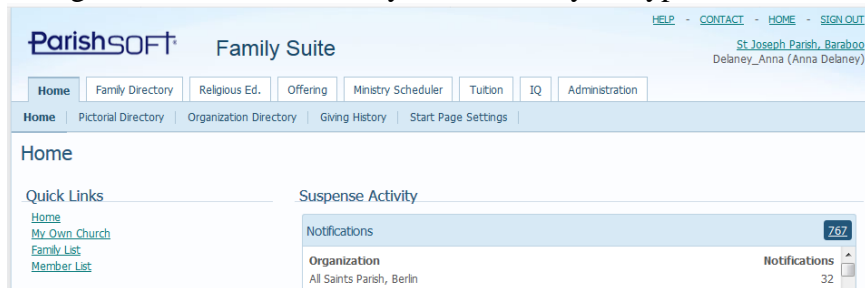
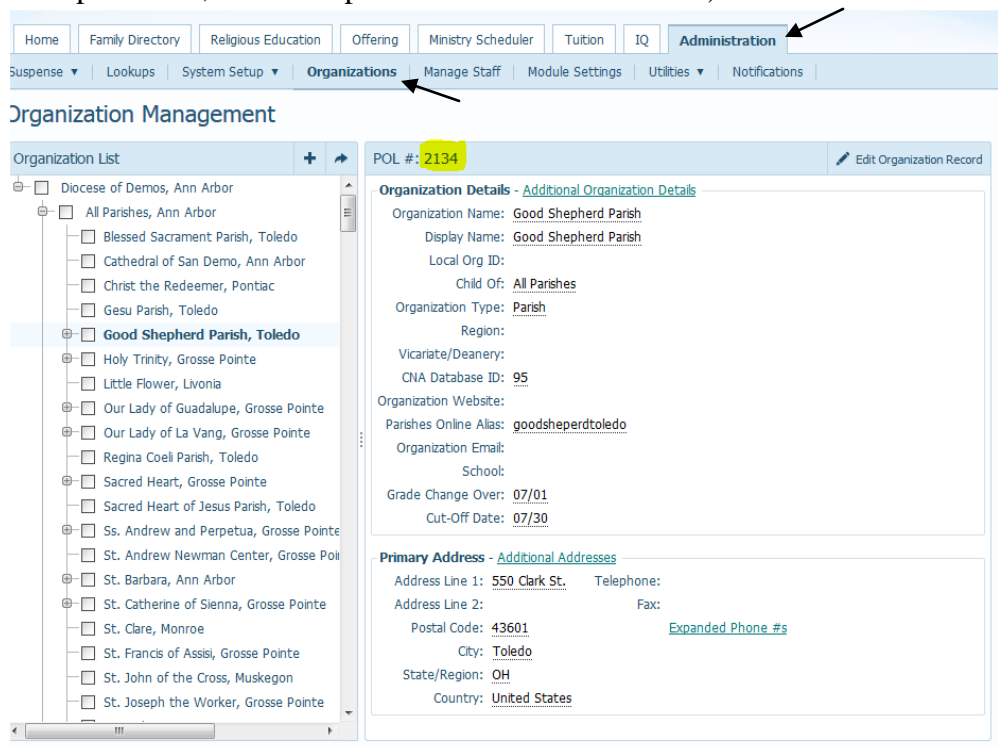


Families giving by date range for analysis from IQ

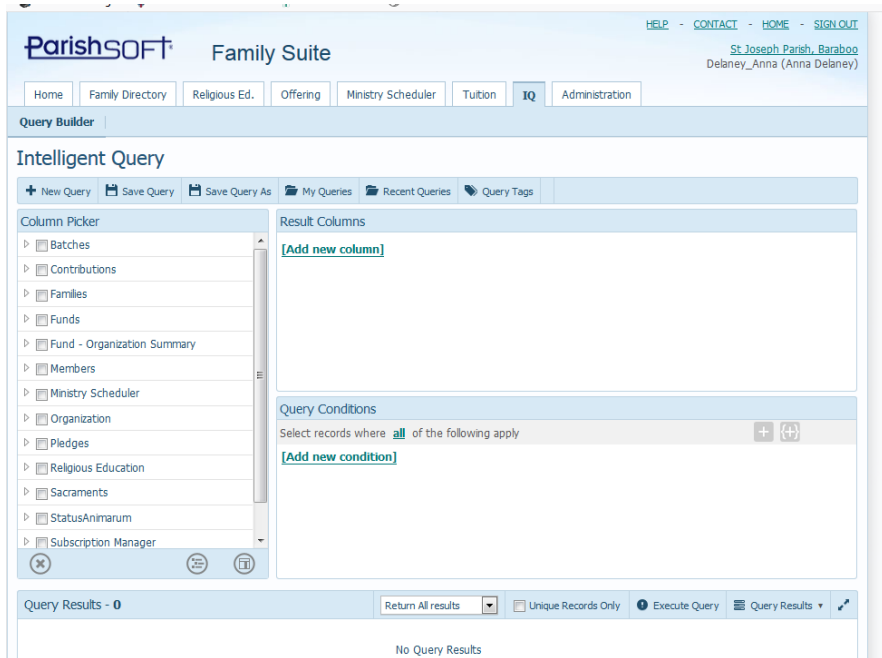
1. First, log into **ParishSOFT** and you will be at your typical home screen:



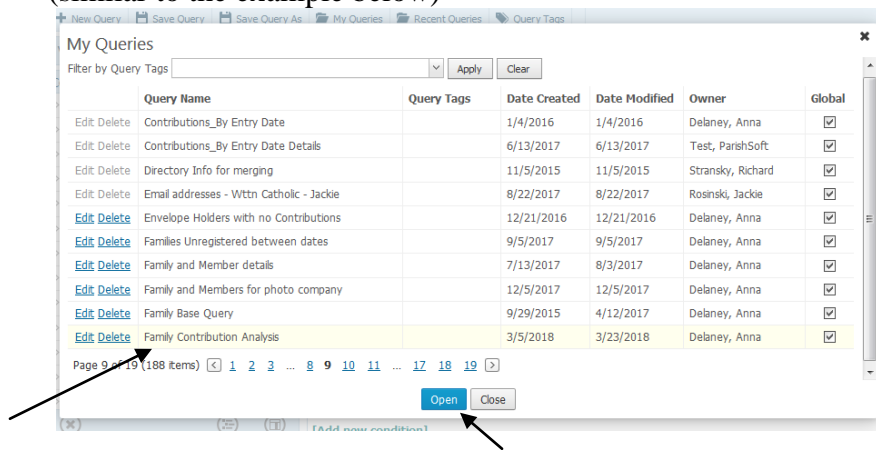
2. First, in order to run a query on a fund in your system you will need your Organization ID along with the fund that you want to search for. To find the Organization ID, go to the **Administration** tab, as seen below, then click on the **Organizations** area. Next, in the middle of the screen, write down the POL# highlighted below, which in your screen, is your Organization ID number. (In the example below, Good Shepherd Parish is POL # 2134.)



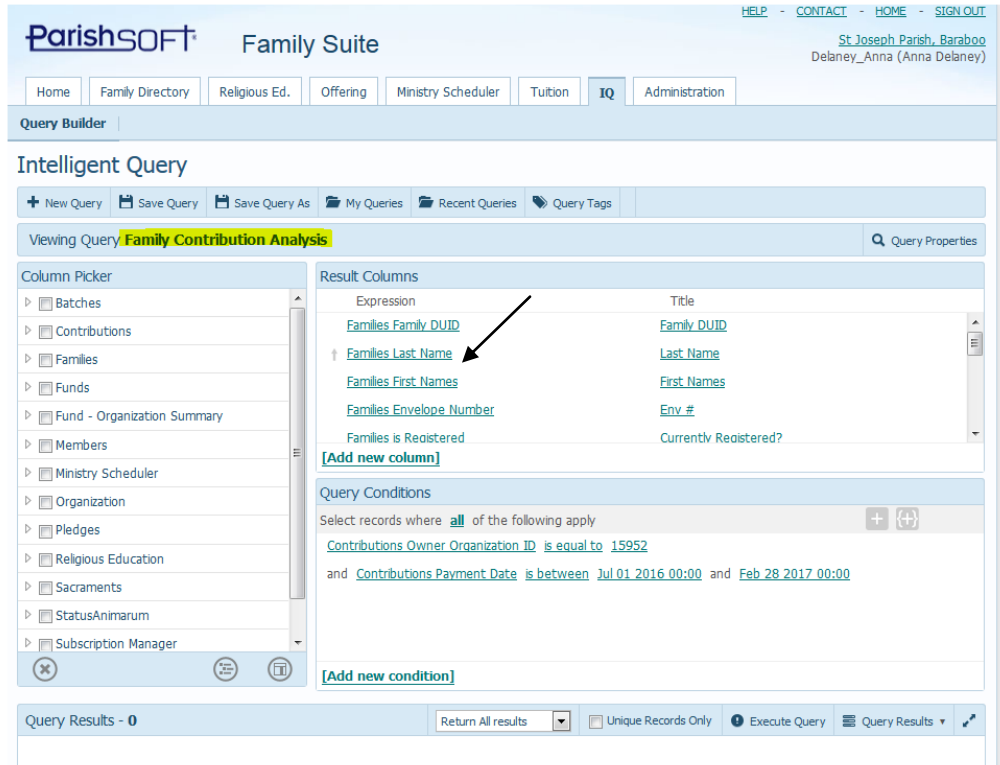
3. Next, we'll go search in IQ and run our query. Click on **IQ** tab and you will be in the main screen where you can open existing and create new queries. You may see the screen filling, wait a second or two and it should appear as seen below:



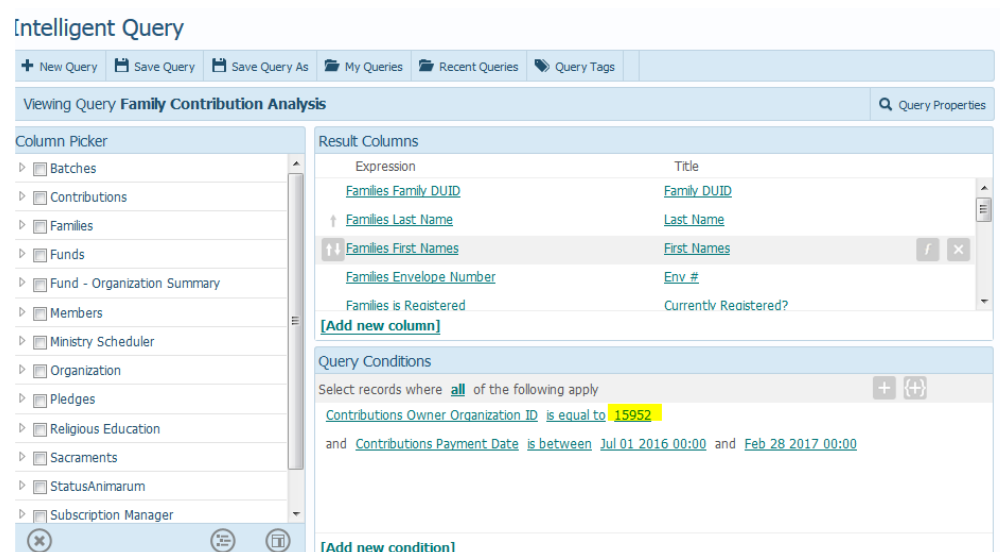
- Click the **My Queries** area, seen above and search for the query called: **Family Contribution Analysis** query. Click on the area where the name of the query is shown, to highlight it, then click the **Open** button at the bottom of the screen. (similar to the example below)



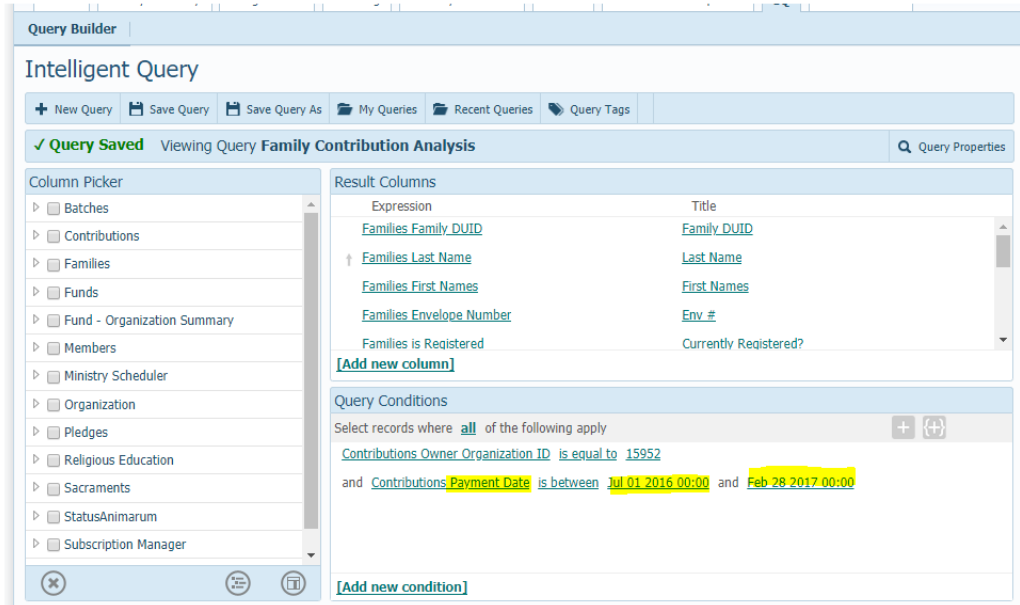
- You will see the query fill in the main area, similar to below. You can see the name of the query, highlighted in the screen shot below, in case you want to verify what query was opened.



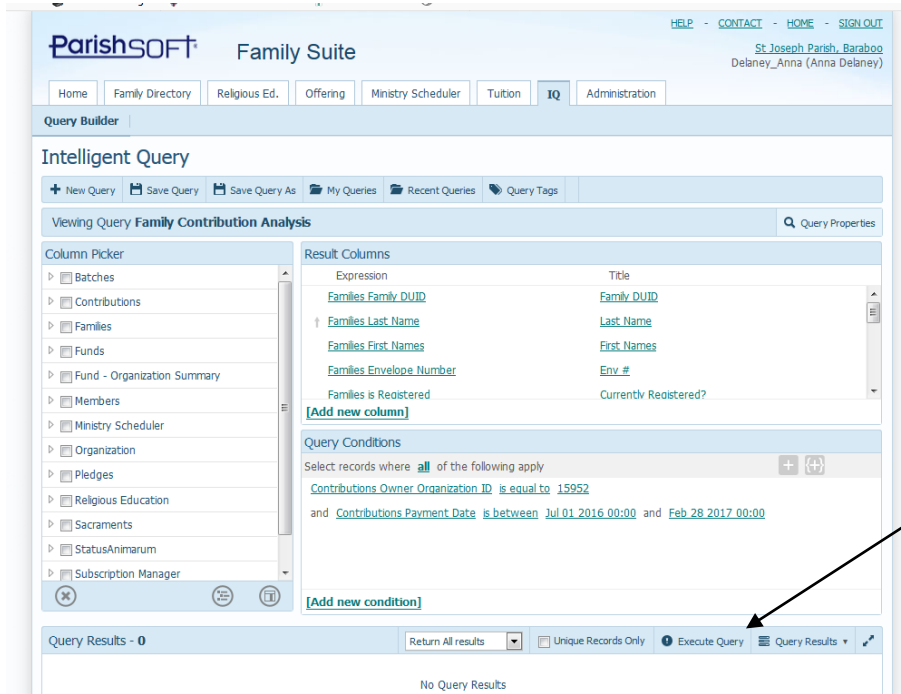
- In the **Query Conditions** area, indicated below, click in the area to the right of Contributions Owner Organization ID, and fill in your parish's Organization ID. Click outside the box or press Enter to change your edited text back to the blue of the other criteria.



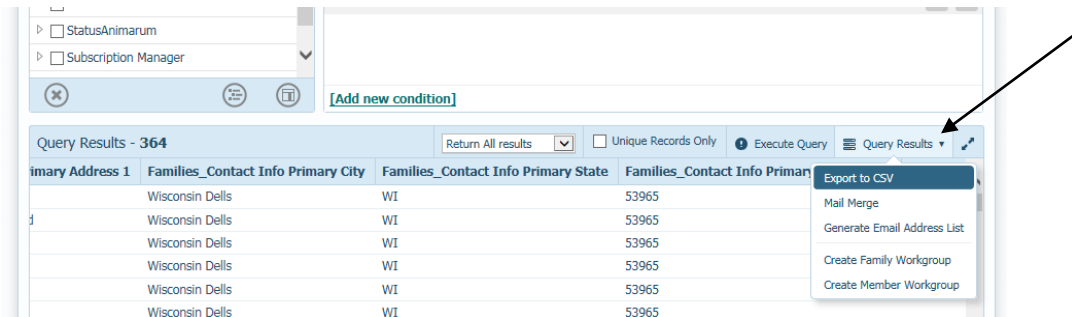
- After editing the Organization ID, look to where the date range parameters are. Click where the dates are shown highlighted below, and change them to the date range you wish to analyze.



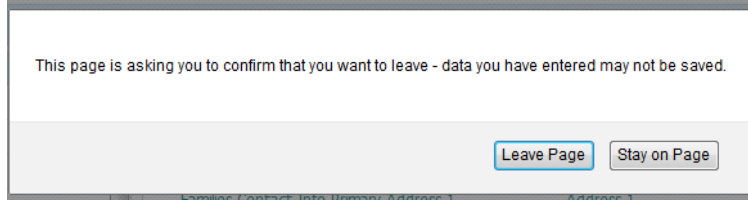
- Click the **Execute Query** area, on the bottom right side, as seen in the screen shot below.



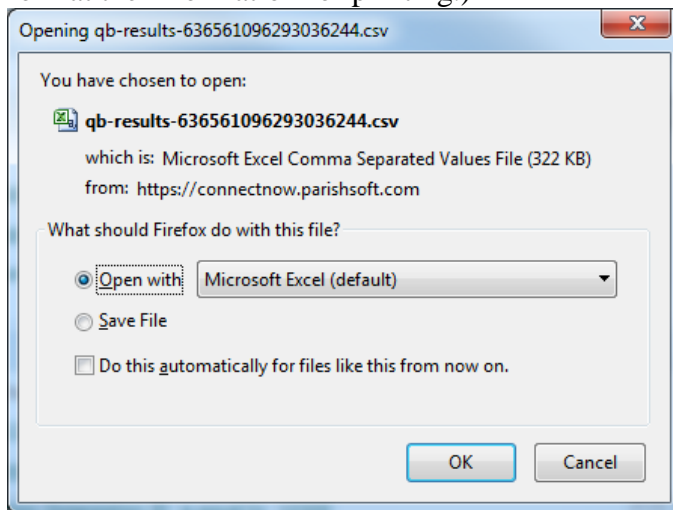
- After running the query, to export the information and save it, click on the **Query Results** area seen below, then select **Export to CSV**



10. Your web browser may give you a warning, it's OK to click and **Leave this page**.



11. Next, your computer will request what you want to do with the file, as seen in the image below. Go ahead and click to **Open the file in Microsoft Excel**. (where we will format the information for printing.)

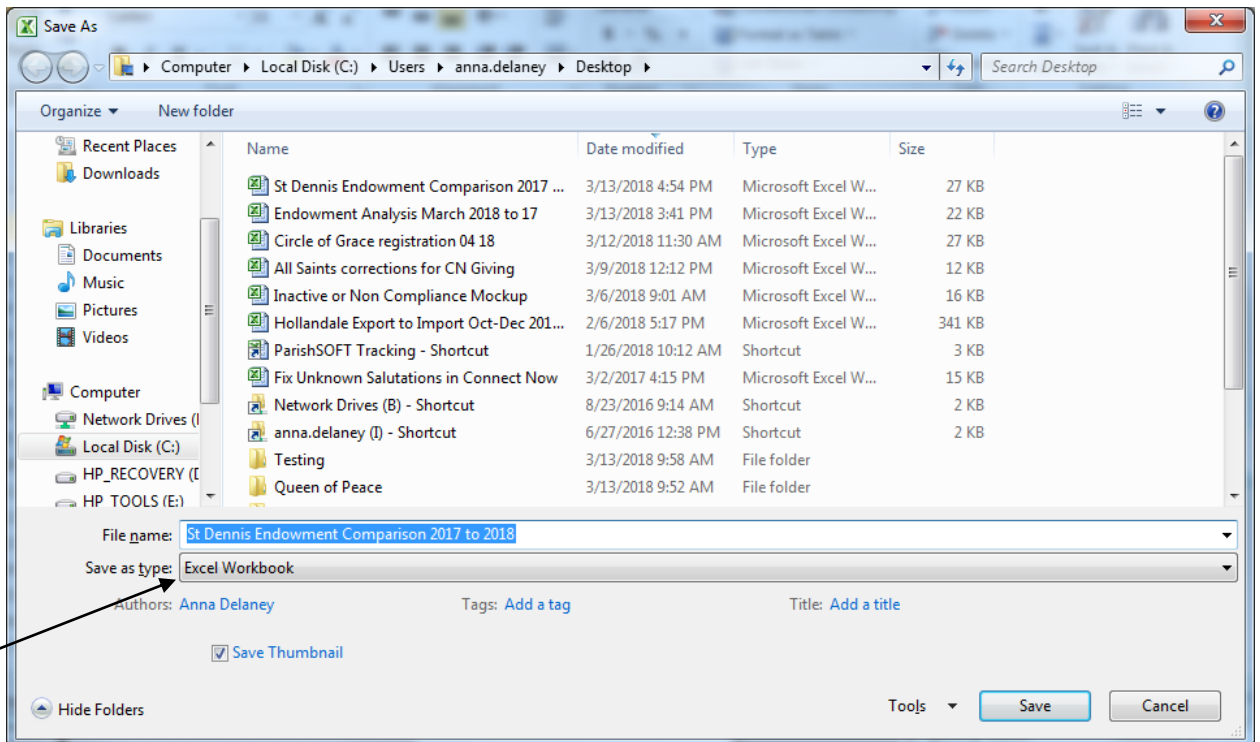


12. The file should now open in MS Excel (or your default program) similar to the screen below:

qb-results-636561228629571515 [Read-Only] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Families I	Families F	Address 1	City	State	Zip	Phone	Emergenc	Emergency	Phone	Desc						
2	Aalfey	Dean and	815 Camp	Middleto	WI	53562	608-123-4567										
3	Aaron	George	S1556A In	Middleto	WI	53562	608-123-4567										
4	Acker	Jean	600 Astec	Middleto	WI	53562	608-123-4-477-1558	cell 1/2017									
5	Adams	Paul and I	E12628A I	Middleto	WI	53562	608-123-4567										
6	Anderson	Michelle	800 Waldc	Middleto	WI	53562	608-123-4567										
7	Ayer	David and	E10164 Te	Middleto	WI	53562	608-123-4567										
8	Bonham	Mary	1352 15th	Middleto	WI	53562	608-123-4567										
9	Borkenha	Gary and I	209 Washi	Middleto	WI	53562	608-123-4567										
10	Bowar	David and	202 15th A	Middleto	WI	53562	608-123-4-608-393-1088										
11	Bowens	Edwin anc	621 13th S	Middleto	WI	53562	608-123-4567										
12	Bowens	Alicia	800 Waldc	Middleto	WI	53562	608-123-4567										
13	Bowers	James anc	E12109A S	Middleto	WI	53562	608-123-4-393-1081	might be giving tree number									
14	Boyd	Owen anc	727 Jacqu	Middleto	WI	53562	608-123-4567										
15	Boyd	Bruce	321 4th A	Middleto	WI	53562	608-123-4567										
16	Brennan	Brian and	E11673 M	Middleto	WI	53562	608-123-4567										
17	Brennan	Anthony z	E9751 Sta	Middleto	WI	53562	608-123-4567										
18	Brennan	Colleen	326 5th A	Middleto	WI	53562	608-123-4567										
19	Brennan	David and	901 Moor	Middleto	WI	53562	608-123-4567										
20	Bronkalla	Leo and Jc	E9899 Troj	Middleto	WI	53562	608-123-4567										
21	Brophy	Joan	818 Duboi	Middleto	WI	53562	608-123-4567										

13. Click **File** then **Save As** to save the file. Make sure, to save it in a location you know, with a name that makes sense. If you want to format this document and keep the formatting, then click the **Save As Type** (indicated below) and select **Excel Workbook**. (top option in the list) Then click **Save**.



- If you wish to compare two date ranges, you will go back into **Connect Now IQ**. Then change the date range for the second analysis dates, click **Execute Query**, to see the results of the Query, save out the data again and merge both data files to one Excel worksheet.

Intelligent Query

Viewing Query **Contribution Fund by Dates and Number times given** Query Properties

Column Picker

- Batches
- Contributions
- Families
- Funds
- Fund - Organization Summary
- Members
- Ministry Scheduler
- Organization
- Pledges
- Religious Education
- Sacraments
- StatusAnimarum
- Subscription Manager

Result Columns

Expression	Title
Families Family DUID	Family DUID
Families First Names	Families First Names
Families Last Name	Last Name
Families Mailing Name	Families Mailing Name
Families.Contact Info Primary Address 1	Address 1

[\[Add new column\]](#)

Query Conditions

Select records where **all** of the following apply

[Contributions Payment Date](#) is between **Feb 27 2016 00:00** and **Feb 28 2017 00:00**

and [Contributions Fund DUID](#) is equal to **16169**

and [Contributions Payment Amount](#) is greater than **0**

and [Families.Owner Organization Organization ID](#) is equal to **3309**

[\[Add new condition\]](#)

Query Results - **128** Return All results Unique Records Only Query Results

Family DUID	Families First Names	Last Name	Families Mailing Name	Address 1	Address 2
118026	Scholarstica	Aniekwenagbu	Scholarstica Aniekwenagbu	15 Straubel Ct Apt 302	