

Printing Contributions Reports at Year-End

ACS provides several statistical reports that you can use to analyze pledge and giving patterns in your church or organization. You can also perform searches in ACS to obtain the contributor data for these reports.

You can print these reports at any time, and you can select any date range you want.

Printing Reports

At year-end, you can print contribution reports that show a detailed list of transactions, or reports that show summary information. You can also print reports that include pledge information.

You may also want to print the Unfinished Postings Report. This report lists any entries that are entered but not posted, and the user who made the entries.

Here are some List reports you may want to print at year-end:

| Report | Description |
|------------------------------|--|
| Gift Detail Listing | Creates a list of each contributor's gifts for the selected date range, including the Post Date, Type, Fund, Gift Amount, Check Number, Value of Service, and Gift Descriptions. A summary, including the amount given, value of service, count (number of gifts), mean amount (grand total divided by the total count), low amount, high amount, and percent total for each fund. |
| Pledge Detail Listing | Creates a detailed list of pledges for a selected date range, including the pledge amount, frequency, start and stop dates, total pledge amount, pledge-to-date amount, and total gifts to date, including prepayments. |
| Pledge /Gift Report | Creates a list of summary totals for each fund for the selected date range, sorted by contributor. The report includes each Fund the contributor gave to, the Total Pledge Amount, Pledge Gifts this Period, Pledge Gifts Prior Periods, Non Pledge Gifts, and Pledge Balance. |

Here are some Statistics reports you may want to print at year-end:

| Report | Description |
|--|---|
| Pledge to Date Status by Individual | Creates a list that includes the Pledge to Date amount, Gifts to Date amount (including Prepayments), the difference between the two amounts, the percentage of the pledge that has been paid, and the Pledge Status. |

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|--|--|
| Pledge /Gift Comparison | Creates a list that compares gifts, pledges, or both over two different years or the same year. It includes the difference between the two amounts, the percent change between the two amounts, and the pledge status. Gift totals do not include prepayments. |
| Pledge /Gift Totals by Fund | Creates a list that compares pledge and giving totals by fund and lists the Fund Description, Total Pledge Amount, Pledge To Date Amount, Total Gifts, total count of pledges, and total count of gifts. Gift totals do not include prepayments. |
| Summary Gift Totals by Fund | Creates a list of funds and the Week-to-Date, Month-to-Date, and Year-to-Date totals. Only funds that have gifts or pledges for the selected date range are included. |
| Summary Gift Totals by Individual | Creates a list of individuals with Week-to-Date, Month-to-Date, and Year-to-Date totals for all or selected funds. |
| Summary Gift Totals by Month | Creates a list of months and the total gifts received for each month. |

1. Under **Searches and Reports**, click the **Reports** tab.
2. Select **Contributions Reports** in the drop-down list and click **Go** .
3. Under **Report Type**, expand the type of report you want to print.
4. Select the report you want to print.
5. In the lower sidebar, enter the date range you want to display on the report, then click **Customize**.
6. Make any custom selections on the **Report Options** tab.
7. Click **Preview** or **Print**.

Performing Searches

ACS Searches provides all the tools you need to filter your data to find specific information for use in reports, communications, and extracts. You can perform a search to locate records of organization members with something specific in common.

When you search in ACS, enter your criteria and then process the search. You can view the results immediately after the search is complete. Use the search results to print reports or send out correspondence through mail merge or email. You can also export the search results for use in other programs such as Microsoft Excel®.

1. Under **Searches and Reports**, click **Searches**.

2. On the **Search Information** tab, select the appropriate settings.
3. Enter new search criteria by doing one of the following:
 - Click **New Search** to enter new search criteria.
 - Click **Edit Search** to edit existing search criteria.
 - Click **Load Criteria** to use previously saved search criteria.
4. Click **Process**.
5. View the results of your search on the **Results** tab.
6. Select your choice of output from any of the following:
 - Reports
 - Labels
 - People Exports
 - Advanced Export
 - Mail Merge
 - E-mail

Saving Searches

After you perform a search and determine that the criteria produces the results you want, you can save the search to use again as necessary.

This is helpful for reports that you print only once or twice a year. With a saved search, you do not have to remember the criteria you used or spend time printing unnecessary reports.

1. In the Search window, click the **Search Information** tab.
2. Click **Save Criteria**.
3. Enter a name for the search criteria in the **Title** field.
4. If you want other ACS users to have access to the saved criteria, select the **Public** option.
5. Click **Save**.
6. Save **Search Criteria**.