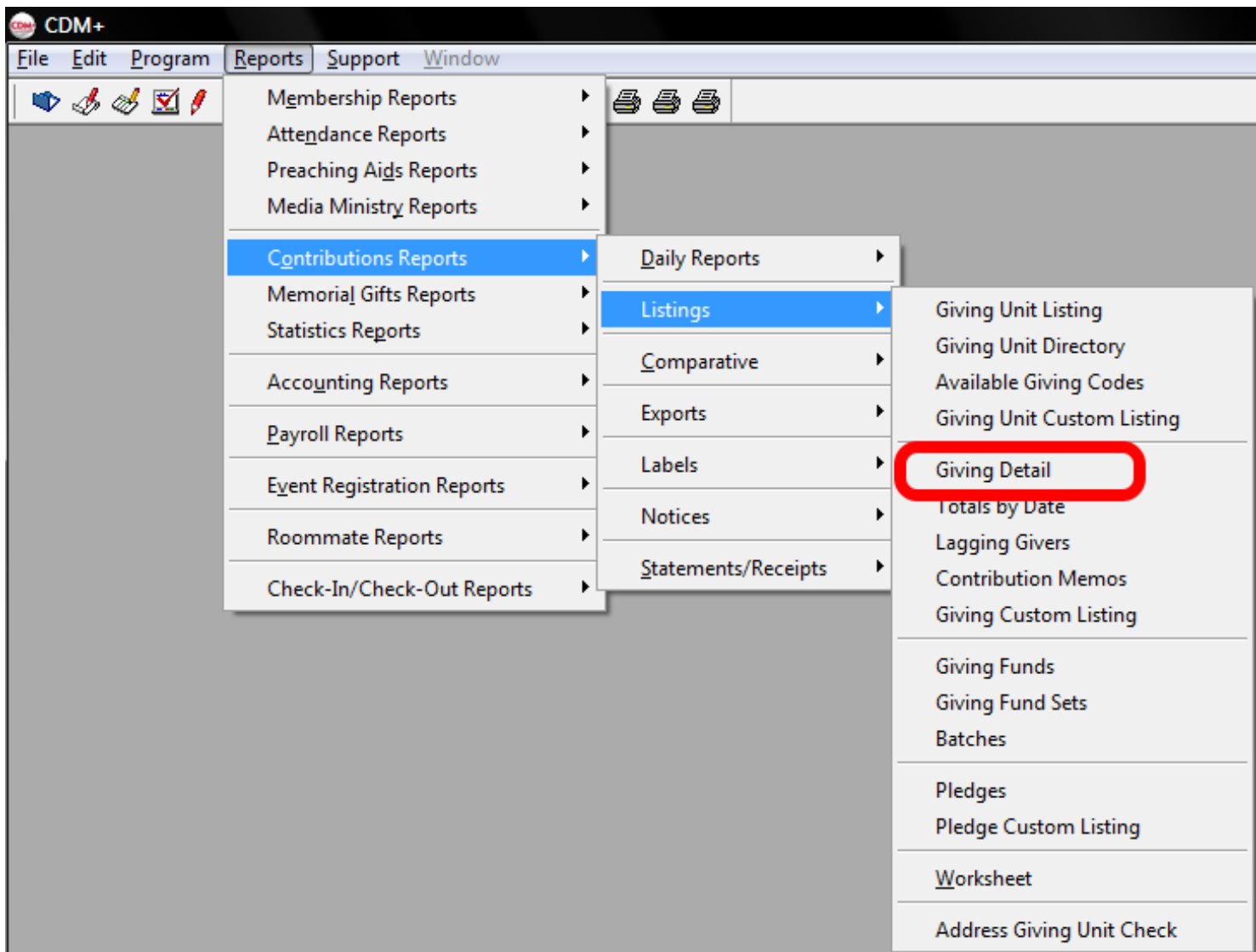


Moving Information from CDM+ to Microsoft Excel

There are any number of examples of how moving information from CDM+ to Microsoft Excel is helpful. In this example we will show how to move the Giving Detail Listing produced in CDM+ into Excel in order to obtain the same report sorted by total contribution amount.

Select Desired Report



Select the desired report. In this example, we are using the Giving Detail Listing from the Contribution Reports - Listings menu.

Configure desired report and select Report Destination

The image shows two windows from a software application. The top window is titled "Giving Detail" and contains various search and report configuration options. The bottom window is titled "Select Report Destination" and shows different output options for the report.

Giving Detail Window:

- Standard Search:** Date Selection (Current Year, Date Range), Offering/Deposit, From: JAN 1 2008, To: DEC 31 2009.
- Advanced Search:** Events (N/A*, Church Board Meeting, Sunday Evening Worsh, Sunday Morning Worshi, Wednesday Evening Se), Giving Funds (General, Missions, Building, Capital, OGHS, Memorial, A/C Fund, Recreation Teams).
- Report Configuration:** Report Type (Detail, Composite, Giving Unit Comp, Unit Comp Address), Sort Order (Giver's Code, Ascending, Descending), Giving Unit Selection (Current Code, Pending Code), Report By (Giving Fund, Giving Unit), Report Options (Show Detail Note).
- Buttons:** Revert to Defaults, Show Preview, Close, **Print** (circled in red with a yellow circle containing the number 1).

Select Report Destination Window:

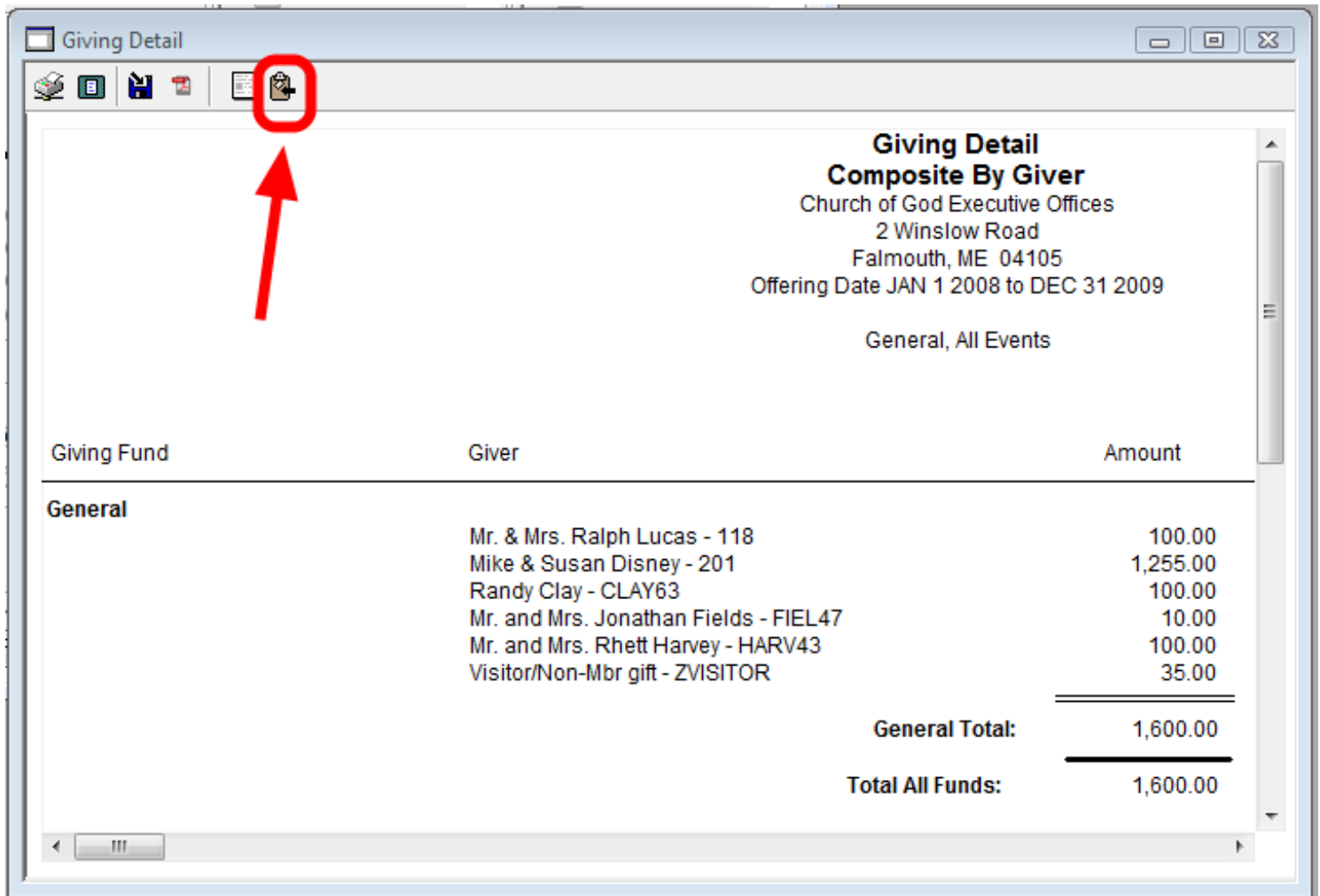
- Options:** Screen (circled in red with a yellow circle containing the number 2), Printer, Report File, PDF, Text File, Clipboard (with a yellow circle containing the number 3).
- Buttons:** Cancel, OK.

Once you have configured your report properly,

1. Press the Print Button'
2. From the Select Report Destination Window, select Screen as the desired destination.

You may also select the Clipboard as your destination (#3 above), however it is HIGHLY recommended that you select the screen.

From the Print to Screen window, select Clipboard

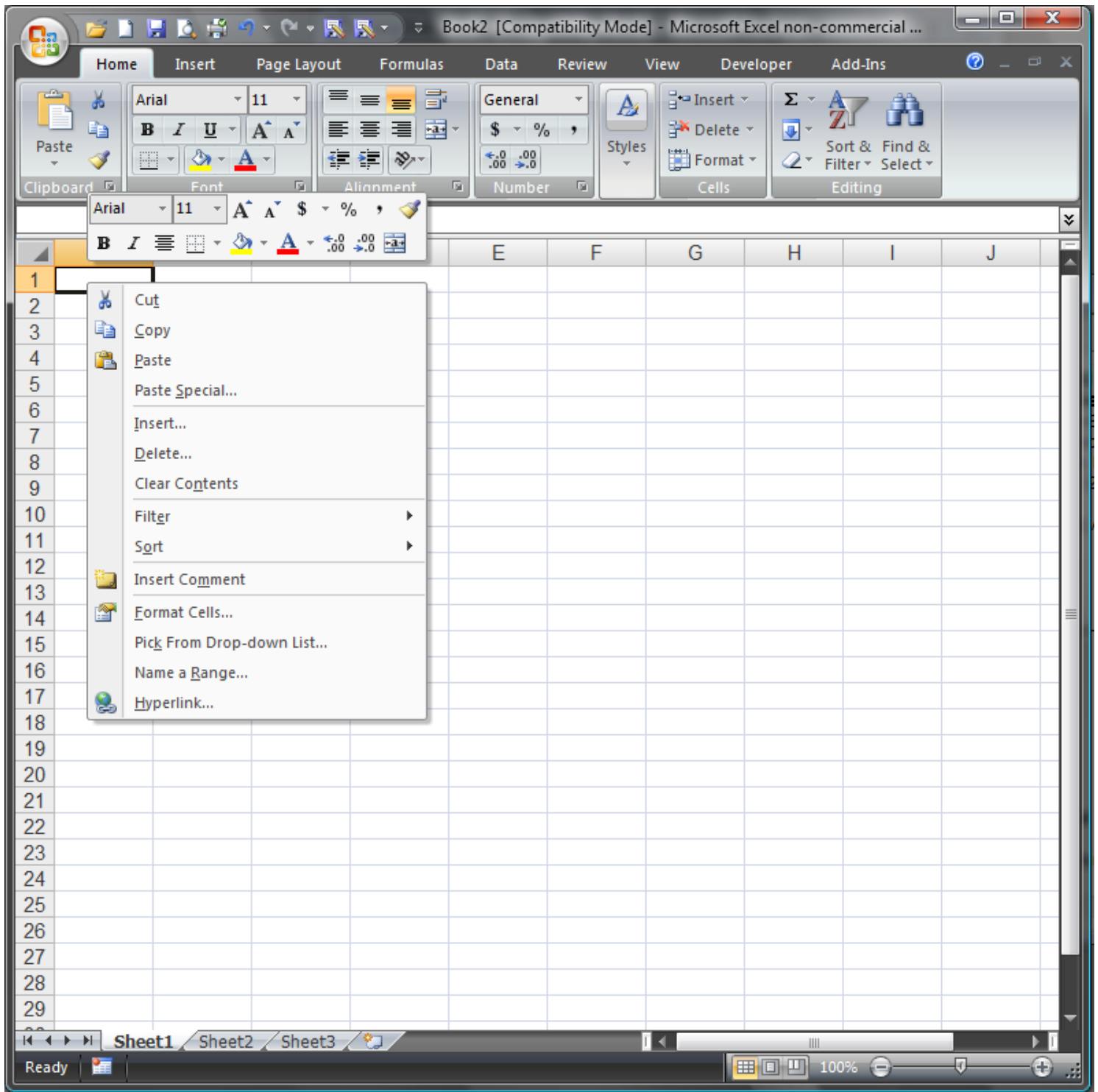


The screenshot shows a window titled "Giving Detail" with a toolbar at the top. The toolbar contains several icons, and the clipboard icon is circled in red with a red arrow pointing to it. The main content area displays a report titled "Giving Detail Composite By Giver" for the Church of God Executive Offices, 2 Winslow Road, Falmouth, ME 04105, covering the offering date from JAN 1 2008 to DEC 31 2009. The report is categorized as "General, All Events".

Giving Fund	Giver	Amount
General	Mr. & Mrs. Ralph Lucas - 118	100.00
	Mike & Susan Disney - 201	1,255.00
	Randy Clay - CLAY63	100.00
	Mr. and Mrs. Jonathan Fields - FIEL47	10.00
	Mr. and Mrs. Rhett Harvey - HARV43	100.00
	Visitor/Non-Mbr gift - ZVISITOR	35.00
	General Total:	1,600.00
	Total All Funds:	1,600.00

Once the report is displayed on the screen, select the Clipboard icon from the toolbar as indicated. This "copies" the report to the clipboard.

Open Microsoft Excel and paste



Open a new Microsoft Excel workbook or an existing workbook that you want to paste this report into.

Highlight the workbook cell that you wish to paste into and either -

- right-click and select PASTE
- click the Paste tool from the ribbon bar or Edit menu
- or press <Ctrl><V> for Windows or <Apple><V> for Mac

Select area to sort in Microsoft Excel

The screenshot shows Microsoft Excel with the Data ribbon selected. A table of contributor data is visible, with a red box highlighting the data range from row 17 to 22. The Sort dialog box is open, showing the 'Sort by' dropdown set to 'Column C' and the 'Order' dropdown set to 'Largest to Smallest'. Three yellow circles with numbers 1, 2, and 3 are overlaid on the image to indicate key steps: 1 points to the data range, 2 points to the 'Sort by' dropdown, and 3 points to the 'Order' dropdown.

	A	B	C	D	E	F	G
1	Produced on AUG 31 2009 at 11:09 AM by Administrator						
2							
3	Giving Detail						
4	Composite By Giver						
5							
6	Church of God Executive Offices						
7	2 Winslow Road						
8	Falmouth, ME 04105						
9	Offering Date JAN 1 2008 to DEC 31 2009						
10							
11	General, All Events						
12							
13							
14							
15	Giving Fun Giver		Amount				
16	General						
17	Mr. & Mrs. Ralph Lucas - 118		100				
18	Mike & Susan Disney - 201		1255				
19	Randy Clay - CLAY63		100				
20	Mr. and Mrs. Jonathan Fields - FIEL47		10				
21	Mr. and Mrs. Rhett Harvey - HARV43		100				
22	Visitor/Non-Mbr gift - ZVISITOR		35				
23							
24	General Total:		1600				
25							
26	Total All Funds:		1600				
27							

Sort dialog box settings:

- Sort by: Column C
- Sort On: Values
- Order: Largest to Smallest

Once in Microsoft Excel, you may manipulate the report data in any number of ways. In the example displayed, we want to sort the list of contributors from highest to lowest.

1. Select the cells that you wish to sort. In this case we have selected cells B17 through C22.
2. Open the Sort command in Excel, select the column(s) to sort by. In this case we are sorting by Column C
3. Select the Sort Order. In this case we are sorting Column C from Largest to Smallest.

Final Results

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	Produced on AUG 31 2009 at 11:09 AM by Administrator						
2							
3	Giving Detail						
4	Composite By Giver						
5							
6	Church of God Executive Offices						
7	2 Winslow Road						
8	Falmouth, ME 04105						
9	Offering Date JAN 1 2008 to DEC 31 2009						
10							
11	General, All Events						
12							
13							
14							
15	Giving Fun	Giver	Amount				
16	General						
17		Mike & Susan Disney - 201	1255				
18		Mr. & Mrs. Ralph Lucas - 118	100				
19		Randy Clay - CLAY63	100				
20		Mr. and Mrs. Rhett Harvey - HARV43	100				
21		Visitor/Non-Mbr gift - ZVISITOR	35				
22		Mr. and Mrs. Jonathan Fields - FIEL47	10				
23							
24		General Total:	1600				
25							
26		Total All Funds:	1600				
27							
28							
29							

The final result is our Giving Detail Report sorted from highest contributor to lowest contributor.