

# Adjutant Software Customer Support Tech Notes

Document Title: Creating a Report for a Repeating Group of Contributions  
Document Number: 033  
Applies to: Campaign ToolBox - all versions

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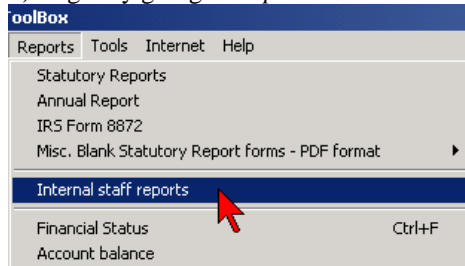
## SUMMARY

This Tech Note describes how to create a report that shows the names of persons whose records are repeated when using the *Repeat Group of Contributions* function. The report created will show the person's name one time, even though they may have made multiple contributions. Use this report when you need to edit records or delete records from the repeat list. This same procedure applies to any custom report you might want to create.

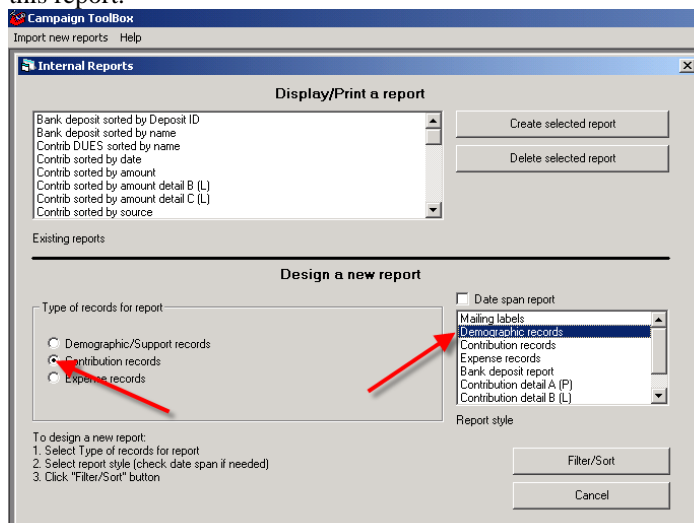
## PROCEDURE

This report is created using the Internal Staff Reports.

1) Begin by going to *Reports > Internal staff reports*.



2) In the bottom section of the form, select Contribution records from the *Type of records* for report. Select Demographic records for the *Report Style*. After making your selections, click the *Filter/Sort* button. If you wanted to restrict the report to a date span, you would check the *Date span report* box, but that would not be appropriate for this report.



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3) Select ContribSource and Equal to in the first two columns. In the third column, type in the Contribution Source that you select when you are creating your repeated group of contribution records. This must be entered exactly as it is on the list. In this example, it is "Group 1". When you are finished, click on the *Sort Records* tab at the top.

The screenshot shows the 'Filter and Sort Records' dialog box with the 'Filter Records' tab selected. It features a table with three columns: 'Field:', 'Comparison:', and 'Compare To:'. The first row is populated with 'ContribSource', 'Equal to', and '[Group 1]'. Below the table is a 'Query text' field and a row of buttons: 'Create query', 'Use modified SQL', 'Clear Filters', 'OK / Continue', and 'Cancel'.

4) Select the fields you want the records sorted by. In this example, the records will be sorted by last name, then by first name. You can sort by up to three different fields. When you are finished, go back to the *Filter Records* tab.

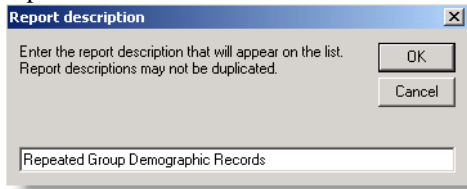
The screenshot shows the 'Filter and Sort Records' dialog box with the 'Sort Records' tab selected. It has three 'Sort By:' sections. The first is set to 'LastName' with 'Ascending' selected. The second is set to 'FirstName' with 'Ascending' selected. The third is empty. A 'Clear Sorts' button is at the bottom right.

5) Click on the *Create Query* button, then click on the *OK / Continue* button.

The screenshot shows the 'Filter and Sort Records' dialog box with the 'Filter Records' tab selected. The table and buttons are the same as in the previous screenshot. A red arrow points to the 'Create query' button.

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6) You will be prompted to enter a report description. This is the description that will appear in the list of available reports.



7) To print the report, double-click on the report in the list at the top of the form in *Display / Print a Report*.

## NOTES

*None*