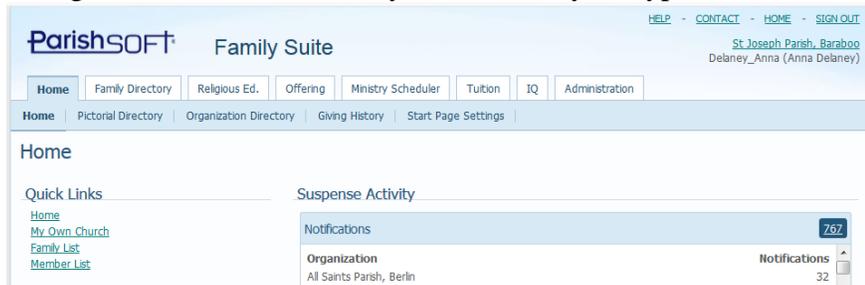


Multiple fund giving for one date range and NOT the other from IQ

1. First, log into **ConnectNow** and you will be at your typical homescreen:

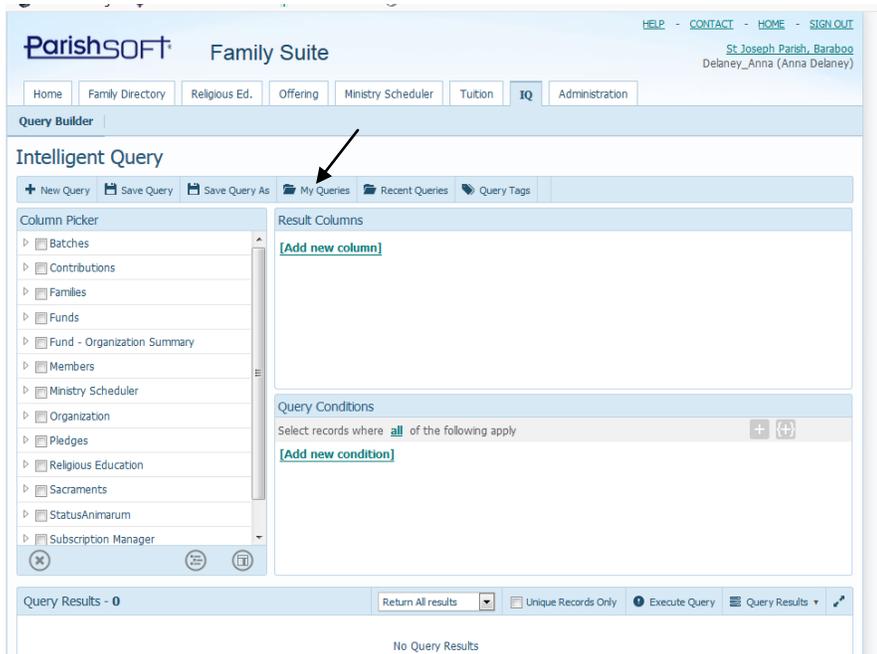


2. First, we will need to look up the fund #'s for our query, which we will find by going to the Offertory Funds area, and searching for the funds you need. In the example below, where the parish is reporting on their different school funds, we'll write down the numbers in the Fund ID column, as seen below.

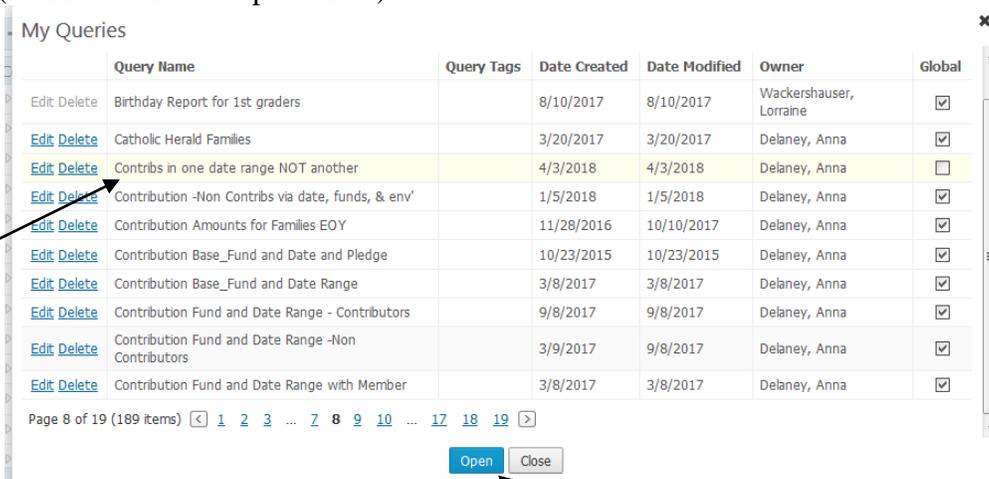
Fund Management

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
46710	AE -Adult Education Income	14324	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
46740	AE -Collections/Donations	14336	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
46720	AE -Religious Ed Fees	14334	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
46730	AE -Transportation Fees	14335	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40203	All Saints Day Contrib	14358	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24711	Altar Care	14364	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
47540	Altar Society	14330	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
44001	Annual Fund - McMorran Tuition Assistance	14353	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
48130-01	Annual Fund - School Curriculum enhancements	15250	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40150	Annual Fund - Where the School Need is Greatest	14305	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14305

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: **Contribs in one date range NOT another** 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.

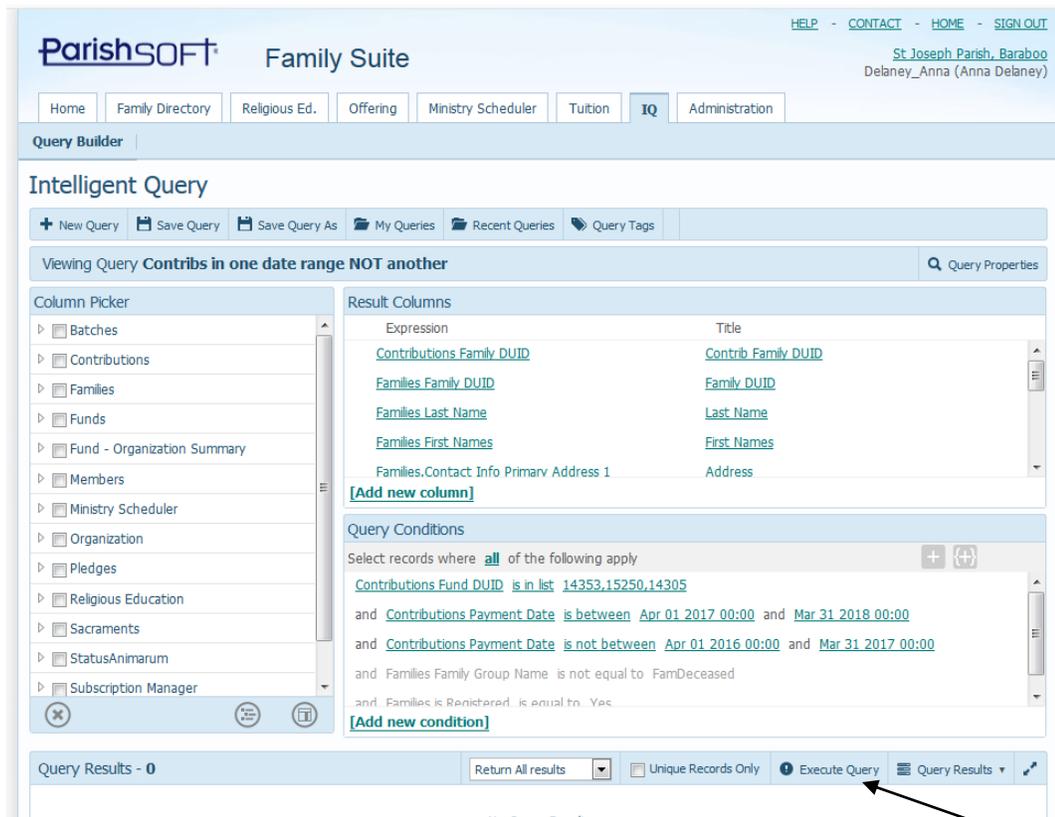
The screenshot shows the 'Intelligent Query' interface. At the top, there are navigation buttons: '+ New Query', 'Save Query', 'Save Query As', 'My Queries', 'Recent Queries', and 'Query Tags'. Below this is a search bar for 'Viewing Query' with the text 'Contribs in one date range NOT another' and a 'Query Properties' link. The main area is divided into three sections: 'Column Picker' on the left, 'Result Columns' in the middle, and 'Query Conditions' at the bottom. The 'Query Conditions' section contains the following text: 'Select records where all of the following apply', followed by four conditions: 'Contributions Fund DUID is in list 14353,15250,14305', 'Contributions Payment Date is between Apr 01 2017 00:00 and Mar 31 2018 00:00', 'Contributions Payment Date is not between Apr 01 2016 00:00 and Mar 31 2017 00:00', and 'Families Family Group Name is not equal to FamDeceased'. There is an 'Add new condition' link at the bottom of the conditions list. The bottom of the interface shows 'Query Results - 0', a dropdown menu set to 'Return All results', a checkbox for 'Unique Records Only', and buttons for 'Execute Query' and 'Query Results'.

- In the **Query Conditions** area, indicated below, click the area to the right of the first query conditions and enter in the number of Fund ID's you wish to report on, separated by a comma. In the query below, we're reporting on Fund ID# 14353, 15250, and 14305.

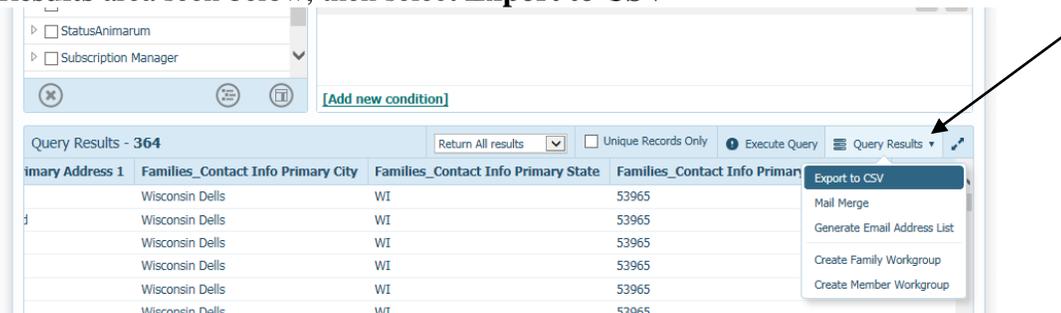
Also, you will want to click where you see the payment dates and fill in the dates you wish to see the contribution amount on, under the "Contribution Payment Date is Between..." and the contribution payment date for which people haven't given under the "Contribution Payment Date is not between" as the other date range.

This is a close-up view of the 'Query Conditions' section from the previous screenshot. It shows the text 'Select records where all of the following apply' and the four conditions: 'Contributions Fund DUID is in list 14353,15250,14305', 'Contributions Payment Date is between Apr 01 2017 00:00 and Mar 31 2018 00:00', 'Contributions Payment Date is not between Apr 01 2016 00:00 and Mar 31 2017 00:00', and 'Families Family Group Name is not equal to FamDeceased'. The first condition is highlighted with a blue selection bar. There is an 'Add new condition' link at the bottom of the conditions list. The bottom of the interface shows 'Return All results', 'Unique Records Only', 'Execute Query', and 'Query Results' buttons.

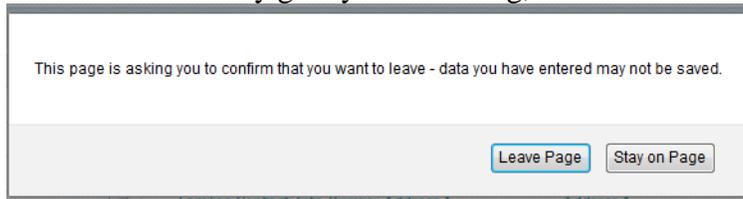
- To see the results of families that fit this criteria, click the **Execute Query** area, on the bottom right side, as seen in the screen shot below.



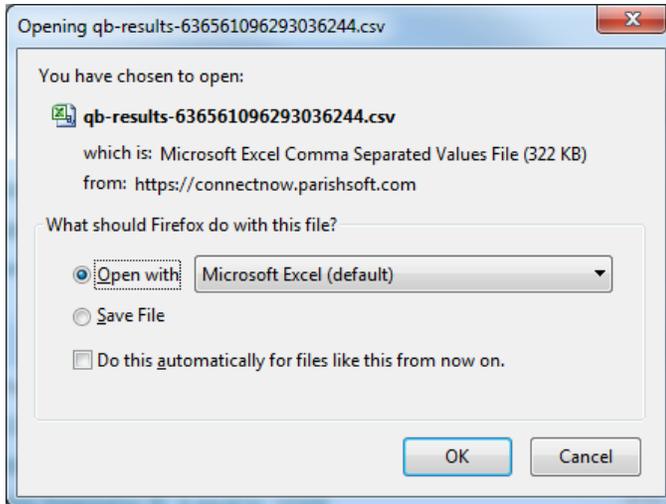
- After running the query, to export the information and save it, click on the **Query Results** area seen below, then select **Export to CSV**



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



- 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.)



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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Families	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	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 Jacqui	Middleto	WI	53562	608-123-4567										
15	Boyd	Bruce	321 4th	Av Middleto	WI	53562	608-123-4567										
16	Brennan	Brian and	E11673	M Middleto	WI	53562	608-123-4567										
17	Brennan	Anthony	E9751	Stat Middleto	WI	53562	608-123-4567										
18	Brennan	Colleen	326 5th	Av 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										

12. 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**.

