

Receipting Amount Payment Method Date ...NEW! and Updated!

This is a particularly powerful Q-Xpress selection. The video opens up existing and new features.

There are multiple criteria that can be used to focus on data selections.

Here is a list of how it can be used:

1. Find all donations with dollar amounts (gift data) by date range.
2. Find all donations with dollar amounts by a campaign type, campaign code or both.
3. Find all donations with dollar amounts by Batch Number range and Date range.
4. Find all donations with dollar amounts in a specific date and dollar range. Please note these are individual gifts and not accumulated values.
5. Find all donations with dollar amounts with a specific payment type, like Gift in Kind or our small 'p' pledge.
6. Find all donations with dollar amounts that are Charitable or Non-Charitable.
7. Find all charitable donations with dollar amounts where No Receipt is required.
8. Find all donations with dollar amounts that use the Mailing List by value or where the value is missing.
 - a. The Mailing List uses the Campaign Prospect Report which displays a count of gifts and total dollars by Mailing List field.
9. Find all donations with dollar amounts which are yearly, showing the yearly total in the Amount field.
10. Find all Voided donations with dollar amounts by date range.
11. Find all donations with dollar amounts for a specific donor by date range.
12. Find all donations with dollar amounts for a specific or group or Acquired By individuals or organizations.
13. Find all donations with dollar amounts by Fiscal Year.

*** Where donations are requested for a 'Significant Other' couple who Share a Donor Summary, Include Dollar Amounts cannot be selected as @EASE only reports who is credited with the gift.

*** **Do Not** over select when choosing criteria ... it is NOT necessary in most cases.

For example to find all charitable gifts in kind from organizations by fiscal year.

Enter only the date range, check off Payment Method – Gift in Kind, under Receipt Type choose Charitable and under Donor Type select Corporate. Don't forget to Include Dollar Amounts to get the gift details.

Download the Receipting Amount Document

(<https://s3.amazonaws.com/helpscout.net/docs/assets/5b6decf32c7d3a03f89d93d3/attachments/5ca8dd5d2c7d3a154461d9dc/Receipting-Amount-Payment-Method-Date.pdf>)

Download the format for the Q-Xpress Export File Format

(<https://s3.amazonaws.com/helpscout.net/docs/assets/5b6decf32c7d3a03f89d93d3/attachments/615b3da312c07c18afdda2d6/Q-Xpress-Export-Fields-in-Order.pdf>)

(<https://s3.amazonaws.com/helpscout.net/docs/assets/5b6decf32c7d3a03f89d93d3/attachments/5c2d96f62c7d3a31944f9cd6/Q-Xpress-Export-Fields-in-Order.pdf>)

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Which Donors gave 2500 + in the last 5 years?

You may want to find donors who have given in specific dollar ranges over the last several years.

This selection looks at accumulated giving over those years and when used over many years is ideal for donor recognition.

To find donors who have given accumulated dollars use Q-Xpress\Donors Selections.

Q-Xpress Selection (Donor By Donation Amount by Year)

Current Record Count: 32 My Records Create

Delete existing records from file Enable Suppress mail option Enable Mailing Labels Count

Amount Range
From: 2,500.00 To: 999,999.999

Donation Type
 TicketSales
 Donations
 Sponsorship
 Merchandise
 Participation

For Years From: 2015 To: 2021 [By Membership](#) [By Quality](#)

Include donations not yet updated to master
 Include Pledged

Donor Type: Both Private and Corporate

The output from this selection gives the donor name, the accumulated amount in the period requested, the number of times they donated to give the amount as well as the first and last fiscal year they donated.

Type	Fundraising	GoTo	GoTo	Sort Field	Amount	Donation	First Year Donated	Last Year Donated	Total	Year	Label	User Name	Volunteer Region
P	P000004			Abbott Kelly	2,688.00	32	2001	2021	0.00			Administrator	
P	P000031			Adams Peter J.	2,890.00	36	2002	2021	0.00			Administrator	
P	P000321			Frog Henrietta	3,175.00	6	2019	2021	0.00			Administrator	
P	P000010			Hamm John	3,185.00	94	2001	2021	0.00			Administrator	
P	P000064			Balken Bob & Joan	3,410.00	83	2010	2021	0.00			Administrator	
P	P000013			Anderson Peter	3,581.00	154	2002	2021	0.00			Administrator	
P	P000045			Norman George &	3,957.55	65	2002	2021	0.00			Administrator	
C	C002437			Old World	4,310.00	15	2001	2017	0.00			Administrator	
P	P000020			Samson Robert	4,560.00	102	2002	2021	0.00			Administrator	
C	C007067			Estate of Glen	4,845.00	26	2001	2021	0.00			Administrator	
P	P000071			Martin Doug	4,960.00	107	2012	2021	0.00			Administrator	
P	P000279			EK 78909	5,000.00	2	2016	2017	0.00			Administrator	
P	P000017			Miller Glenn	5,185.00	64	2002	2021	0.00			Administrator	
C	C002174			RBC & Associates	5,510.00	3	2001	2020	0.00			Administrator	
P	P000061			Philpott Ann M.	5,680.00	78	2015	2021	0.00			Administrator	
P	P000005			Bell Robert G.	5,698.00	162	2001	2021	0.00			Administrator	
P	P000023			McDonald Peter &	6,416.00	48	2002	2021	0.00			Administrator	
C	C000151			High Street	11,520.00	10	2001	2019	0.00			Administrator	
C	C001870			Spruce Lane	16,160.00	5	2001	2021	0.00			Administrator	
C	C003475			Riverview Rotary	25,000.00	1	2002	2020	0.00			Administrator	
C	C000776			Sunny Garden	25,690.00	30	2001	2021	0.00			Administrator	
C	C007069			Flowers by LaPue	31,510.00	7	2014	2019	0.00			Administrator	
C	C007100			Government of	100,000.00	1	2019	2019	0.00			Administrator	
C	C001505			Financial Ventures	103,120.00	11	2001	2021	0.00			Administrator	

From this list:

- you can export the list using Q-Xpress\ Q-Xpress Export
- you can select records by the range and Assign Recognition;
- you can run reports like the Donor Profile Report or Members with Donations Amounts to see they giving by fiscal year or

- run the RFM report to better view their giving.

To find donors who have given 2500 or more in each of the last five years you would use the selection Donor Summary by Year!

Last updated on March 17, 2022

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Finding Your Most Committed Donors

@EASE updates by fiscal year the total donations a donor has gifted along with a donation count.

The Donor Summary for each individual or organization records the first and last fiscal year they have donated.

This provides the charity with an opportunity to recognize donors who have gifted over a series of years in all of those years or most of those years.

Add a Committed Donor value to the Lookup Tables, Quality table. We will use the code to identify the group of donors selected to print a **Members with Donations Amount Report** or a **Donor Profile Report**.

Donor Summary by Year

Q-Xpress Selection (Donor Summary By Year)

Current Record Count: 327 My Records

Delete existing records from file Enable Suppress mail option Enable Mailing Labels Count

Amount Range
From: 250.00 To: 500.00

Donation Type
 TicketSales
 Donations
 Sponsorship
 Merchandise
 Participation

For Years
From: 2010 To: 2018
 Donated in all years
 Donated in any 1 year(s)

Donor Type: Private

Create

Features to Note:

- Provided an amount range. Only donors whose gift totals over the specified years fit into this range will be selected.
- Donations
- Year Range
- All Years

Only five records met the criteria.



The next step takes the upper value a little or the lower value a little lower.

The dollar range of \$100 - \$500 in all years found 43 records.

The dollar range of \$100 - \$1000 in all years found 46 records.

The dollar range of \$100 - \$1000 in 8 of those years found 99 records.

Go to Q-Xpress View and Assign the Quality Committed Donors to all records.

Use the Members with Donations Amounts Report. This report shows the last five years from whatever most current year provided. For each year, the total donations and donation count is listed and an average gift over the last five years.

Members with Donation Amounts

Qualities 000Committed Donors

Donation Type= Donations

Donor No	Donor Name	Status	2018		2017		2016		2015		2014		Total	Average	
P045882	Adams Andrea	Active	347	9	513	13	463	12	270	7	231	6	1,825	47	39
P002480	Anderson Gillian	Active	350	1	350	1	350	1	350	1	350	1	1,750	5	352
P009153	Andrekson Peter	Active	1,000	1	1,000	1	1,000	1	500	1	1,000	1	4,500	5	900
P054243	Ankall Corinne	Active	180	9	240	12	240	12	240	12	300	6	1,200	51	24
P014012	Baker John & Brenda	Active	500	1	500	1	500	1	500	1	250	1	2,250	5	450
P001226	Bardas Theodor & Aurelia	Active	200	2	130	2	100	2	100	2	100	2	630	10	63
P026403	Benjamin Ronald	Active	500	1	500	1	200	1	500	1	200	1	1,900	5	380
P000023	Berkhold Beverly	Active	100	1	150	1	200	1	150	1	150	1	750	5	150
P027070	Beswathnick Armanda	Active	200	1	100	1			100	1	100	1	500	4	125
P012191	Booth Robert & Kathleen	Active	450	9	600	12	500	12	600	12	600	12	2,850	57	50
P017099	Britton Christopher & Elizabeth	Active	230	1			225	1	225	1	225	1	905	4	225
P004597	Buchanan William	Active	200	1	200	1	200	1	200	1	200	1	1,000	5	200
P032456	Carey David & Kathryn	Active	250	1	500	1	500	1	500	1	500	1	2,250	5	450
P018455	Carruthers Patricia	Active			100	1	100	1	100	1	100	1	400	4	100
P015264	Cabullak Nestor	Active	200	1			150	1	200	1	150	1	700	4	175
P002686	Charles Fischer Joanne Cuthbertson &	Active	500	1	500	1			500	1	500	1	2,000	4	500
P017331	Cheung Ying	Active	100	1	100	1	100	1	100	1	100	1	500	5	100
P000027	Churchill June	Active	100	1	200	1	100	1	200	1	100	1	700	5	140
P054344	Cornigan Robert	Active	225	9	300	12	300	12	300	12	275	11	1,400	56	25
P015673	Craighead Peter & Eleanor	Active	225	9	300	12	275	11	300	12	300	12	1,400	56	25
P012419	Cullen Malcolm	Active	500	1	500	1	500	1	400	1	500	1	2,400	5	480
P053312	Currie LaRae	Active	200	1	200	1	200	1	200	1	400	2	1,200	6	200
P012876	Dalby Elsie	Active	1,000	1	1,000	1	1,000	1	1,000	1	1,000	1	5,000	5	1,000
P002291	Davidge Marilyn	Active	100	1	100	1	100	1	100	1	100	1	500	5	100
P035659	de Boon George & Janet	Active	200	1	200	1	200	1	200	1	200	1	1,000	5	200
P026816	Derbowka Glenn & Jean	Active	100	1	150	1	150	1	100	1	100	1	600	5	120
P015515	Dietrich Janet	Active	200	1	200	1	200	1	100	1	100	1	800	5	160
P016879	Dobson Keith & Deborah	Active	500	1	500	1	400	1	500	1	350	2	2,250	6	375
P013984	Down Gary	Active	500	1	500	1	500	1			500	1	2,000	4	500

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Benefits of this information:

- 1. Potential donors for a planned gift.
- 2. Opportunity to say Thank You to Committed Donors.
- 3. Donors giving \$100.00 annually may be interested in giving monthly. A gift of \$10.00 monthly is a 20% increase. A gift of \$15.00 monthly is an 80% increase.

Recognizing long term donors has its benefits. A call to thank them with the information regarding when they first gifted is priceless.

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