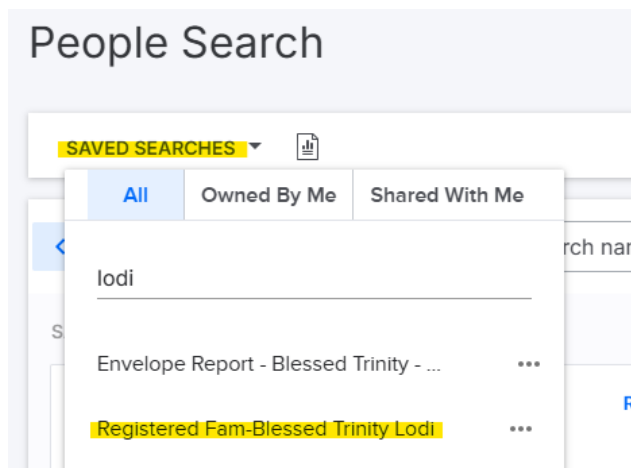


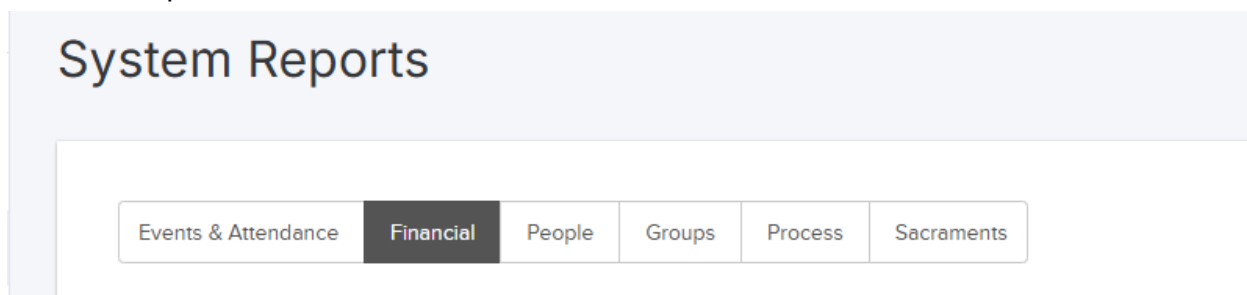
Donor Analysis between Date Ranges on Registered Parishioners:

ParishStaq allows you for some reports to layer and additional filter into the existing report. In the Donor Reports, to analyze one year or date range from another this becomes very handy. We will walk through layering a Registered Search for a parish on top of an existing system report in the steps below:

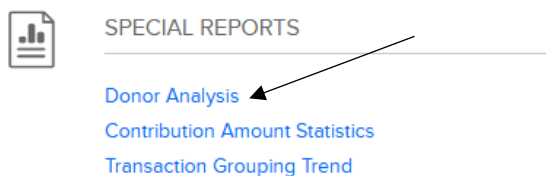
- 1) If you have an existing report, which we do in this case, and we can verify the name of the search with the **Saved Searches** area in the **People Search** screen, as seen here. Write the name down if needed in order to use it in the following steps.



- 2) Within the ChMS side, go to the **Reports & Metrics** screen and from there select **System Reports**. Next click the Financial reports:



- 3) Scroll to the bottom and select the **Donor Analysis** report, under the Special Report section:



- 4) Within the popup, report on the **Type: Families**, **Date Range** what you wish. In this example we're analyzing between two years so we want it to be a Custom Date Range spanning two years:

Date Range

Select a "Quick Date Range" from the pulldown or click into the input fields to easily enter the start and end dates.

☐ Quick Date Range...

☒ Custom Date Range

2022 — 2024
October — October

- 5) Under the ***Optional* Only use these People area**, from there click and look for the name of the Search you wish to layer into this report and select it. (you can start typing the name of the search to find it)

OPTIONAL Only Use These People

You can optionally use a saved advanced search to return a specific subset of people. For instance, you might want to include only those people who are part of a saved advanced search called "Church Members".

Registered Fam-Blessed Trinity Lodi

- 6) Make sure the Campus is correctly listed and then for the Reporting option, select it to Export to Excel.

Campus

This report can include information from multiple campuses.

- ☒ Blessed Trinity - Lodi
- ☐ Change campus selection...

Output

The On Screen report is printer-friendly. The Excel version allows you to easily manipulate the data in a spreadsheet. The CSV (comma separated values) version should be used if the other options time out.

Excel

- 7) Next within the Excel document, you will notice **that ONLY the families listed have given a donation in the system** within the time frame you specified.
- 8) In this analysis, we're comparing one year to another. For the Total, insert in a column at the end of your span of months that you're analyzing.

Donor Analysis														
Oct 2022 - Oct 2024														
This report includes transactions given by people from the Blessed Trinity - Lodi campus.														
Family ID	Family	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023
142	Tee													
40	O'K	\$290.00	\$245.00	\$260.00	\$325.00	\$250.00	\$65.00	\$445.00	\$180.00	\$130.00	\$245.00	\$125.00	\$210.00	\$170.00
819	Hez				\$60.00	\$60.00		\$120.00		\$60.00		\$60.00		\$60.00

- 9) After adding in a header, as seen below with the **First Year Sum**, do a calculation that sums the months. Typically in a format like: =SUM(C8:N8) where the cells are the different fields your totals are spanning.

Donor Analysis														
Oct 2022 - Oct 2024														
This report includes transactions given by people from the Blessed Trinity - Lodi campus.														
Family ID	Family	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	First Year Sum
14	Tee.													-
40	O'h.	\$290.00	\$245.00	\$260.00	\$325.00	\$250.00	\$65.00	\$445.00	\$180.00	\$130.00	\$245.00	\$125.00	\$210.00	\$2,770.00
819	He				\$60.00	\$60.00		\$120.00		\$60.00		\$60.00		\$360.00

- 10) Sum and add in another column for the other year/other time span you're comparing and you'll then have both a month by month analysis along with a yearly /time span analysis of all the donors gifts.

Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	2nd year Sum	Amount
\$170.00	\$60.00	\$380.00	\$125.00		\$120.00	\$303.00	\$303.00	\$75.75				\$20.00	\$20.00	\$20.00
													\$1,536.75	\$4,306.75

- 11) Lastly, if you wish, hide the monthly columns so you only show the sum of your analysis.

Donor Analysis				
Oct 2022 - Oct 2024				
This report includes transactions given by people from the Blessed Trinity - Lodi campus.				
Family ID	Family	1st Year Sum- 10/22 to 9/23	2nd year Sum- 10/23- 9/24	Amount
14	Tee	-	\$20.00	\$20.00
40819	O'K	\$2,770.00	\$1,536.75	\$4,306.75