#### Pages / ... / CDM+ 9.3/DonorWorks 9.1

# **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.

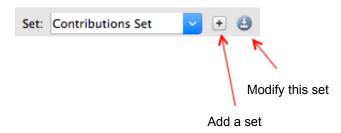
### Interface Changes

Mhere 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.

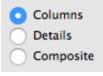


The list of columns in the selected set has been enlarged, and the button to configure sorts has moved below this list. This ensues the left side of this options pane is consistent between custom listings and exports.

*Full Giving Unit Name
Contribution Date
Total Contribution Amount
Contribution Breakdown
(* alials 🔿 to sustaining field)
(* click 🕘 to customize field)
Configure Sorts and Totals
configure sorts and rotais

## **Report Types**

Previous versions of CDM+ and DonorWorks 9 offered choices to pivot or to print counts only. In CDM+ 9.3/DonorWorks 9.1, these options have coalesced into a set of traditional report types, Columns, Details and Composite.



Each type offers slightly different options.

Option	Columns	Details	Composite
Force columns to fit on 1 page	0	×	0
Horizontal divider	0	0	×
Blank line between results	0	0	×
Show striping	0	×	×
Address under column 1 (on selected reports)	0	0	×
Page by record	×	0	×

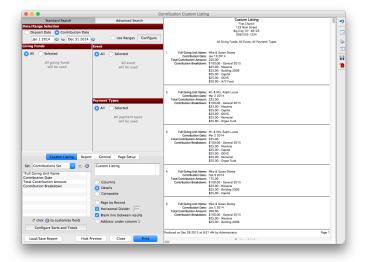
#### Columns

This is the traditional custom listing default, with each column in the set as a column on the report and each record as a row.

• • •	U	ontribution Custom Li	buily			
Standard Search Date/Range Selection Deposit Date O Contribution Date Jan 1 2014 V to Dec 31 2014 Wing Funds	Advanced Search		All Giving F	Custom Listing First Church 123 Main Street Big Dty, KY 40123 606/555-1234 ands; All Event; All Payme	ent Types	
-		Ed Chine link Norm	Contribution Data To	al Contribution Amount	Contribution Breakdown	
All Selected     All giving funds     will be used	All Selected     All event     will be used	Mike & Susan Disney			\$100.00 - General 2015 \$25.00 - Missions \$25.00 - Building 2005 \$25.00 - Capital \$25.00 - Capital \$25.00 - OdHS \$50.00 - OdHS	
	Payment Types           All         Selected	2. Mr. & Mrs. Ralph Lucas	Mar 2 2014	225.00	\$100.00 - General 2015 \$25.00 - Missions \$25.00 - Capital \$25.00 - Opital \$25.00 - Memorial \$25.00 - Memorial \$25.00 - Organ Fund	
	All payment types will be used	3. Mr. & Mrs. Ralph Lucas	Mar 2 2014	225.00	\$100.00 - General 2015 \$25.00 - Masions \$25.00 - Capital \$25.00 - OcHS \$25.00 - Memorial \$25.00 - Memorial \$25.00 - Organ Fund	
Custom Listing Report	General Page Setup	4. Mike & Susan Disney	Feb 9 2014	175.00	\$100.00 - General 2015 \$25.00 - Missions \$25.00 - Building 2006 \$25.00 - Capital	
Set: Contributions Set	Custom Listing OColumns	5. Mike & Susan Disney	Jan 5 2014	200.00	\$100.00 - General 2015 \$25.00 - Maxions \$25.00 - Building 2006 \$25.00 - Capital \$25.00 - Bianket Sunday Off.	
ontribution preakdown	Details Composite Force columns to fit on 1 page Horizontal Divider	6. Mike & Susan Disney	Feb 9 2014	175.00	\$100.00 - General 2015 \$25.00 - Missions \$25.00 - Building 2006 \$25.00 - Capital	
(* click 🕘 to customize field) Configure Sorts and Totals	Blank line between results     Show Striping     Address under column 1	7. Mike & Susan Disney	Feb 9 2014	175.00	\$100.00 - General 2015 \$25.00 - Missions \$25.00 - Building 2006	
Load/Save Report Hide P	review Close Print	Produced on Dec 28 2015 a	t 8:30 AM by Administr	ator		Page 1

### 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.

•••		Contribution Custom Listing Custom Listing	1.01
Standard Search Date/Range Selection Deposit Date Contribution Da		Custom Listing First Object 123 Main Street Big City, KY 40123 DGC/555-1274	•
Jan 1 2014 🛷 to Dec 31 201	4 🛷 🗌 Use Ranges Configure	All Giving Funds: All Event; All Payment Types	
living Funds	Event	An owng rolles, An event, An reyment Types	
• All Selected	O All Selected	Counts Total Contribution Amount	
All giving funds will be used	All event will be used	Ims 52014 5 1000.00 Ims 12014 5 1000.00 Ims 12014 2 1000.00 Ims 22014 2 300.00 Ims 22014 2 1300.00 Ims 22014 2 1150.00 Ims 22014 9 1800.00	
	Payment Types All Selected All payment types	•	
	will be used	_	
Custom Listing Rep	ort General Page Setup		
Set: Contributions Set 💽 💌 🖲	Custom Listing		
Contribution Date Total Contribution Amount Contribution Breakdown	Columns Details Composite		
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(* click 🕘 to customize field)			
Configure Sorts and Totals		Produced on Dec 28 2015 at 8:35 AM by Administrator	Page 1
Load/Save Report Hic	le Preview Close Print		Page 1
		•	

### 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.

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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.

Standard Search	Advanced Search	Totals for Feb 2 2014				17
Nate/Range Selection					300.00	
Deposit Date O Contribution Date			Feb.1	2014		
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iving Funds	Event	2. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY: 40123-2318	175.00	
All Selected	O All Selected	3, 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY. 40123-2318	175.00	
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will be used	will be used	5. 101	Mke & Susan Disney	107 Peachtree Dr. Apt 2 Big Ony, KY: 40123-2318	150.00	
		6. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big City, KY, 40123-2318	150.00	
		7, 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big City, KY, 40123-2318	150.00	
		Totals for Feb 9 2014				
					1150.00	
			Feb 2	3 2014		
	Payment Types	1. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY 40123-2318	250.00	
	All Selected	2. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY 40123-2318	250.00	
	•	3. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY 40123-2318	250.00	
	All payment types will be used	4. 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2 Big Oty, KY 40123-2318	250.00	
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		1, 101	Mike & Susan Disney	107 Peachtree Dr. Apt. 2	150.00	
		2. 101	Mike & Susan Disney	Big City, KY 40123-2318 107 Peachtree Dr. Apt 2 Big City, KY 40123-2318	150.00	n.
		3, 101	Mike & Susan Disney	107 Peachtree Dr. Apt 2	150.00	ľ
Custom Listing Report	General Page Setup	4, 118	Mr. & Mrs. Ralph Lucas	Big City, KY 40123-2318 1259 Chatman Lane	225.00	
Set: Contributions Set 🔽 💌 😃	Custom Listing	Produced on Dec 28 2015 at 1			Page 2	
iving Unit Code Full Giving Unit Name			Custor	n Listing		
Address Block atal Contribution Amount	<ul> <li>Columns</li> </ul>	Giving Unit Code	Full Giving Unit Name	Address Block	Total Contribution Amount	
otal Contribution Ambont	O Details	5 114	Mr. & Mrs. Raiph Lucas	Big City, KY 40123 1299 Chatman Lane	225.00	
	Composite	6, 114	Mr. & Mrs. Raigh Lucas	Big Oty, KY 40123 1299 Chatman Lane	225.00	
	Force columns to fit on 1 page	2, 118	Mr. & Mrs. Raiph Lucas	Big Oty, KY 40123 1299 Chatman Lane	225.00	
	Horizontal Divider			Big Oby, KY 40123		
	Blank line between results	8. 118	Mr. & Mrs. Raiph Lucas	1299 Chatman Lane Big Oty, KY 40123	225.00	
(* click 🕘 to customize field)	Show Striping	9. 118	Mr. & Mrs. Raigh Lucas	1299 Chatman Lane Big Oty, KY 40123	225.00	
Configure Sorts and Totals	Address under column 1	Totals for Mar 2 2014				
					1800.00	
Load/Save Report Hide P	review Close Print					

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

• • •		Contribution Custom Listing	
Standard Search	Advanced Search	Custom Listing	
ite/Range Selection		123 Main Street	-
Deposit Date O Contribution Da		Big Dty, KY 40123	
		606/555-1234	
Jan 1 2014 🛷 to Dec 31 201	14 🛷 Use Ranges Configure	All Giving Funds; All Event; All Payment Types	
ing Funds	Event		
All Selected	All Selected	Counts Total Contribution Amount	-
	• • •	Jan 5 2014 5 1000.00	
All giving funds	All event	Jan 19 2014 6 1500.00	
will be used	will be used	Jan 26 2014 1 150.00	
		Feb 2 2014 2 300.00 Feb 9 2014 7 1150.00	-
		Feb 9 2014 7 1150.00 Feb 23 2014 4 1000.00	
		Mar 2 2014 9 1800.00	
		Grand Totals for 34 Records	
		6300.00	
	Payment Types		
	<ul> <li>All Selected</li> </ul>		
	All payment types		
	will be used		
Custom Listing Rep	port General Page Setup		
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tal Contribution Amount	<ul> <li>Details</li> </ul>		
	Composite		
	Force columns to fit on 1 page		
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(* click 🥘 to customize field)			
Configure Sorts and Totals		Produced on Dec 28 2015 at 9:00 AM by Administrator	Page 1
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Click Configure Sorts and Totals and check or un-check Show Grand Totals to turn grand totals on or off.

Sort by:	Contribution Date	🔽 💽 Ascending 📄 Descending 🛛 🔽 Subtotal 📄 New Pag
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then by:	None	Subtotal New Pag
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then by:	None	Subtotal New Pag
then by:	None	🔽 💽 Ascending 📄 Descending 📄 Subtotal 📄 New Pag
	🗹 Show Grand Total	
		Cancel

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

Standard Search Date/Range Selection Deposit Date O Contribution Date Jan 1 2010 v to Dec 31 2015		Curton Listing First Courch 123 Man Street Bg Crb, (* Vol 23 6005555 123 Al Grog (rote: Al Event Al Syment Types	
iving Funds	Event	All delight deals, All control, All regiment regime	
All given funds All given funds will be used	All Selected All event will be used All Selected All payment types will be used	Carell         Datal         Manual           1         152.00           1         152.00           1         152.00           1         100.00           1	
Custom Listing Repo Set: Contributions Set V + C Detail Amount	rt Ceneral Page Setup	no 8 501 7 2 2520 10 4 501 7 2550 10 5 50 7 1 2550 10 5 50 7 1 2560 10 5 500 7 1000 7 1000 7 1000 7 1000 7 10000 7 100000000	
	Columns Details Composite Force columns to fit on 1 page		
(* click 🎒 to customize field)			
Configure Sorts and Totals		Produced on Dec 28 2015 at 9:01 AM by Administrator Page 1	
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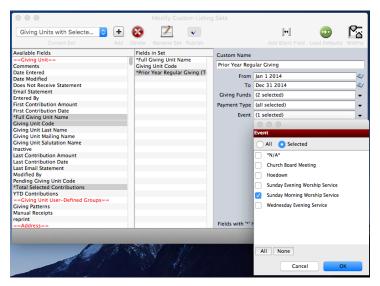
### New columns

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

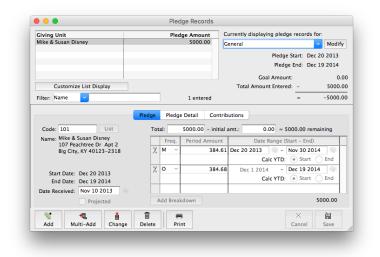
Pledge records gain these columns to aid the user in creating a pledge statement.

- 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:



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

•	Pledge Letters	
) 🔟 📙 🚺 🛛		
around the world follows: 384.61 Monthly 384.68 One time	an, th for your pledge of 5000.00 to our ministry. Thanks to giffs like yours we are able to reach with help for the needy and hope for the oppressed. For your records, your pledge is recorded as trom Dec 20 2013 to Nov 30 2014 from Dec 12 014 to Dec 19 2014 aur faithfulness to His kingdom.	0
		1.

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