

Contribution Lists

In Contributions, you can customize and print list reports that display contributor, gift, giving history, and pledge details, along with much more. You can also customize your report options to control how your data displays.

Here's a description of each Contribution List report:

Report	Description
Contributor Listing	Creates a list of each contributor's Envelope Number, Name, Address, Phone, Contributor Type (Individual or Combined), Statement Flag (Mail, E-mail, or None), and Active Flag.
First Time Givers Report	Creates a list of contributors with a first time gift in the selected date range. It includes the name, address, date, and amount of the first time gift.
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.
Giving Plans Listing Monthly Giving Totals	Creates a list of Giving Plans, including the Fund Code and Description, Envelope Number, Contributor Name, and the Total Pledge amount for each plan. Creates entries listed by contributor, and includes the giving amount for each contributor by month. It also shows the giving total for a selected year for each contributor.
Monthly Posting Register	Creates a list that includes the weekly gift amount, MTD, and YTD total for each contributor who gave during the selected time period. A summary page that includes a YTD total for all contributions prints at the end of the report. You can print this report in portrait or landscape format.

Multi Year Giving Report	<p>Creates a list of summary giving totals for each fund for the selected date. Entries are listed by contributor and include the YTD gifts for the selected year, the previous four years, and total giving amounts for each contributor.</p> <p>You can display 5 years of giving history (Portrait orientation) or 10 years of giving history (Landscape orientation).</p>
Multi Year Pledge Report	<p>Creates a list of summary totals for each fund for the selected date. Entries are listed by contributor and include the Fund, Total Pledge Amount, Year-to-Date Gifts for the selected year and the previous three years, and the contributor's pledge balance.</p>
Pledge Detail Listing	<p>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.</p>
Pledge Giving History	<p>Creates a list per contributor of pledges for the date range selected, along with all gifts applied. You can customize this report to print gifts within the selected range and the pledges they are applied to.</p>
Pledge /Gift Report	<p>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.</p>
Unassigned Envelope Number Listing	<p>Creates a list of envelope numbers not assigned to individuals in ACS. You can limit the range of unassigned numbers that print on the report.</p>
Unfinished Postings	<p>Creates a list of gifts that have not been posted. Use this report to verify that all transactions have been posted prior to year-end. Transactions from SpeedCheck and/or Access ACS Import also display.</p>
Void Report	<p>Creates a list of voided transactions for the selected date range. The list includes the Contributor, Post Date, Void Date, Void User, Fund Code, Description, and Reference number.</p>