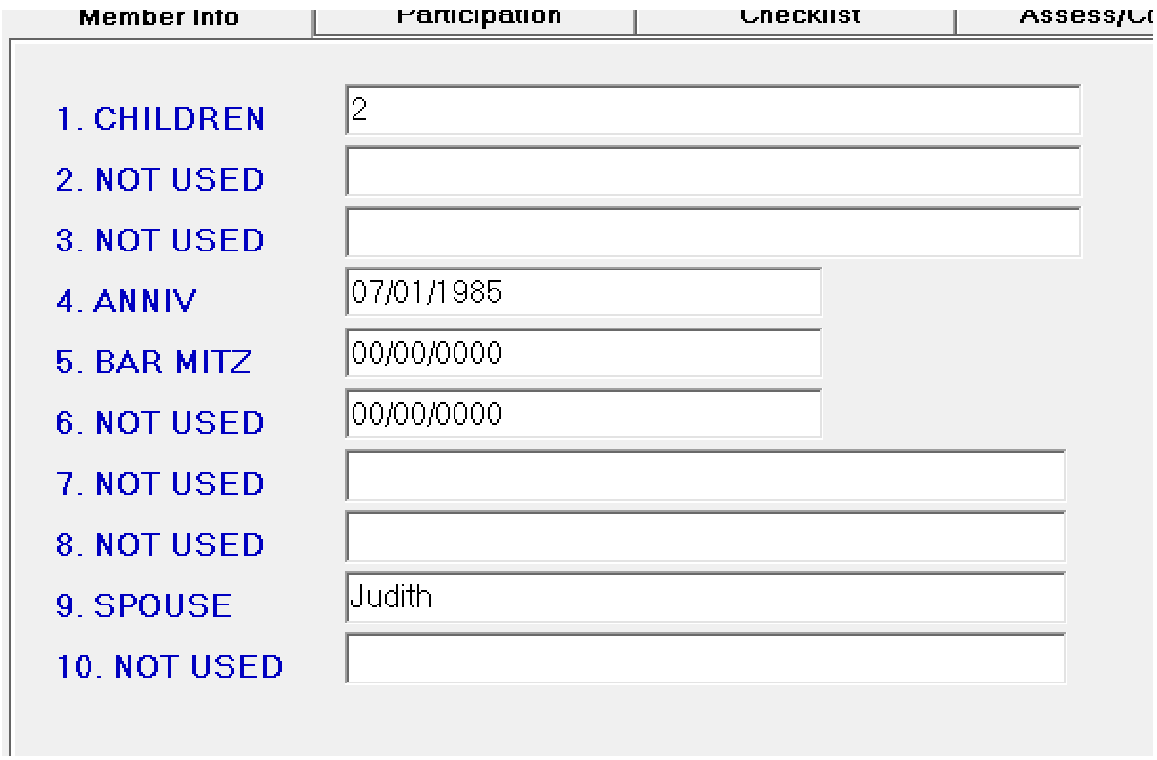
Birthdate: Enter a Birthdate in MM/DD/YYYY format. (If you configured your system to read dates in Canadian formats, enter the date in YYYY/MM/DD format.)

Member Date: Enter the date this person became a member in MM/DD/YYYY format. (If you configured your system to read dates in Canadian formats, enter the date in YYYY/MM/DD format.)

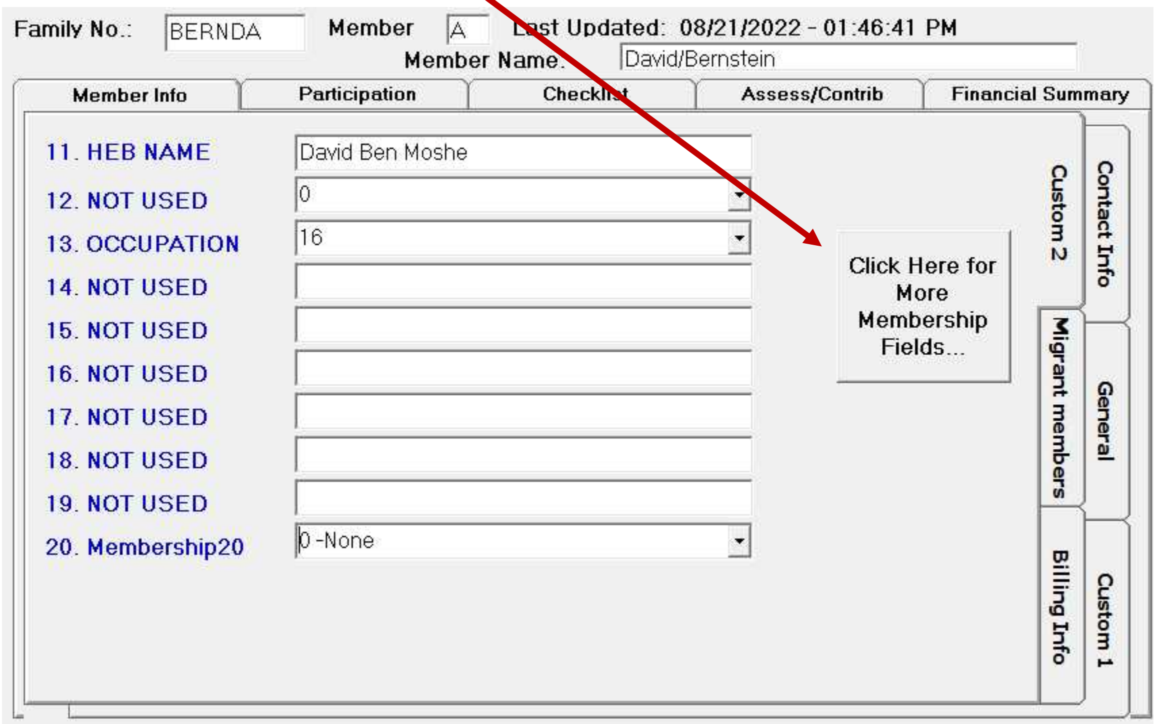
Marital Status: Enter an **M** for Married, **S** for Single, **D** for Divorced or **W** for Widowed here.

Sex: Enter an **F** for Female or an **M** for Male.

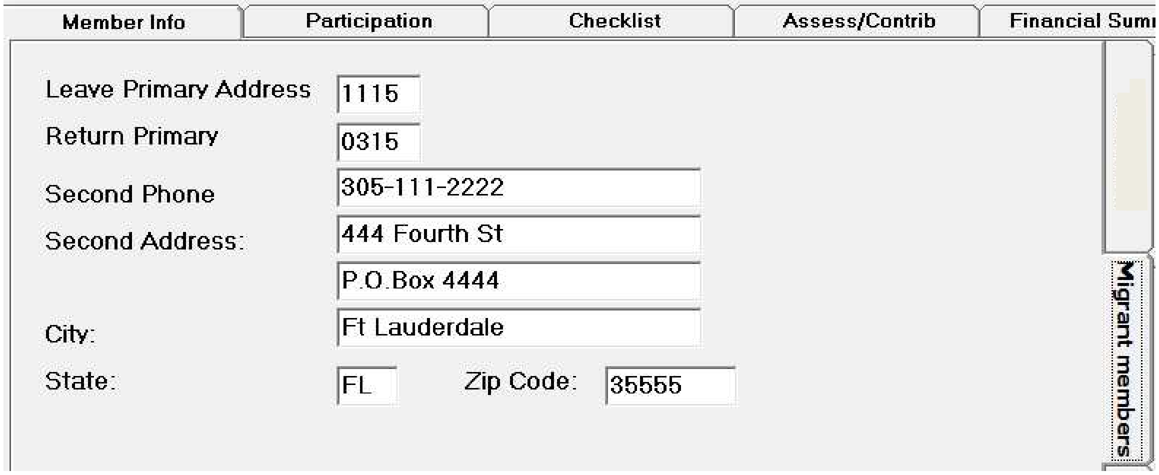
Entering data in your user-defined fields works the same way. This is the [Custom 1] screen. Your screen may have Membership Titles 11-20 displayed as follows:



The [Custom 2] screen contains more data and presents the path to fields 21-40 with the button for [click here for more membership fields]

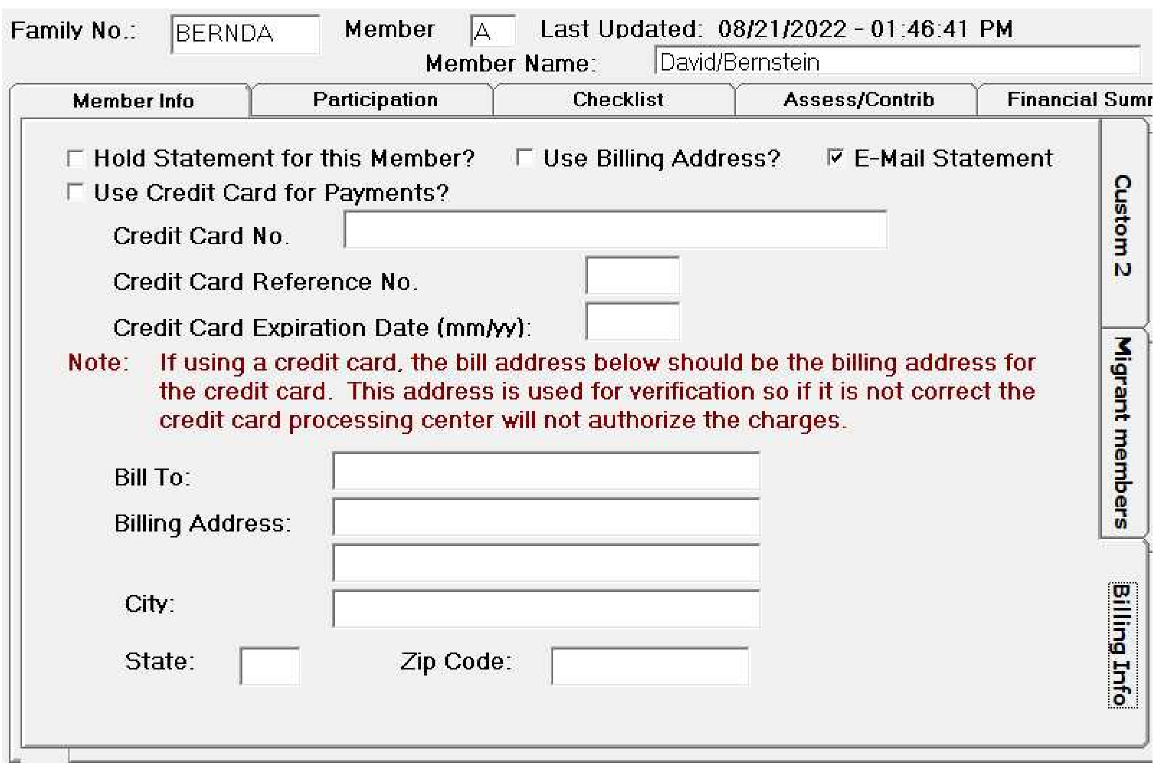


Migrant Members:



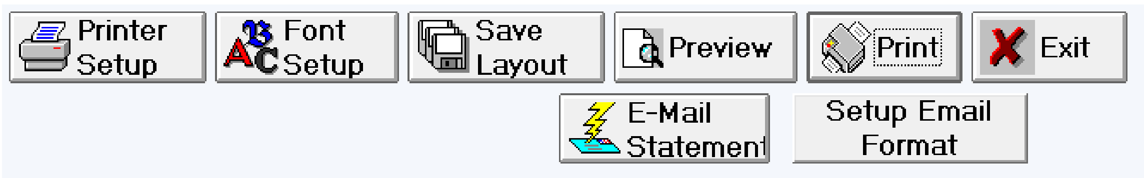
This member leaves his primary address on November 15 each year and returns on March 15. Mailing labels printed by TempleTracker will use the address in effect at the time the label is printed.

Billing Info:



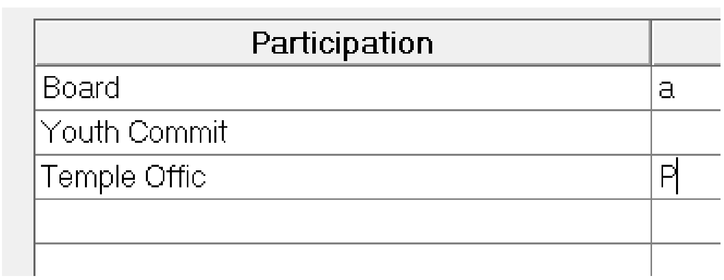
You can hold certain statements, perhaps for staff members, and you can use a billing address (such as a business address or P.O. Box) for certain members. If E-mail is checked, then no statement will print when statements are printed.

For reference, these buttons are on the bottom of the statements module. [Print] selects members not flagged for e-mail, and E-mail sends statements for those flagged for email.



Enter Participation Information:

Now we are ready to enter data in Mr. Bernstein's Participation and Checklist fields which we have previously configured. Click on the lower right hand corner of the notebook to turn the page or click on the tab entitled "Participation" to arrive at the screen below:



This screen will now display the Participation Titles you set up previously. Now we can enter data for those fields which Mr. Bernstein is involved.

Enter Checklist Information:

Checklist

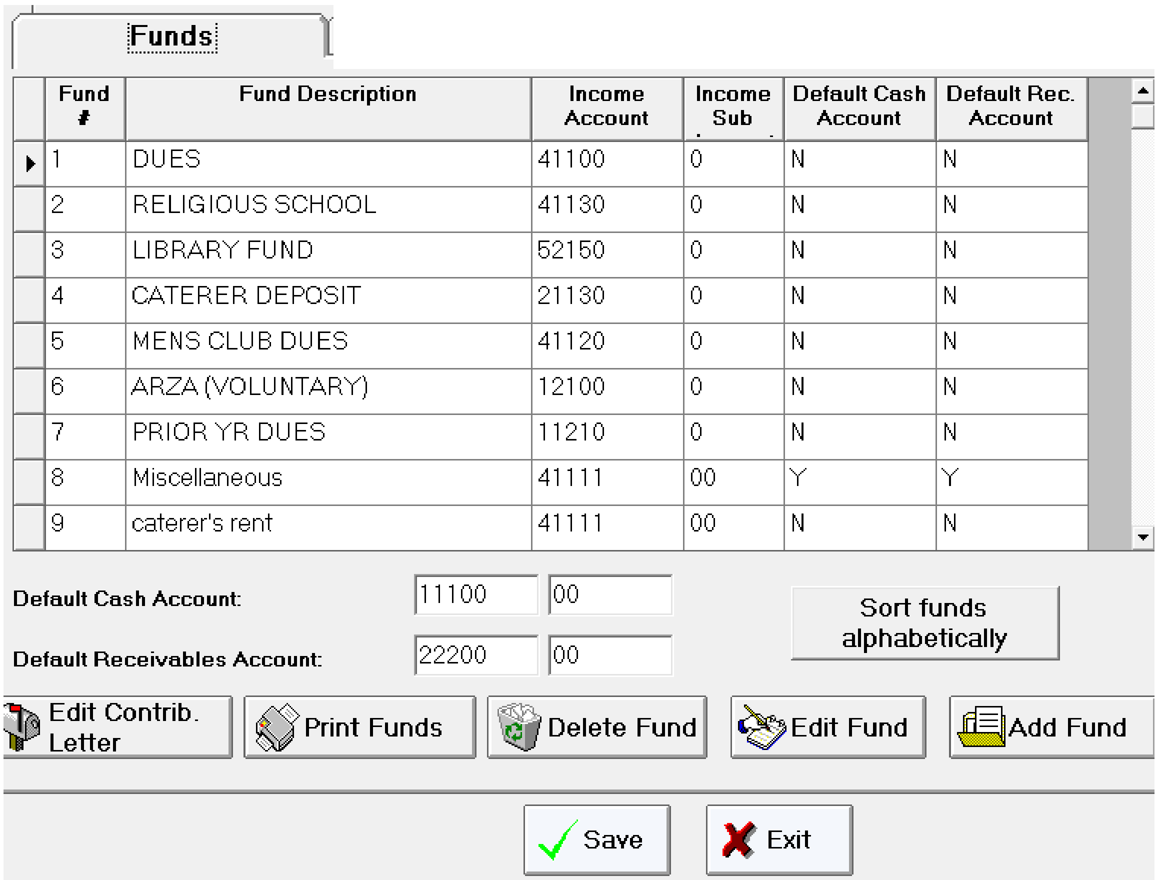
Field #	Title
1	Computer Tec
2	Electrical
3	Piano
4	Brotherhood
5	Sisterhood
6	

Perhaps Mr. Bernstein could help the staff with computer problems.

Setting up Funds

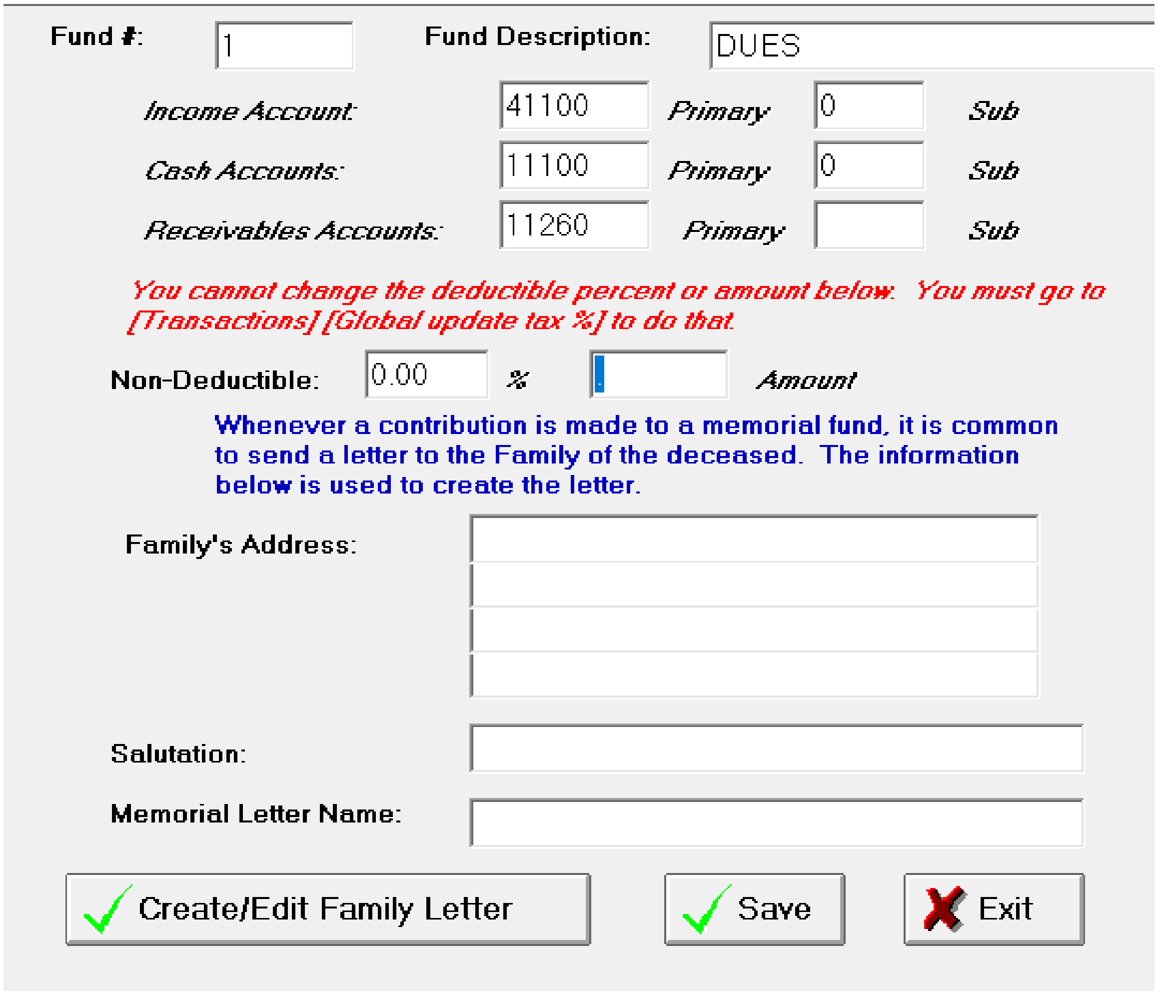
Now we will return to the configuration screen to set up funds. From the Main Menu, select System then Options, then Funds. This shows funds already set up. The system allows 999 different funds.

Note that the buttons allow you to add a new fund, edit and existing fund, or print a list of funds to be used by the person receiving checks. The fund display can be sorted by fund number or alphabetically by fund description.



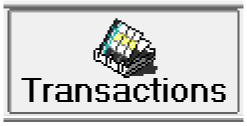
Fund #	Fund Description	Income Account	Income Sub	Default Cash Account	Default Rec. Account
1	DUES	41100	0	N	N
2	RELIGIOUS SCHOOL	41130	0	N	N
3	LIBRARY FUND	52150	0	N	N
4	CATERER DEPOSIT	21130	0	N	N
5	MENS CLUB DUES	41120	0	N	N
6	ARZA (VOLUNTARY)	12100	0	N	N
7	PRIOR YR DUES	11210	0	N	N
8	Miscellaneous	41111	00	Y	Y
9	caterer's rent	41111	00	N	N

If you highlight a fund and click [Edit], this screen appears. Note that “Non-Deductible” is for taxes, so dues are not taxable, but payment for a dinner is probably only partially deductible. If this is a memorial to someone, the name and address info is for the letter to the family of the honoree notifying them of the contribution.

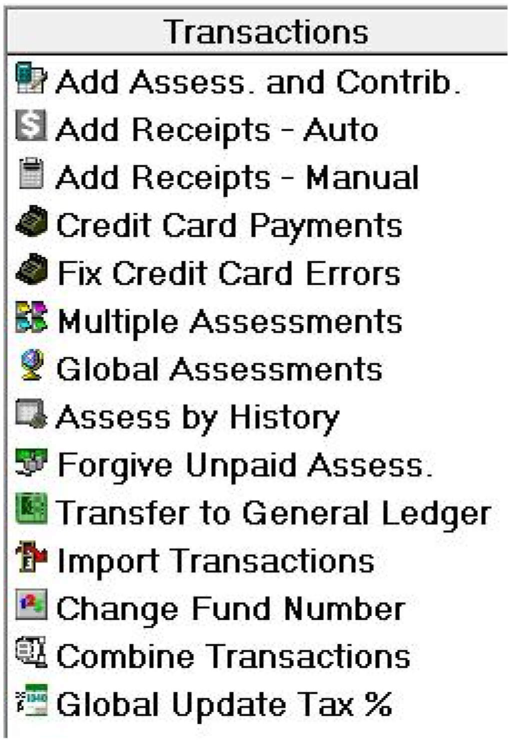


Record an Assessment

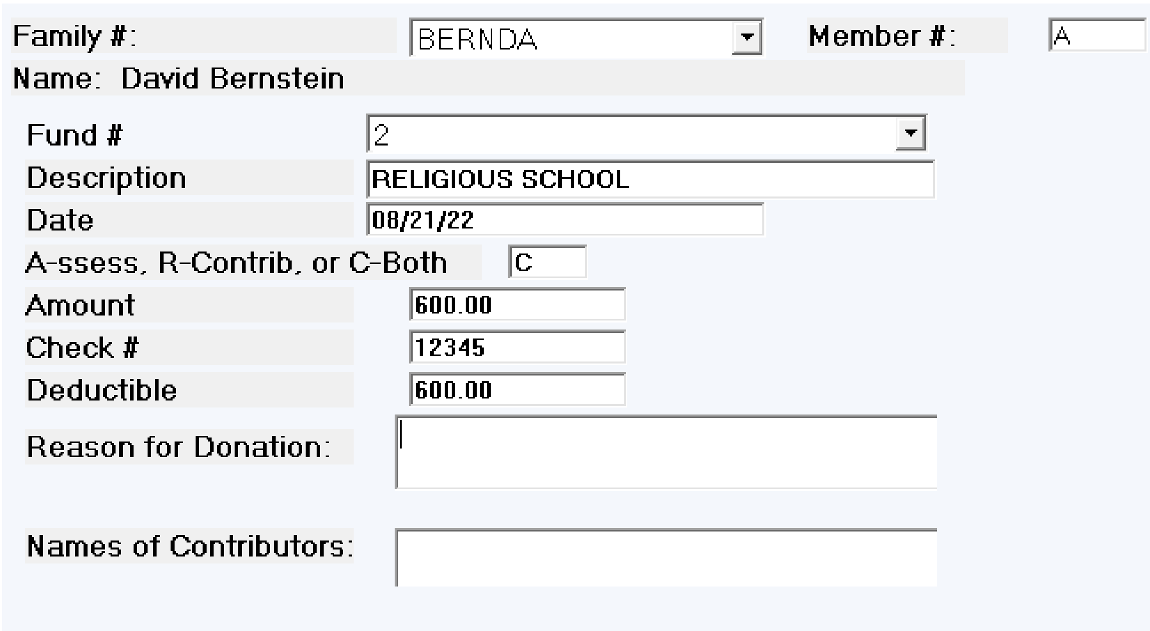
Now that we have set up funds, we can enter assessments and receipts for David Bernstein. Click the



Button, and select [Add Assess and Contrib]



This shows a payment for religious school which was not assessed previously, so it is entered with the type code of C. Two transactions will be created, an assessment and receipt. This fund is set up as 0% non-deductible, so the entire amount is tax deductible. The program calculates the deductible amount.



Family #:
If David Bernstein's family and member code did not appear in the first boxes, you may locate his name by clicking on the down arrow to the right of the Family # box to select from your list of members. Press [ENTER] to move to the next field.

Member #:
Type "A" in the Member # field to represent a head of household and press [ENTER].

Fund #:
To select from your list of previously created funds, click on the drop down arrow to the right of the Fund # box. Highlight number 1, Building Fund, so that it appears in the box. Press [ENTER] to move to the next field.

Description:
The description should fill in automatically. Press [ENTER] to move to the next field.

Date:
Press [ENTER] to accept today's date as the transaction date. You can type a different date here if you wish. Press [ENTER] to move to the next field.

A-ssess, R-Contrib, or C-Both:

In this box, we will type in a “C” for both an assessment and a contribution at the same time. We would do this if we had received a check from David Bernstein for a fund for which he had not previously been assessed. Press [ENTER] to continue.

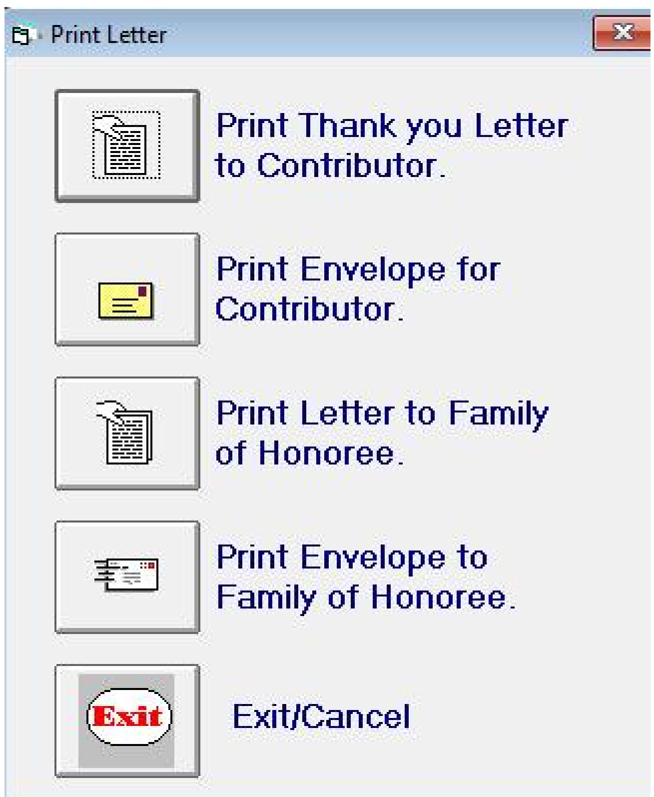
Amount:
Enter an amount of $450.00 by typing “450” and press [ENTER].

Check #:
Enter a check number for reference purposes.

Deductible:
The system will compute the deductible amount based on whether you set a certain percentage or amount of the payment as a non-deductible amount in the Options-Funds Screen. We left 0% non-deductible there and will accept the default value of 100% deductible here. If you needed to overwrite this value at this point, you could type a new value over the default value.

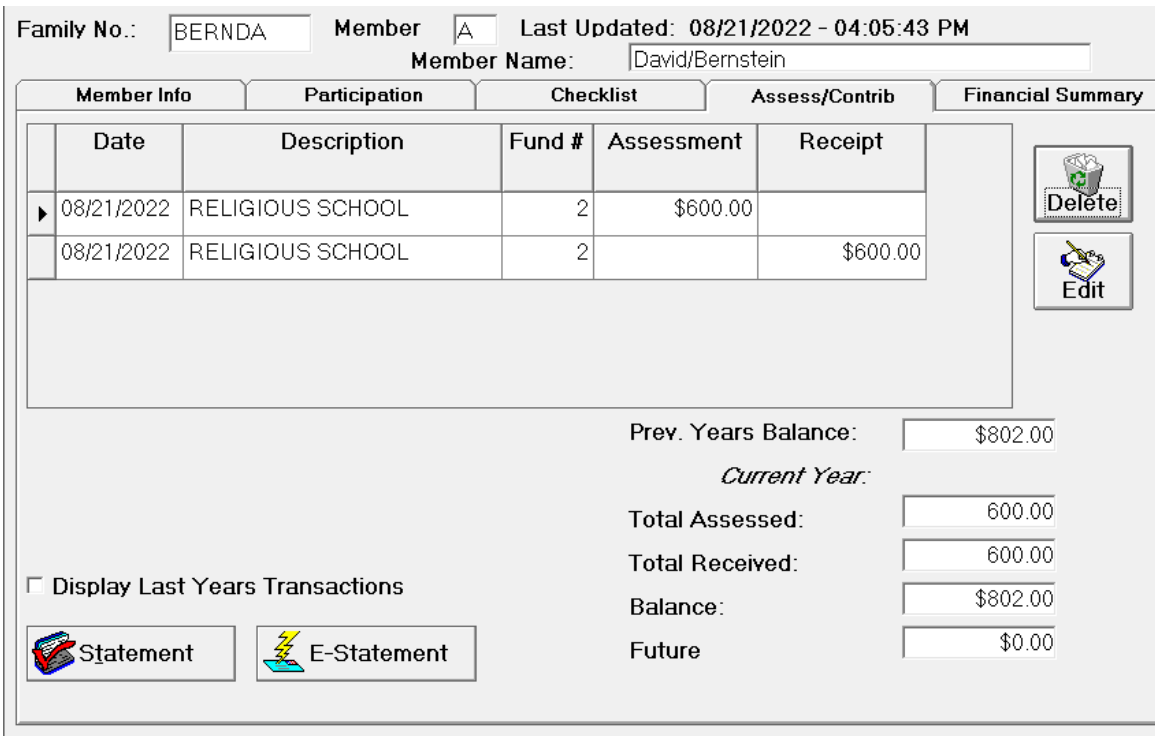
We do not have to complete the next two fields because this donation is not to a memorial fund. Your screen should look as follows:

Before saving this transaction, press the [LETTER] button to see the following screen:



You can print a letter of thanks to David Bernstein by clicking the picture next to **Print Thank-you Letter to Contributor**.

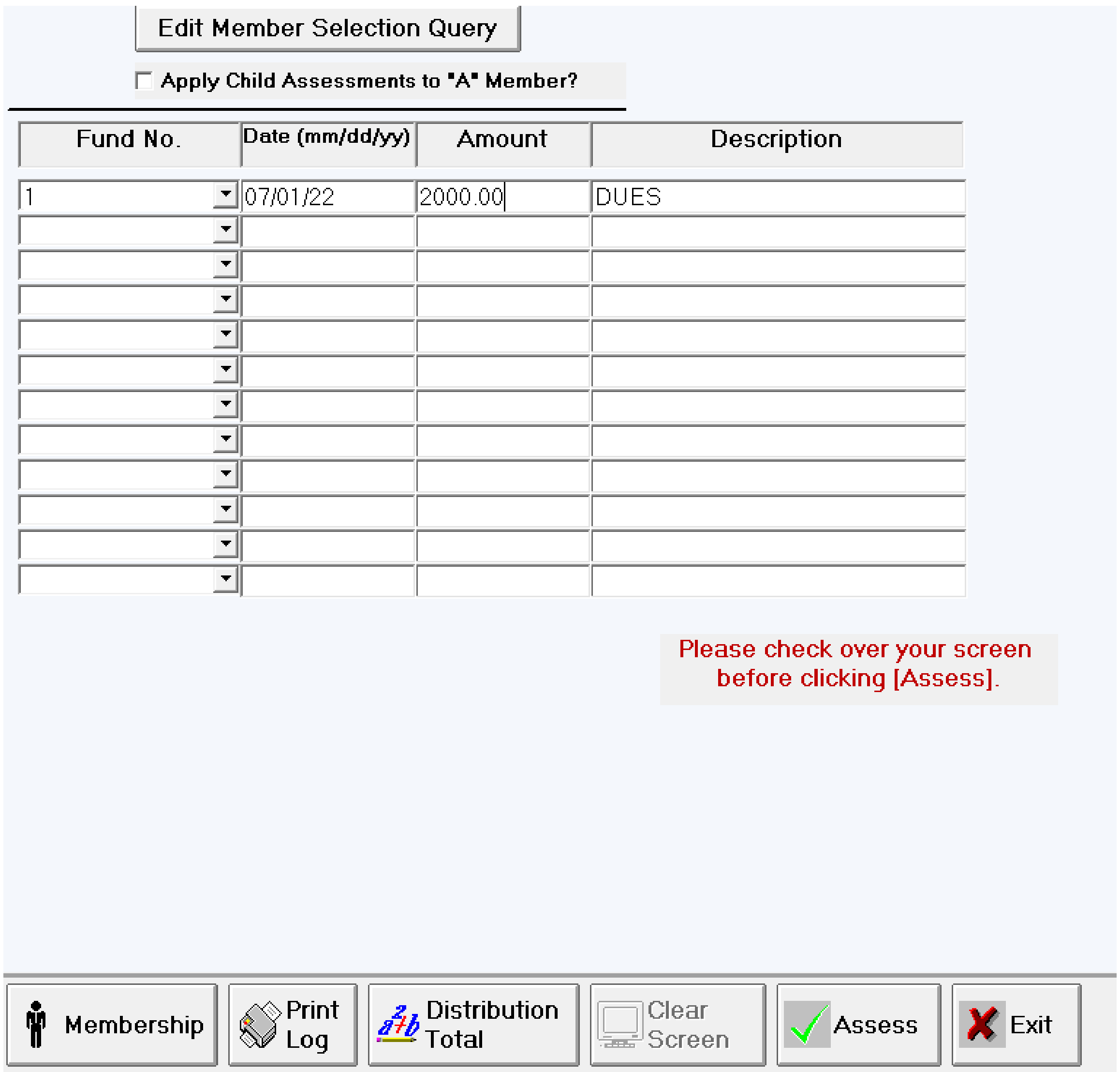
Press [SAVE] to save the transactions. A message box will appear to let you know the transaction has been saved. Click OK and press Exit to return to the Main Menu. Now if you go to the Membership menu and click Browse/Update Member and select David Bernstein by double clicking on his name, you can see his transactions by selecting the Assess/Contrib tab to display the screen below:



As you can see, by entering a "C" for the type of transaction, both an assessment and contribution, two transactions were entered for this member.

Record a Global Assessment

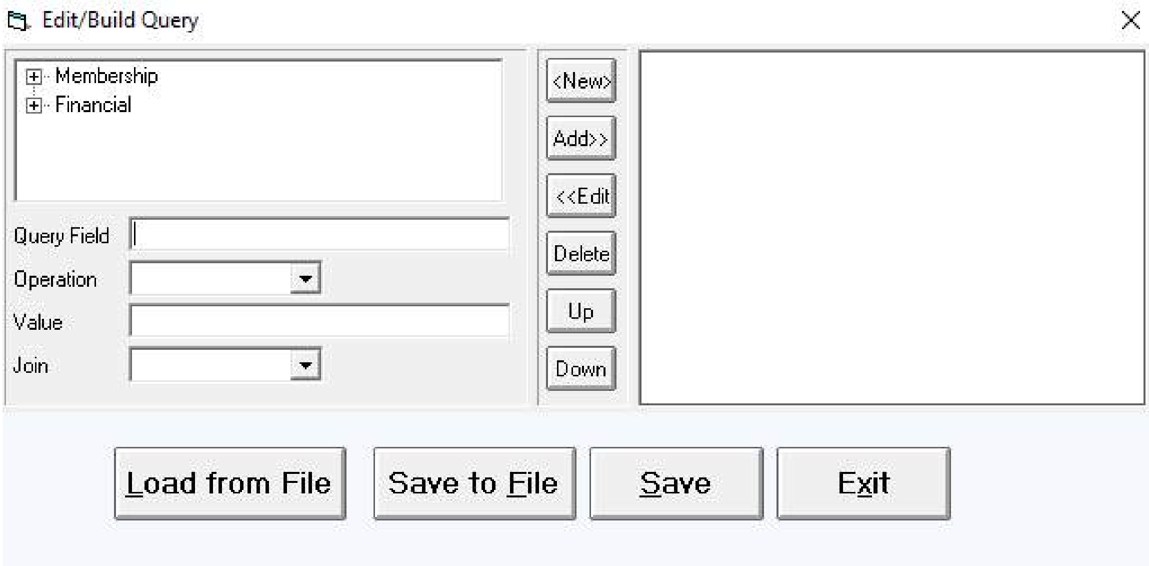
Now let's enter a global assessment for all members with the Member Code of "A". In our example, this procedure will assess David Bernstein but not Sarah Bernstein, who has a Member Code of "B". The following procedure would also assess any other heads of households in our system. From the Main Menu, select the Transactions Menu, then select Global Assessments. Fill in like this and click Assess:



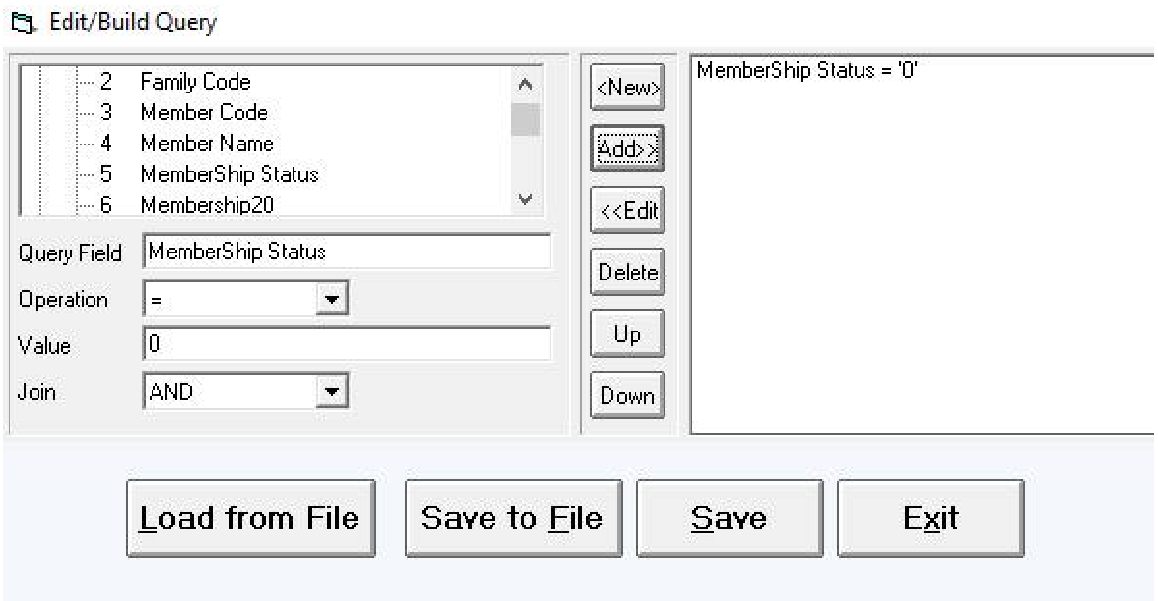
The above screen bills all heads of household $2000 for dues. If you want to only bill heads of household with membership status = 0 , regular members, you have to use [edit member selection query]

If you make a mistake, you can globally delete a group of transactions with the Change Fund number module, and delete all transactions for a date range and fund number by changing the fund number to minus one.

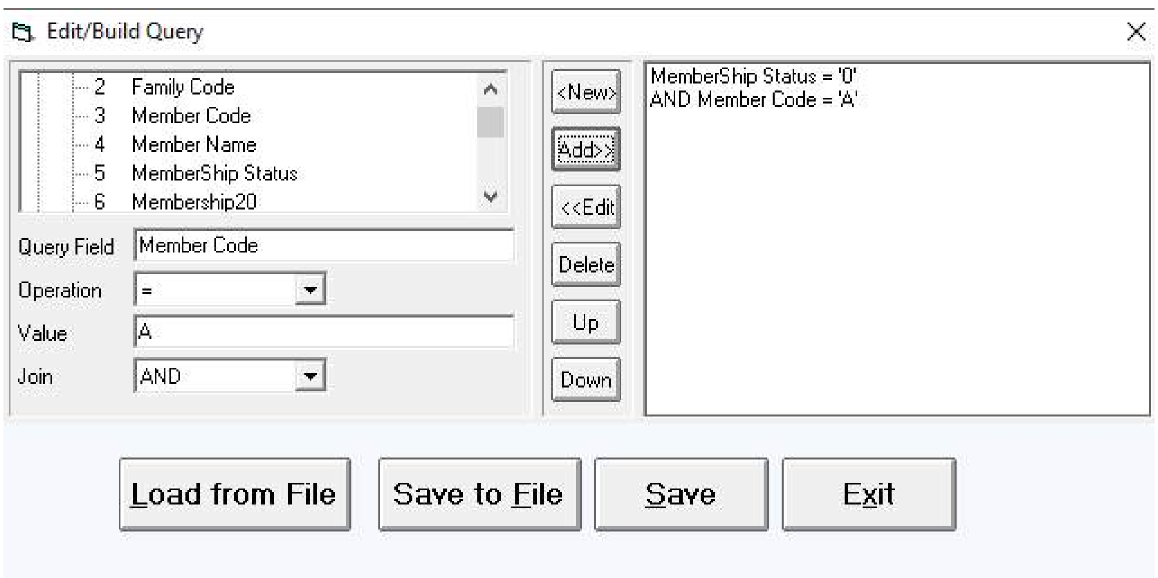
Edit Member Selection Query:
Press [EDIT MEMBER SELECTION QUERY] to select the members we want to assess. The following screen will appear:



Since we want to limit the members to be assessed based on one of their Membership Fields, Member status ***click on the plus sign*** to the left of the Membership folder to open it. Each option available to be used as selection criteria will be displayed in alphabetical order. Move the arrow to Member status and click the mouse to make "Member status" automatically appear in the Query Field box. Move the cursor to the Operation box. Click on the arrow to the right of the box to view the choices. Point the arrow to "=" and click the mouse. Press [ENTER] to move the cursor to the Value Field. Here you will enter what you want your field to be for each member you will assess. In this case, we want the Member status= 0 for active members so type "0" in this box and press [ENTER]. Next select the Join, in this case it will be AND because we only have one criterion members must meet in order to be assessed. **Once all of the boxes are filled, click [ADD] to display the query to the display screen on the right.**



Now we use the same procedure to select only Member Code = A, and now the screen looks like this:



Once the query is displayed, you may save the query by clicking [SAVE] and then press [EXIT] to leave the Edit Member Selection Query screen. If the query was not displayed on the right-hand side of the screen, it was not saved. At this point, you will return to the Global Assessment Screen.

Fund Number:
Move the cursor to the Fund Number field and type a “2” in the box for Member Dues or you can select this fund from the drop down menu to the right of this field.

Date:
Enter the effective date for this transaction.

Amount:
Enter the amount of the assessment. You can enter just the number without decimal places if it is a whole dollar amount. You do not need to enter the $ sign.

Description:
This field should be automatically filled in for you.

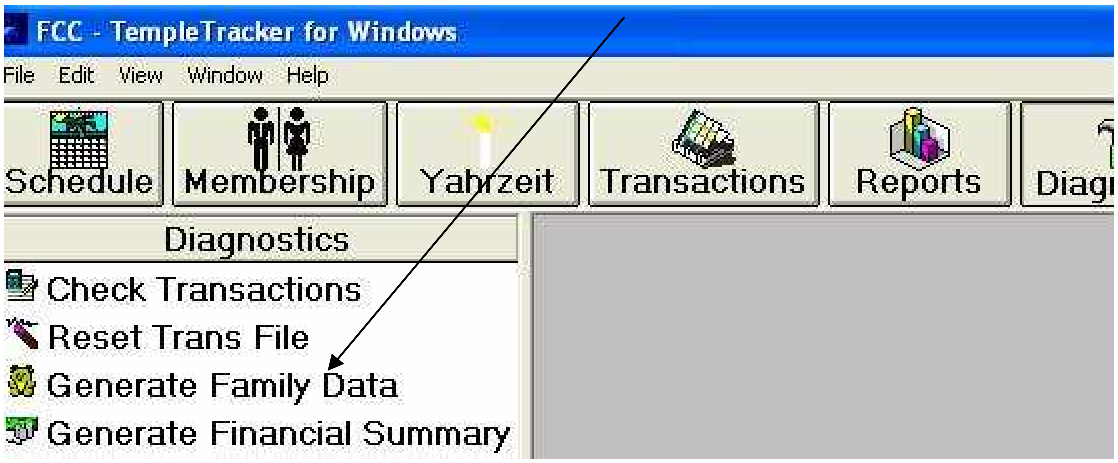
At this point, if you click [ASSESS], everyone in your congregation with a Member status = 0 will be assessed for the amount entered on the screen. When you are assessing members, you can use the Edit Query Screen to assess only those in Sisterhood, only those with a Financial Code of 0 (which you may have used to represent Family Dues), only those with a child in Religious School, or any other option available from your user-defined fields. This way you can assess different members different amounts and only have to go through the process once for each different amount to be assessed.

Note that the [Assess by History] just bills everyone the same thing they were billed last year, or it can increase it by a certain percentage or amount.

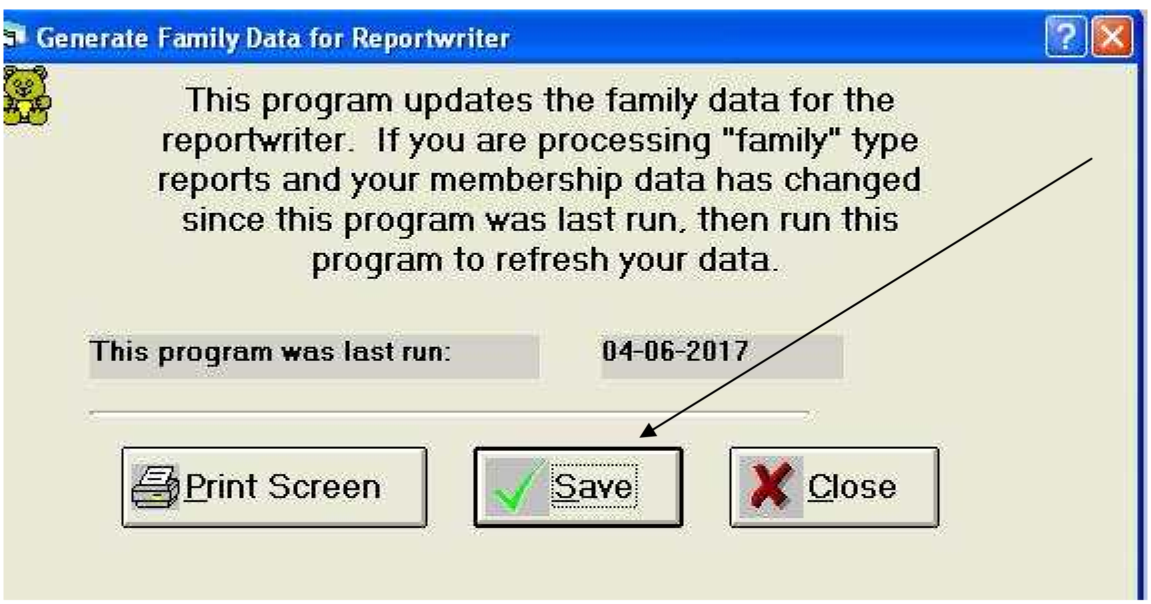
Creating Your Own Report

Now we will examine creating our own customized report. One way to illustrate this is to create a specific report, to wit: Family Report with Children's Birthdates.

Go to [Diagnostics] ➔ [Generate Family Data]

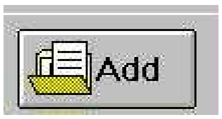


And click [save]. This will take a few minute, and you have to refresh it if you run this report again a month from now.

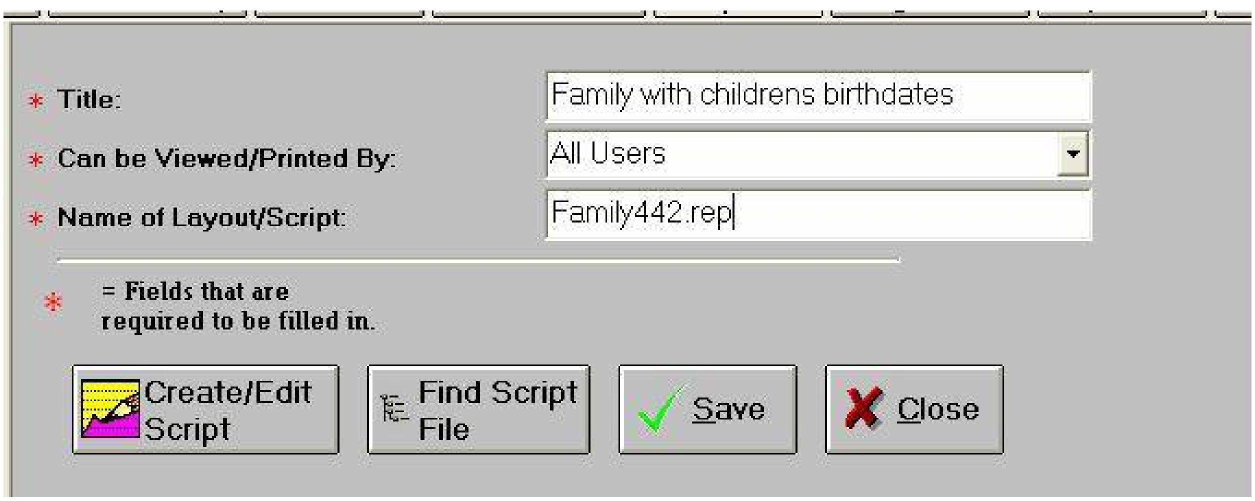


Next go to [Reports] ➔ [Custom Reports]

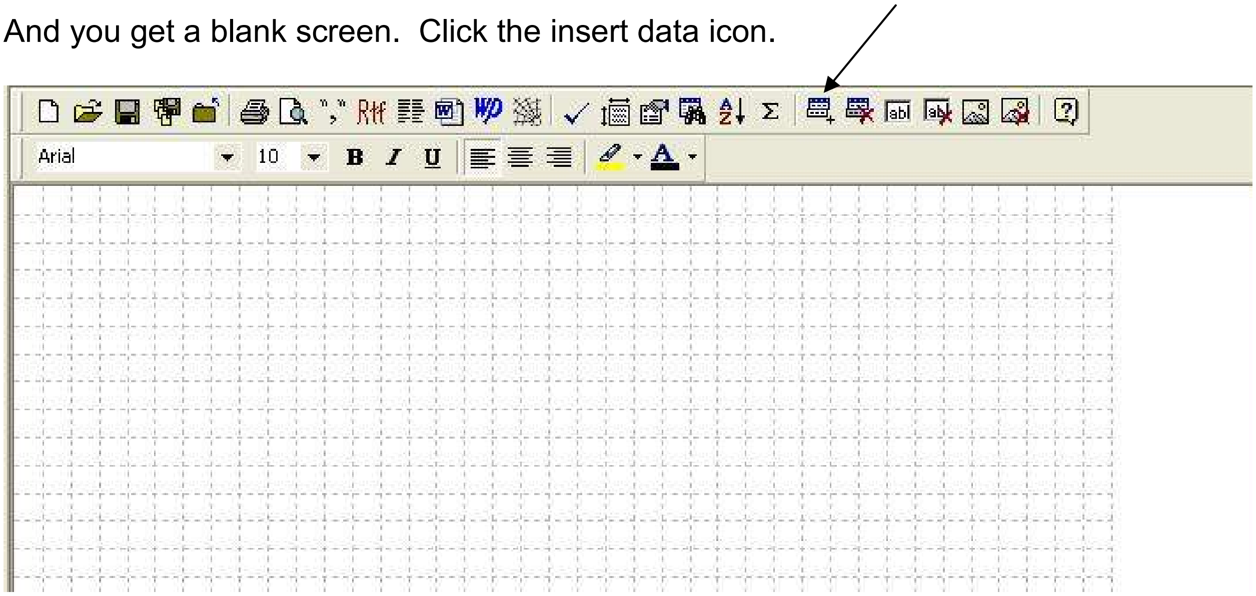
And click the Add button on the bottom



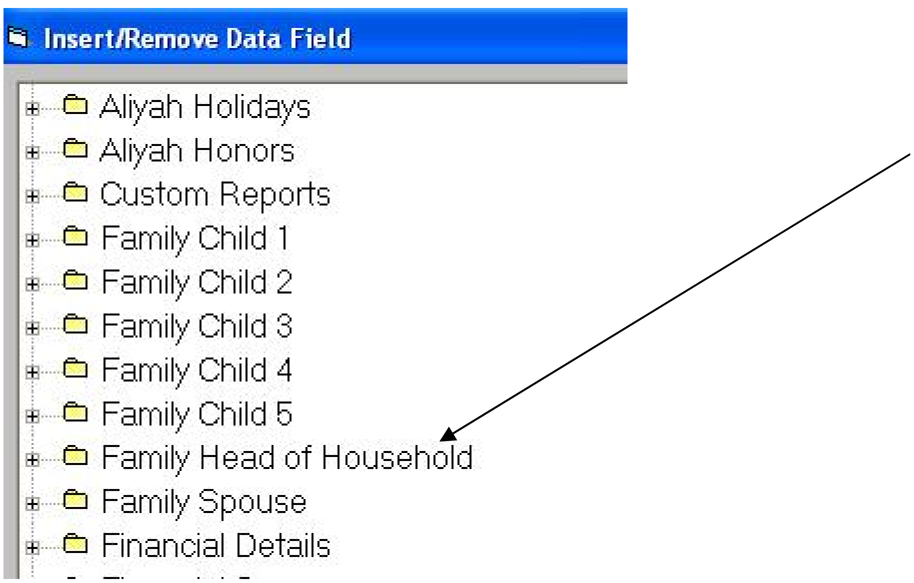
And fill in the next screen like this and click [save], then click [create edit script]



And you get a blank screen. Click the insert data icon.



Open the family head of household table



And scroll down and click Family + Member Code

Then continuing in the head of household table, click each of these fields.

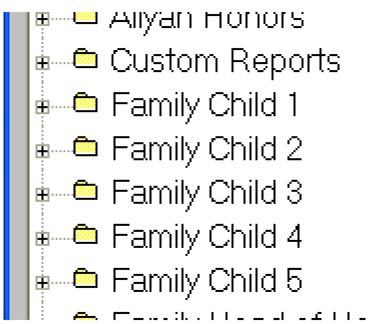
Last, first name

Email (you have 2 email fields, so I don't know which is the correct one. I used the first one in the list)

Home phone

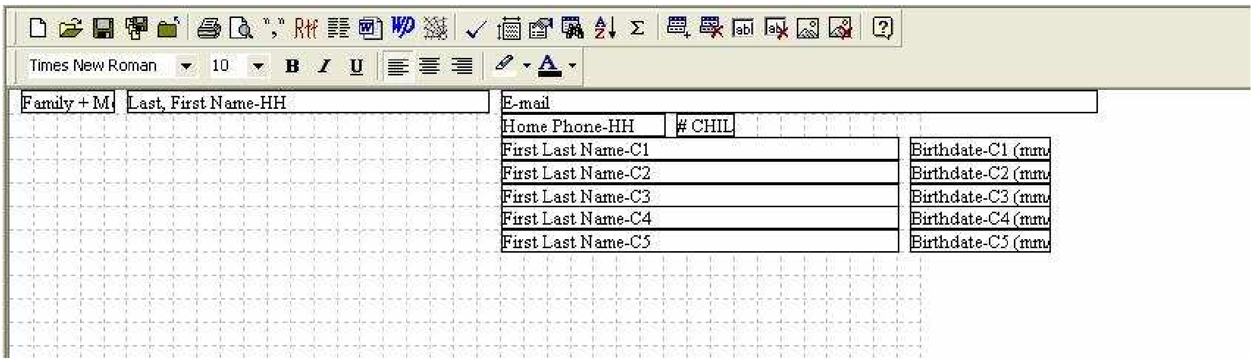
children (the data in this field is not always correct, so we are putting it on the report but not using it for the query)

Then, open Family Child 1



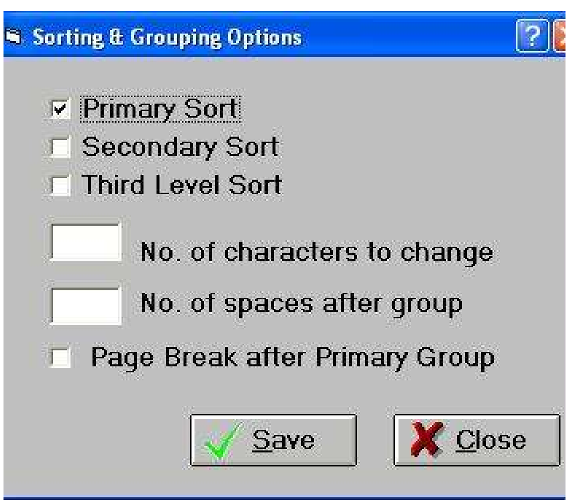
And click First, Last Name and birthdate c1 mm/dd/yyyy

Repeat for Family child 2, family child 3, family child 4, and family child 5. Then rearrange the fields so that the grid looks like this.

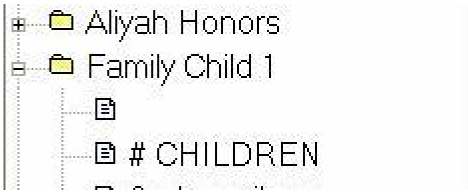


You may want to include the membership status, so include that from the Family head of household total as well, and put it to the right of #Children in the grid. Next, click family/member code data field and click that AZ sort icon

And select primary sort and click [save]

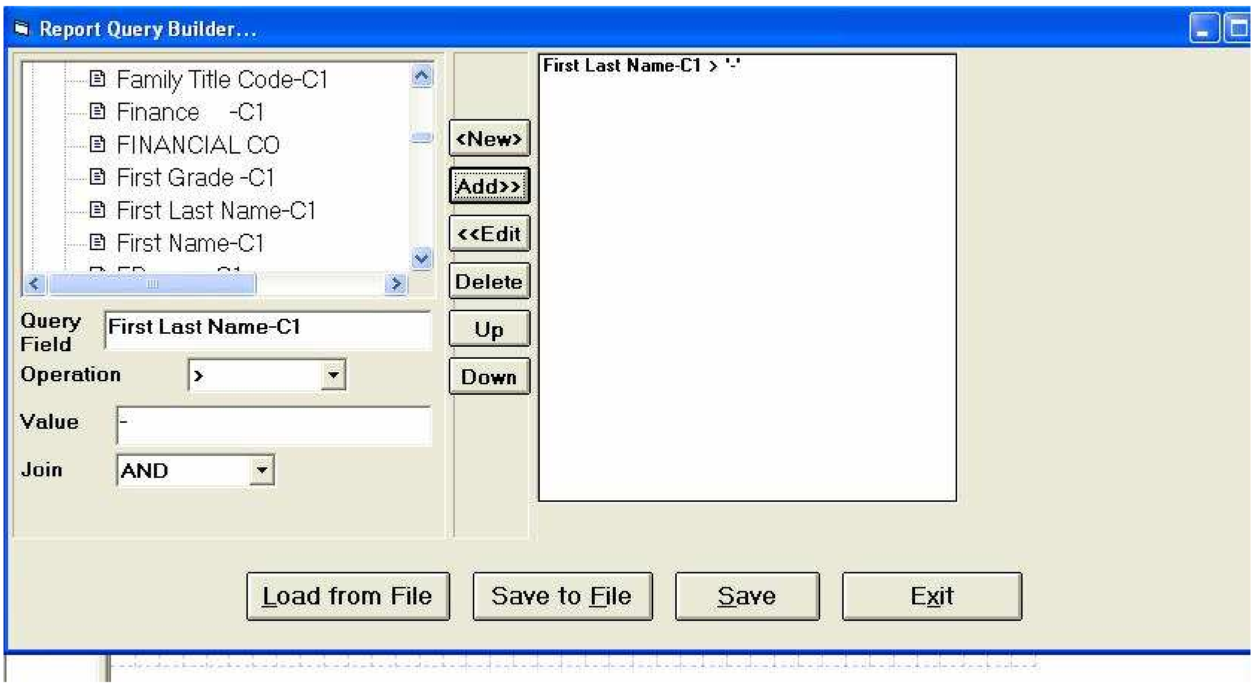


Click the filter (binoculars) icon, and open the Family Child 1 table, and scroll down to First Last Name and click

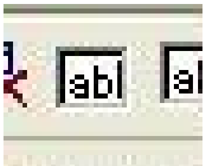


Select operation >, value - (this is a dash or minus sign)

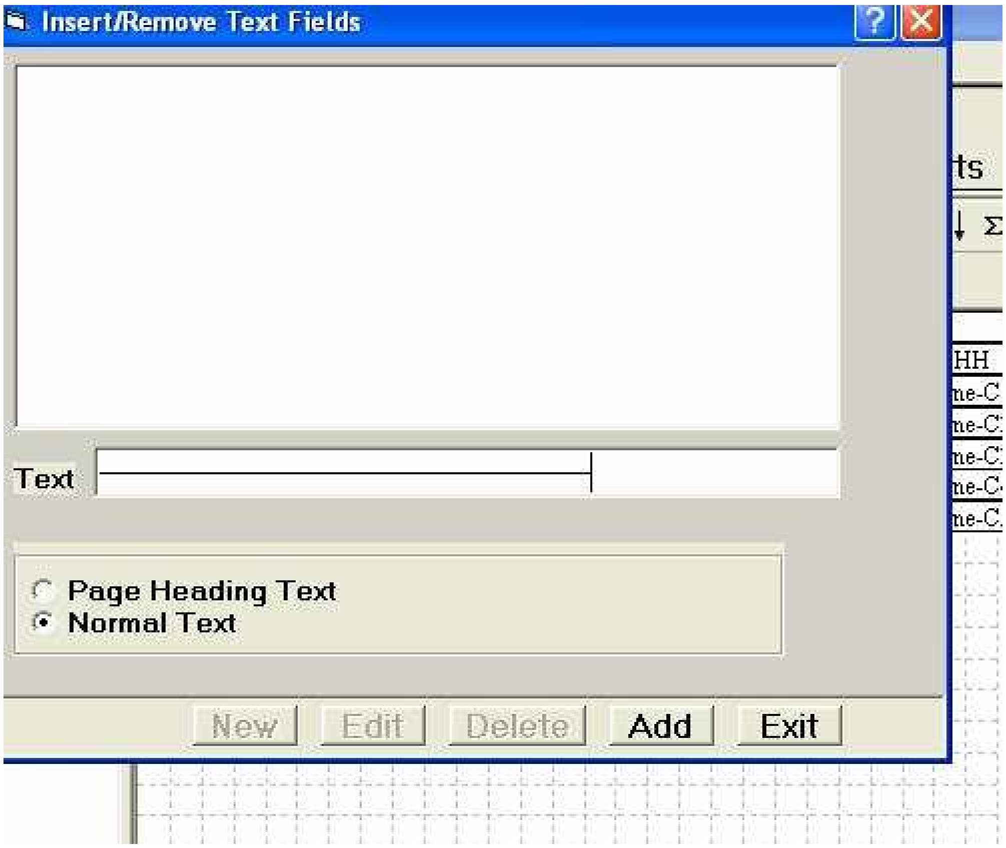
Select AND for the join and click [Add>>] and click [save]



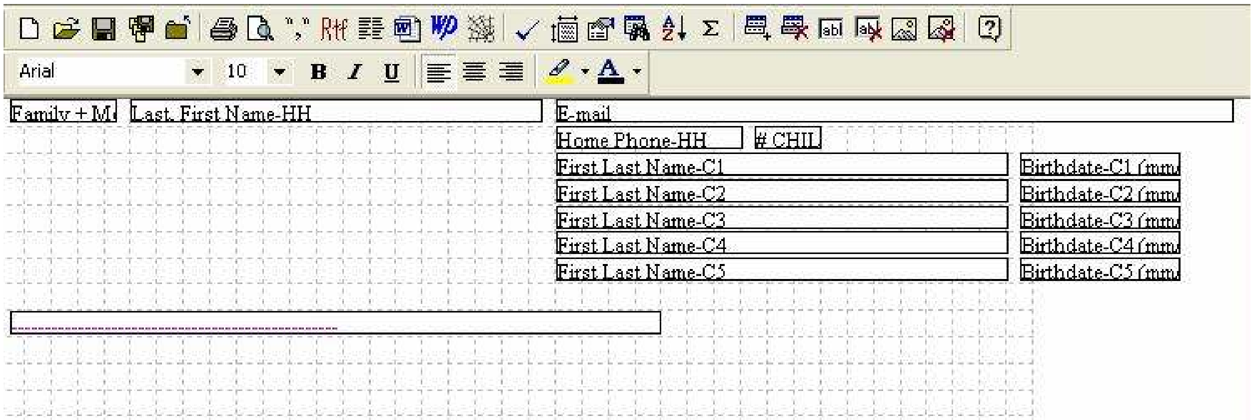
Next, to make the report easier to read, we need to draw a line between families. Click the insert text icon.



Click [new] then put in a series of dashes in the text box, make sur e the setting is **Normal text**, and click Add and then exit.

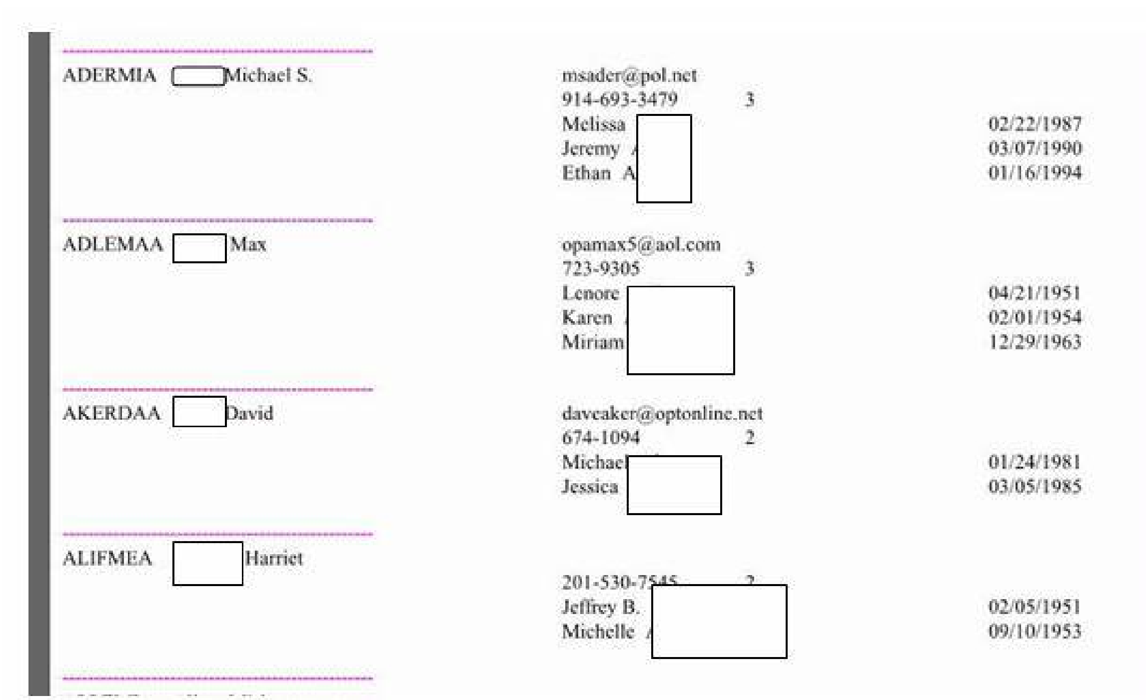


Move the dotted line to the bottom of the fields, and be sure to leave one space between the last data and the line, as shown below.



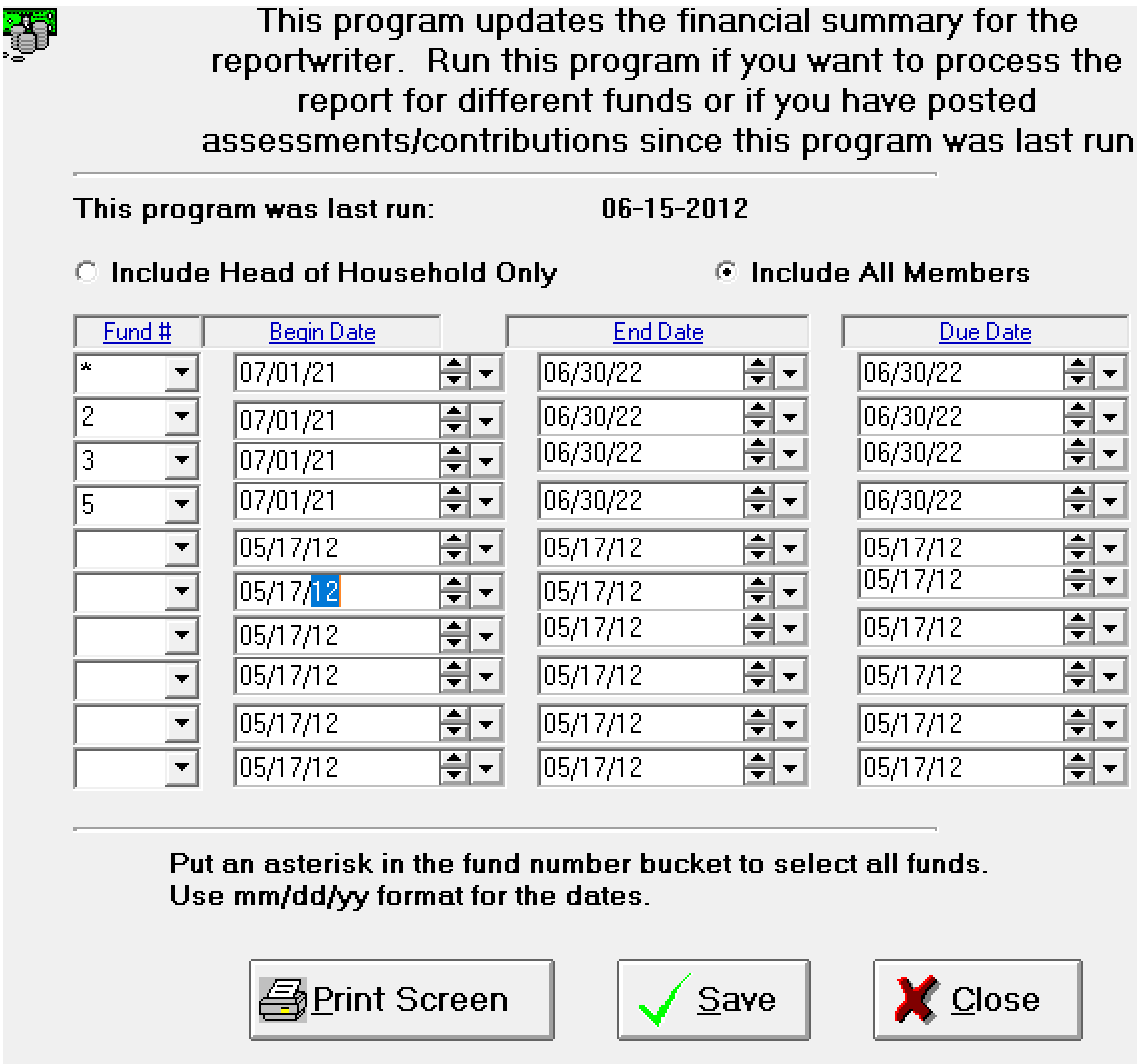
.

Since our test database has very little of this type of data, this is from a real database, but with last names blocked out.

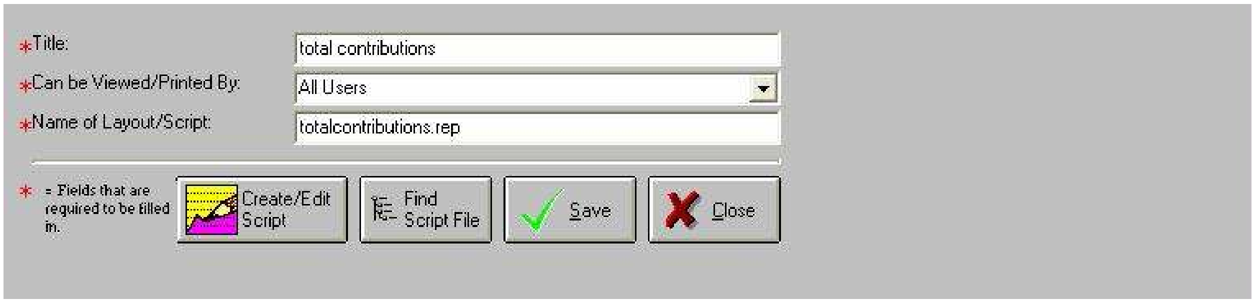


Total contributions last fiscal year for all funds

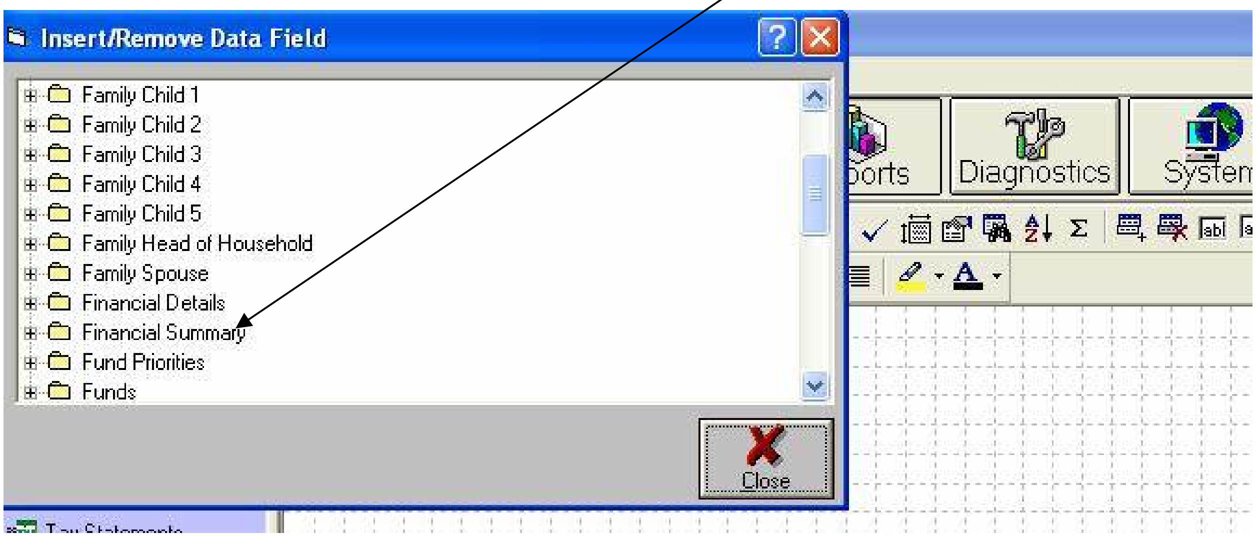
Go to [diagnostics] [Generate Financial Summary], and fill in as below. Use an asterisk to indicate a total of all funds. Put in beginning date and ending date for the last fiscal year. Due date should be same as ending date. Reply Yes to the delete the old financial summary, and create a new one.



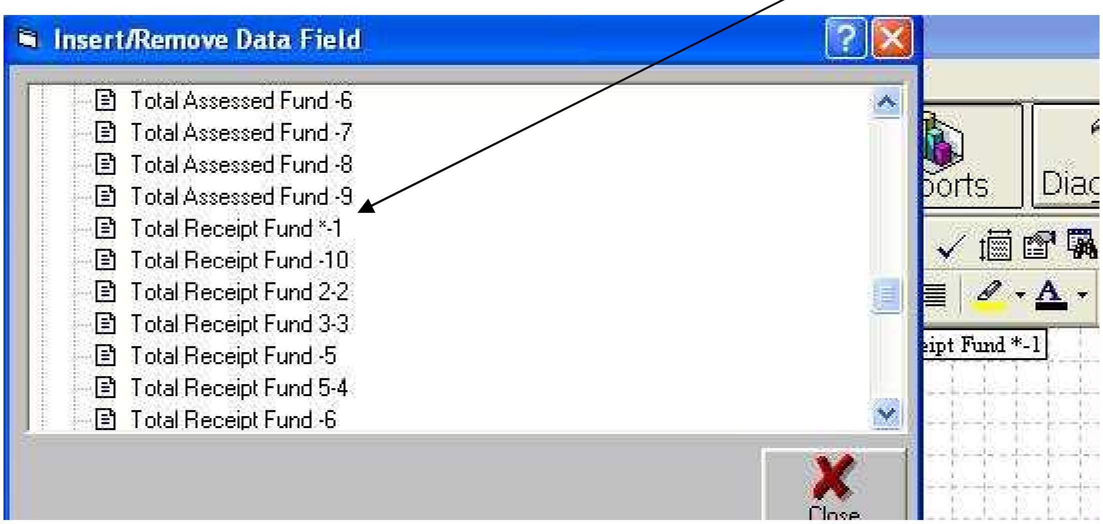
The above setup will total assessments, receipts, and balance for all funds and specifically for funds 2, 3, and 5. We are only going to select total all funds for this report, but any of the other generated fields could be put on the report. Go to [reports] [custom reports] ➔ Add ➔ set up new report name and script file name and click [create edit script file]

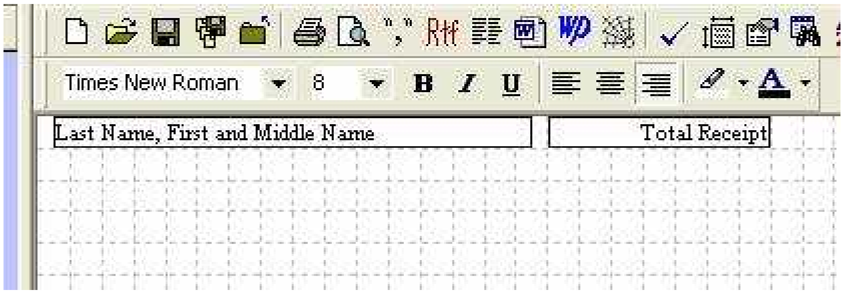


Then, on the blank grid, insert data fields, and from the membership table, insert last name, first and middle and any other info that you need. Then, still under insert data, open the Financial Summary table

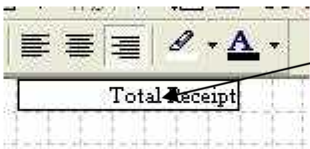


click total receipt fund *-1 (the -1 indicates the position, from 1 to 10 in the financial summary database).





Click Total Receipt on the grid and click the right justify icon.

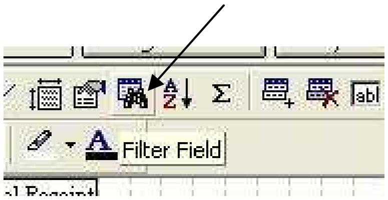


Click Total receipt on the grid, and click the sum icon and check grand total.

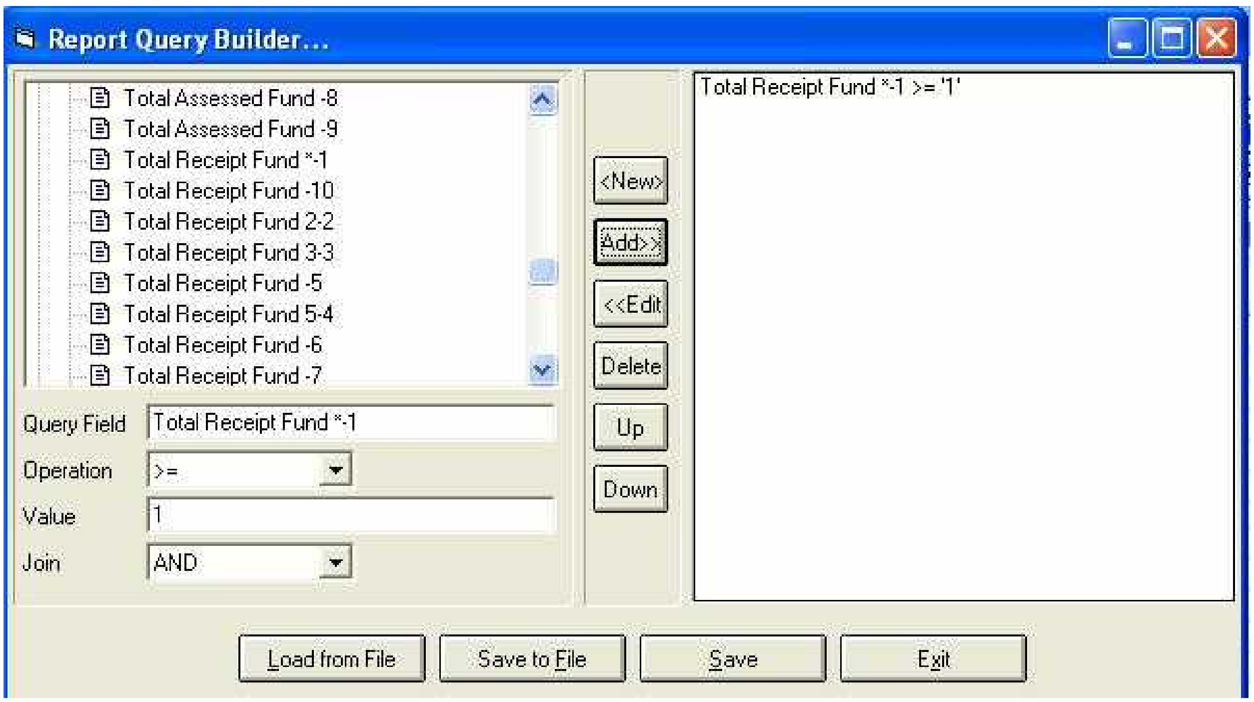
Option 1. Sort by member name: Click last name… on grid and click the A-Z sort icon, and check primary sort.

Or Option 2, To sort by total contribution, click Total Receipt, and click the Z-A sort icon. This puts the large contributors at the top.

To limit this to those members who have made a contribution, click the Total Receipt on the grid, and click the filter button (binoculars)



Open financial summary, scroll down to total receipt *-1, set operation to >=, value of 1, and join of ADD and click [add>>]   Click [save]



Now, process the report. Click this icon to print.