

FAQ: How to Add Grouping to a Report

1. By adding grouping to a report, users can:
 - a. Add section headers, such as pictured below. This list of contacts is grouped by state that each contact lives in;

Contact Name	Address Line 1	City	State	Donation Date	Donation Amount
CA					
Tanner Hirakida	1707 Capistrano Dr	Petaluma	CA	04/07/2016	\$20,000
Tanner Hirakida	1707 Capistrano Dr	Petaluma	CA	09/01/2016	\$100
Tanner Hirakida	1707 Capistrano Dr	Petaluma	CA	09/27/2016	\$1,000
Terri Boat Basin	1300 Valley House Dr Ste 100-39	Robson Park	CA	09/29/2016	\$25
Terri Boat Basin	1300 Valley House Dr Ste 100-39	Robson Park	CA	10/26/2016	\$25
FL					
Bob Smith	3346 Shere Hunt Road	Miami	FL	06/01/2016	\$100
GA					
Mr. Dan Wain	127 whiteford ave	atlanta	GA	06/28/2016	\$50
GJ					
Rasit Karal	A-804 Madhuram Appt		GJ	08/01/2016	\$500
Rasit Karal	A-804 Madhuram Appt		GJ	12/20/2016	\$20
Rasit Karal	A-804 Madhuram Appt		GJ	07/26/2016	\$25
KS					
Terri's Pillars and Posts	524 Brendon Rest	Wichita	KS	09/27/2016	\$55
MA					
Mercedes Cabrera	209 Ferry St	Lawrence	MA	07/26/2016	\$125
Mercedes Cabrera	209 Ferry St	Lawrence	MA	08/18/2016	\$5,000
Mercedes Cabrera	209 Ferry St	Lawrence	MA	01/04/2016	\$217
Mercedes Cabrera	209 Ferry St	Lawrence	MA	02/04/2016	\$217
Mercedes Cabrera	209 Ferry St	Lawrence	MA	03/04/2016	\$217
Mercedes Cabrera	209 Ferry St	Lawrence	MA	04/04/2016	\$217
Mercedes Cabrera	209 Ferry St	Lawrence	MA	05/04/2016	\$217
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	05/05/2016	\$950
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	07/28/2016	\$100
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	12/15/2016	\$75
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	05/05/2016	\$50
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	05/05/2016	\$25
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	09/14/2016	\$75
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	05/05/2016	\$50
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	11/17/2016	\$75
Mr. Adam Normal MD	123 Primrose Lane	Lawrence	MA	11/18/2016	\$75
ME					

- b. Roll up information that appears multiple times on a report so that it only appears once. For example, in the sample report below, the donor names and addresses appear repeated in each line (the first picture). Adding grouping condenses the repeated information to a single line (the second picture);

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Currency USD

120 Search LCW Demo Report 2 (TB)

View All

Search Report

Terri's Demo Report 12_27

Contact Name	Address Line1	City	State	Donation Date	Donation Amount
Atmay Sharma				03/04/2016	\$80
Atmay Sharma				03/04/2016	\$88
Abby Grass				11/12/2016	\$25
Abby Grass				12/12/2016	\$25
Abby Grass				10/10/2016	\$100
Abby Grass				10/25/2016	\$100
Abby Grass				11/30/2016	\$100
Abby Grass				10/11/2016	\$25
Abby Grass				12/30/2016	\$10
Abby Grass				10/27/2016	\$100
Abby Grass				09/19/2016	\$5
Abby Grass				10/04/2016	\$100
Abby Grass				10/20/2016	\$25
Abby Grass				10/19/2016	\$25
Abby Grass				11/07/2016	\$25
Adam Niri				10/04/2016	\$100
Adam Niri				02/10/2016	\$50
Adam Niri				09/28/2016	\$450
Adam Niri				09/28/2016	\$0
Adam Niri				11/21/2016	\$250
Adam Niri				12/31/2016	\$10
Adam Niri				03/04/2016	\$800
Adam Niri				02/10/2016	\$100
Adam Niri				03/05/2016	\$0
Adam Niri				03/04/2016	\$900
Adam Smith				07/19/2016	\$50
Alameda County				07/27/2016	\$1,500
Angela's Cove				02/01/2016	\$50
Asata Shah				12/01/2016	\$100
Asata Shah				10/28/2016	\$100
Asata Shah				11/21/2016	\$250
Ann Anderson				12/13/2016	\$25
Ann Anderson				12/01/2016	\$10

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120 Search LCW Demo Report 2 (TB)

View All

Search Report

Terri's Demo Report 12_27

Contact Name	Address Line1	City	State	Donation Date	Donation Amount
Atmay Sharma					
Abby Grass					
Adam Niri					
Adam Smith					
Alameda County					
Angela's Cove					
Asata Shah					
Ann Anderson					
Annie Bruce					
Applebee Foods Inc.					
Arya Stark					
Bank of America					
Barbara Flowers					
Bary Shari					
Ben Broder					
Bob Hercules					
Bob Plumb					
Boston Foundation					
Capt. Ben Pierce					
Cassie Mountain					
Catelyn Stark					
Cats and Dogs Inc.					
Chase Bank					
Dax Rags					
Delta Airlines					
Deryn Sharp					
Dr. Garry Singh					
Dr. Greg House					
Dr. Jean Plumb MD					
Eric Meyer					
Frank Chalmers					
Gar					
Gary Yoshio Haskuda					

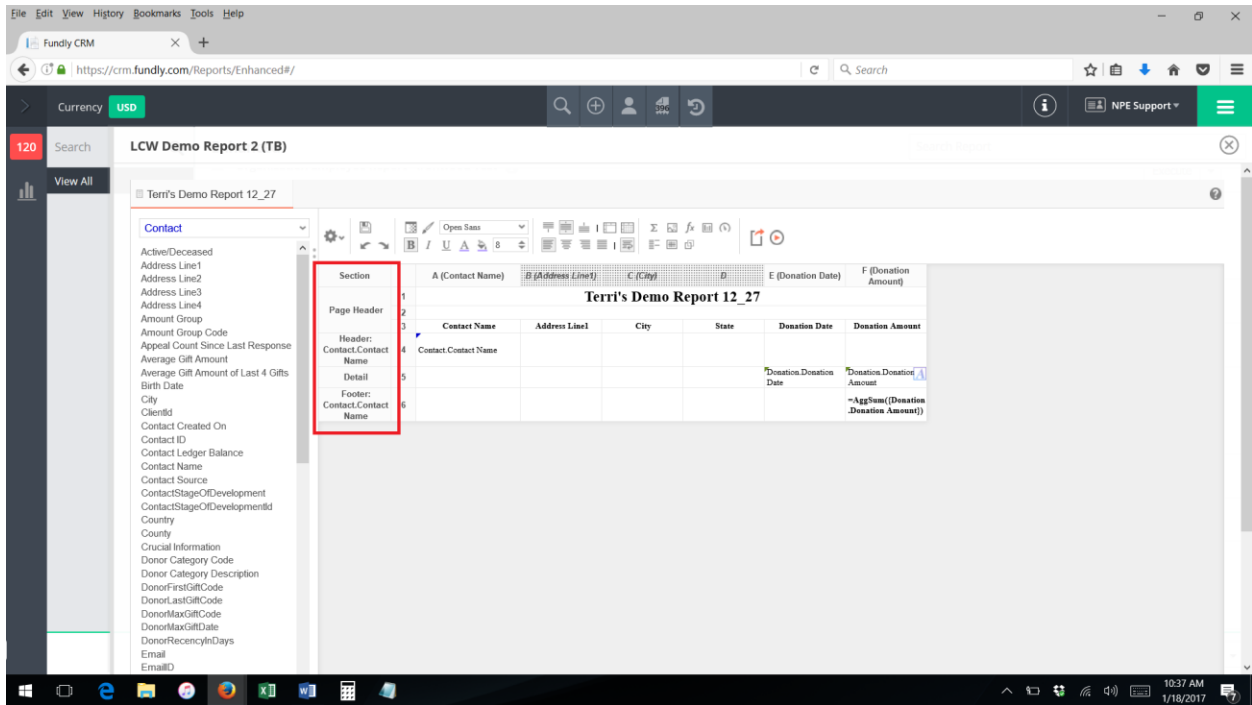
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- c. Add summations to reports, including totals, averages, and counts. In the picture below, each donor's total amount donated is summed up and displayed on the report.

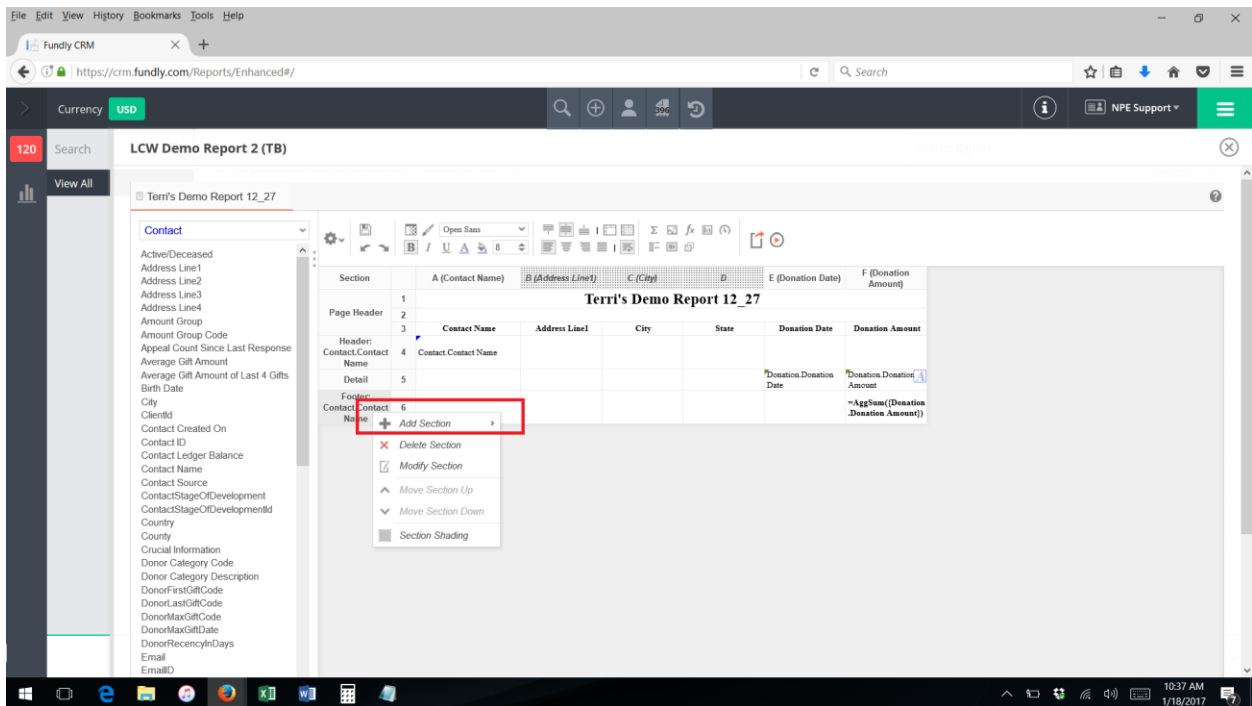
The screenshot shows a web browser window displaying the Fundly CRM interface. The main content is a report titled "Terri's Demo Report 12_27". The report is a table with the following data:

Contact Name	Donation Date	Donation Amount
Ammay Sharma	03-04-2016	\$80
	03-04-2016	\$88
		\$168
Abby Grass	11-11-2016	\$25
	12-12-2016	\$25
	10-10-2016	\$100
	10-25-2016	\$100
	11-30-2016	\$100
	10-11-2016	\$25
	12-30-2016	\$10
	10-27-2016	\$100
	09-19-2016	\$5
	10-04-2016	\$100
	10-20-2016	\$25
	10-19-2016	\$25
	11-07-2016	\$25
		\$665
Adam Niri	10-04-2016	\$100
	02-10-2016	\$50
	09-28-2016	\$450
	09-28-2016	\$0
	11-21-2016	\$250
	12-31-2016	\$10
	03-04-2016	\$100
	02-10-2016	\$100
	03-03-2016	\$0
03-04-2016	\$900	
		\$1,750
Adam Smith	07-19-2016	\$50

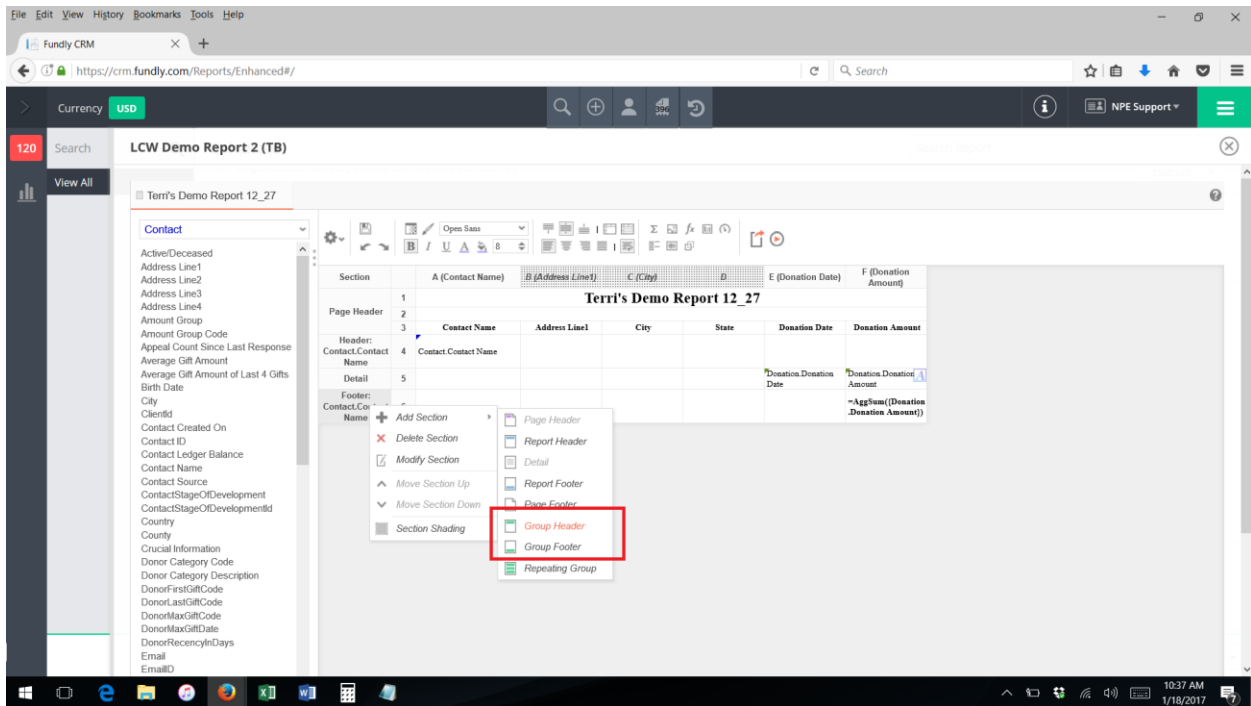
- Users can group on any field—a report can be grouped by contact name, household ID, address, donation date, donation amount, event name, etc. Users can also group based on formulas (for instance, using the “if/then” function in grouping can allow the user to set the report to group by one particular field and then another field in instances of the first field being blank (for instance, group by household ID if the contact is in a household and group by contact ID if the contact is not in a household).
- Please note:** you can only add grouping to a **Standard Report**; grouping cannot be added to Express Reports (if you have an Express Report, you must first convert it to a Standard Report).
- Please also note:** you must first **sort** the report by the field you want to group on. For instance, if you want to group donors by state, you must first the report by state. If you want to group by donation amount, you must first sort by donation amount. If you wish to group by household, you must first sort by household (household ID). Etc.
- To get started, while in “edit report” mode, right click anywhere in the “Section” column (furthest column on the left).



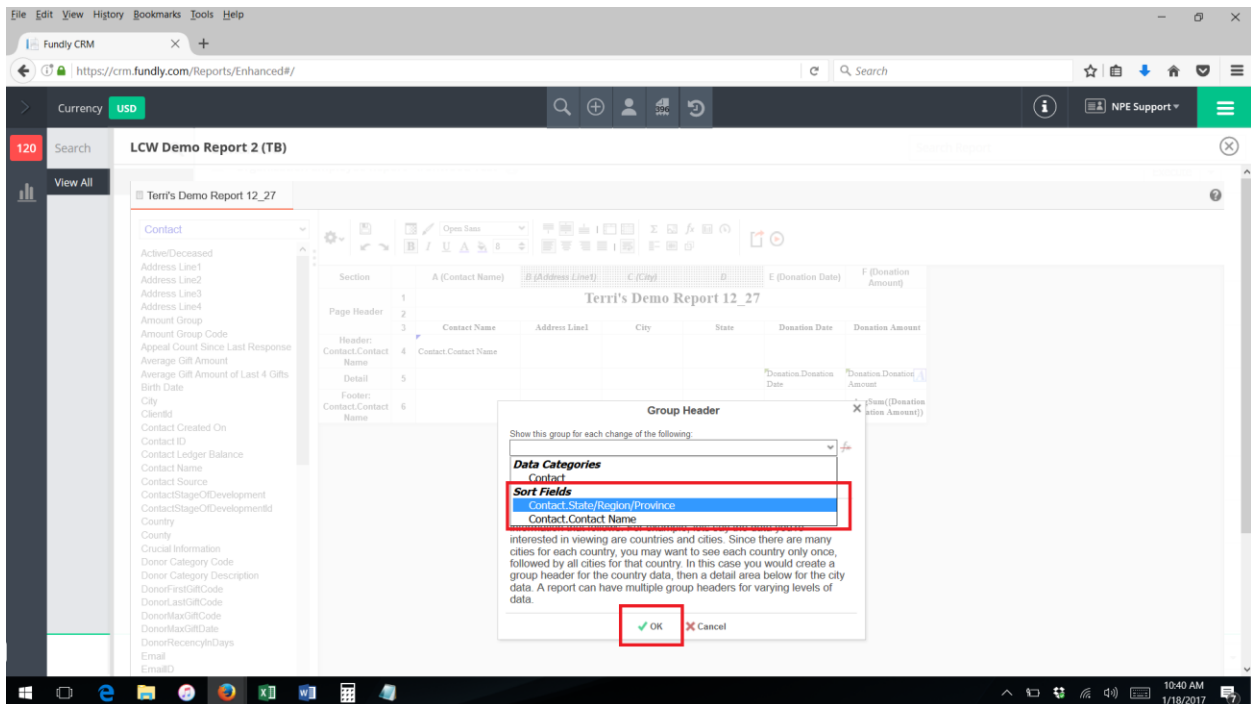
6. Select Add Section from the pop up menu.



7. Select **Group Header** to add information before/at the start of each new group. Select **Group Footer** to add information after/at the end of each new group (**please note**: mathematical functions such as averages, counts, and totals/sums can **ONLY** be placed in a group footer; they cannot be placed in a group header).



8. Select the field you wish to group on from the Sort Categories section of the Group Header/Footer menu. Only those fields you have added to the "sorts" tab of the report will be selectable here. Then click OK.



9. A new row will have been added to your report for your new group header/footer.

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Currency USD

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LCW Demo Report 2 (TB)

View All

Contact

Last Interaction Type

Last Name

Last Name Prefix

Last Updated On

Marital Status

Memorial Date

MergedContactId

Middle Name

Most Common Gift Amount

Next Birth Date

Next Interaction Date

Next Interaction Status

Next Interaction Title

Next Interaction Type

NextAskAmount

Nick Name

NP Contact ID

Number of Employees in the Organiz

Number Of Gifts

Organization Name

Parenting Status

Phone

Phone Call Preference

Phone Country Code

Phone Country Code Numeric

Phone Extension

Plus4Code

Prefix

Recency Group Code

Recency Group Description

Recency In Months

Send Email Preference

Send Mail Preference

State/Region/Province

Suffix

Total Amount

Total Due Amount

Section	A (Contact Name)	B (Address Line1)	C (City)	D	E (Donation Date)	F (Donation Amount)
1	Terri's Demo Report 12_27					
2	Page Header					
3	Contact Name	Address Line1	City	State	Donation Date	Donation Amount
4	Header: Contact.State/Region/Province					
5	Contact Contact Name				Donation Date	Donation Amount
6	Contact.Contact Name					+Agg Sum([Donation Amount])

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10. Drag any fields you want to see in the header to the header row. For instance, in this report, we are sorting our report by State and wish to add a header that displays the State at the start of each new group, so we have added the State field to the header row.

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Fundly CRM

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Currency USD

120 Search

LCW Demo Report 2 (TB)

View All

Terri's Demo Report 12_27

Contact

Last Interaction Type

Last Name

Last Name Prefix

Last Updated On

Marital Status

Memorial Date

MergedContactId

Middle Name

Most Common Gift Amount

Next Birth Date

Next Interaction Date

Next Interaction Status

Next Interaction Title

Next Interaction Type

NextAskAmount

Nick Name

NP Contact ID

Number of Employees in the Organiz

Number Of Gifts

Organization Name

Parenting Status

Phone

Phone Call Preference

Phone Country Code

Phone Country Code Numeric

Phone Extension

Plus4Code

Prefix

Recency Group Code

Recency Group Description

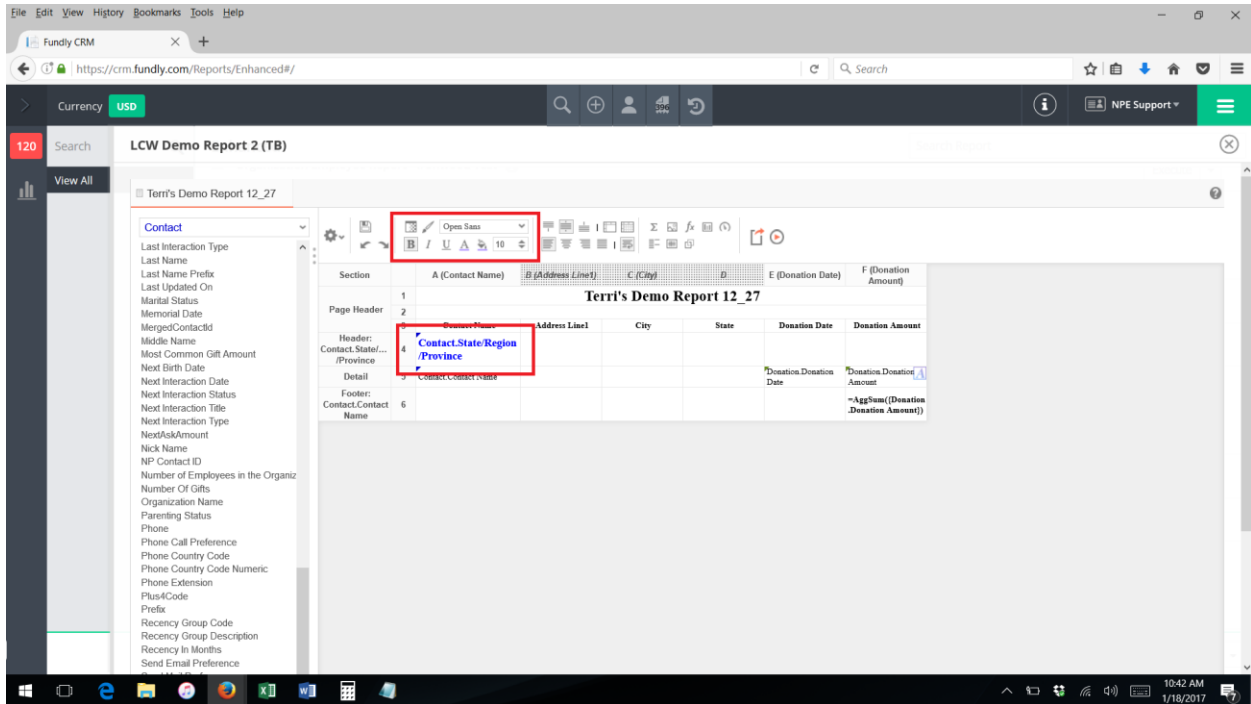
Recency In Months

Send Email Preference

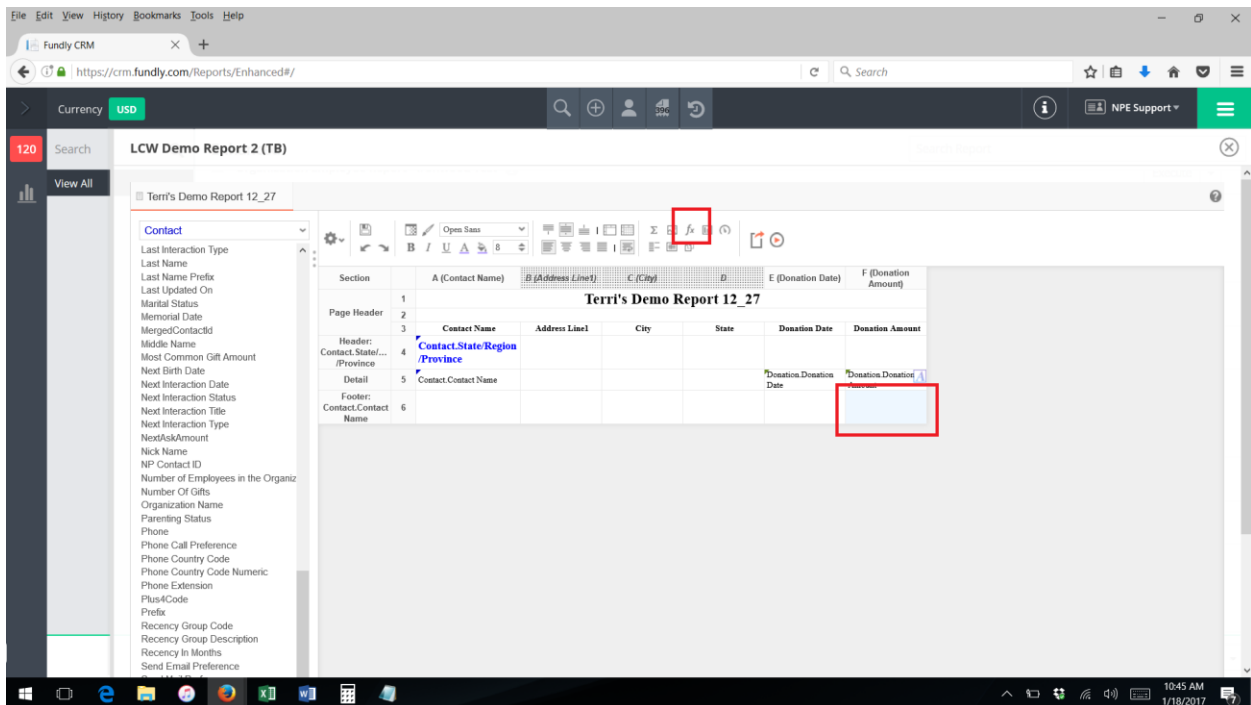
Section	A (Contact Name)	B (Address Line1)	C (City)	D	E (Donation Date)	F (Donation Amount)
1	Terri's Demo Report 12_27					
2	Page Header					
3	Contact Name	Address Line1	City	State	Donation Date	Donation Amount
4	Header: Contact.State Region /Province					
5	Contact Contact Name				Donation Date	Donation Amount
6	Contact.Contact Name					+Agg Sum([Donation Amount])

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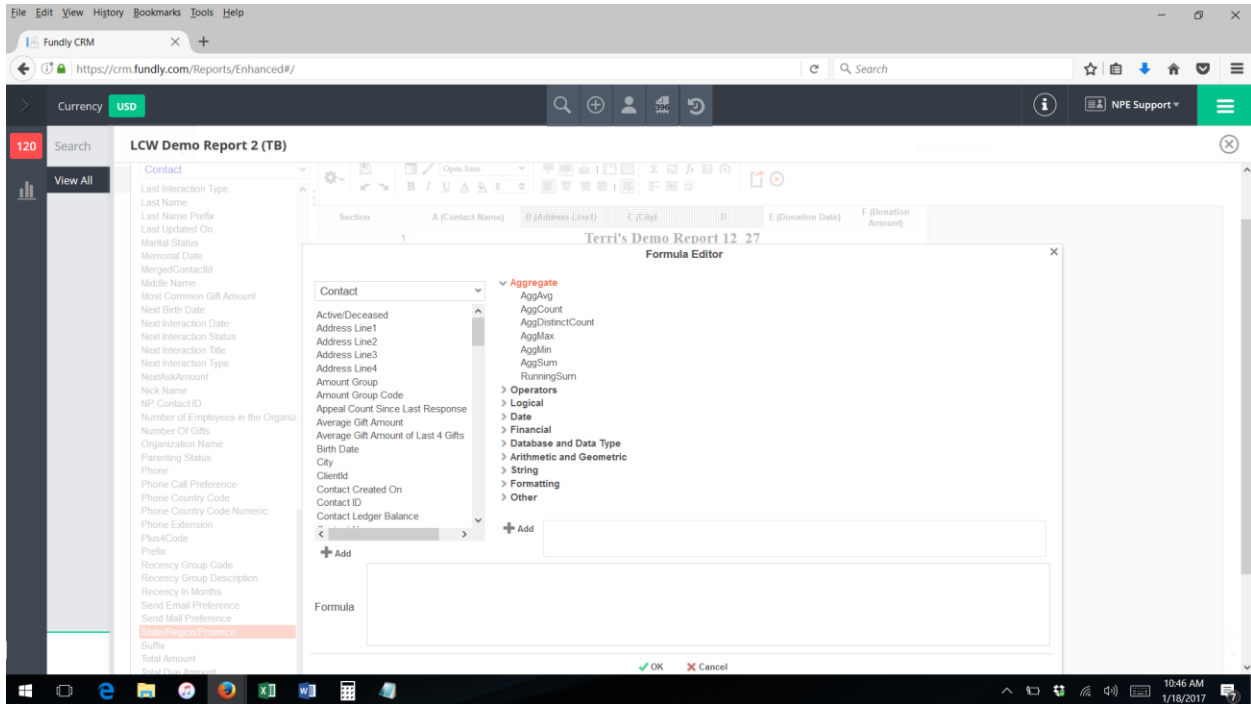
11. To make your headers stand out more, if desired, you can make the font larger or even change the color, using the font tools on the toolbar.



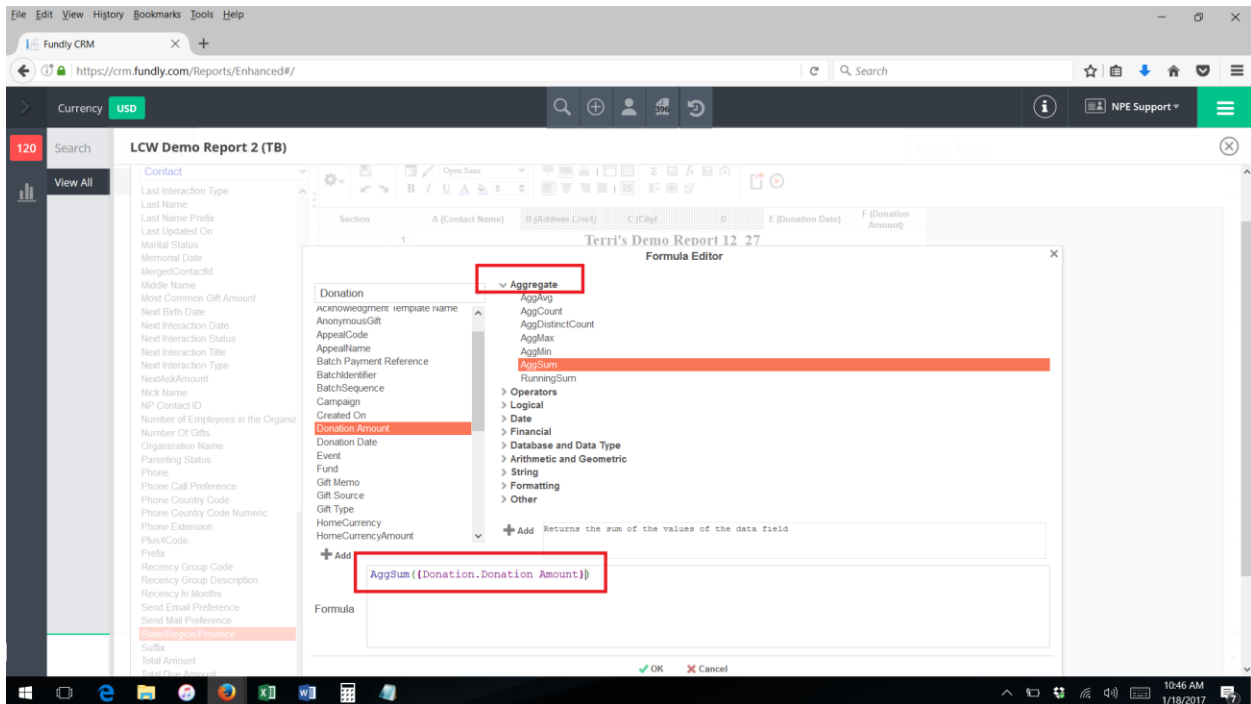
12. If you wish to add totals, averages, or counts to your report, once you have added the group footer to your report, select the cell where you want the summation to appear, then click on the formula/function editor button ("fx") on the toolbar.



13. This will open the Formula Editor screen.



14. Insert the appropriate formula from the Aggregate category (AggSum provides a total, AggAvg provides an average, Agg Count provides a count of the records) and then click OK.



15. You will see the formula for the total/average/count in your footer. Now, when you run the report you will see a total per grouping.

The screenshot shows the report editor interface for 'Terri's Demo Report 12_27'. The table structure is as follows:

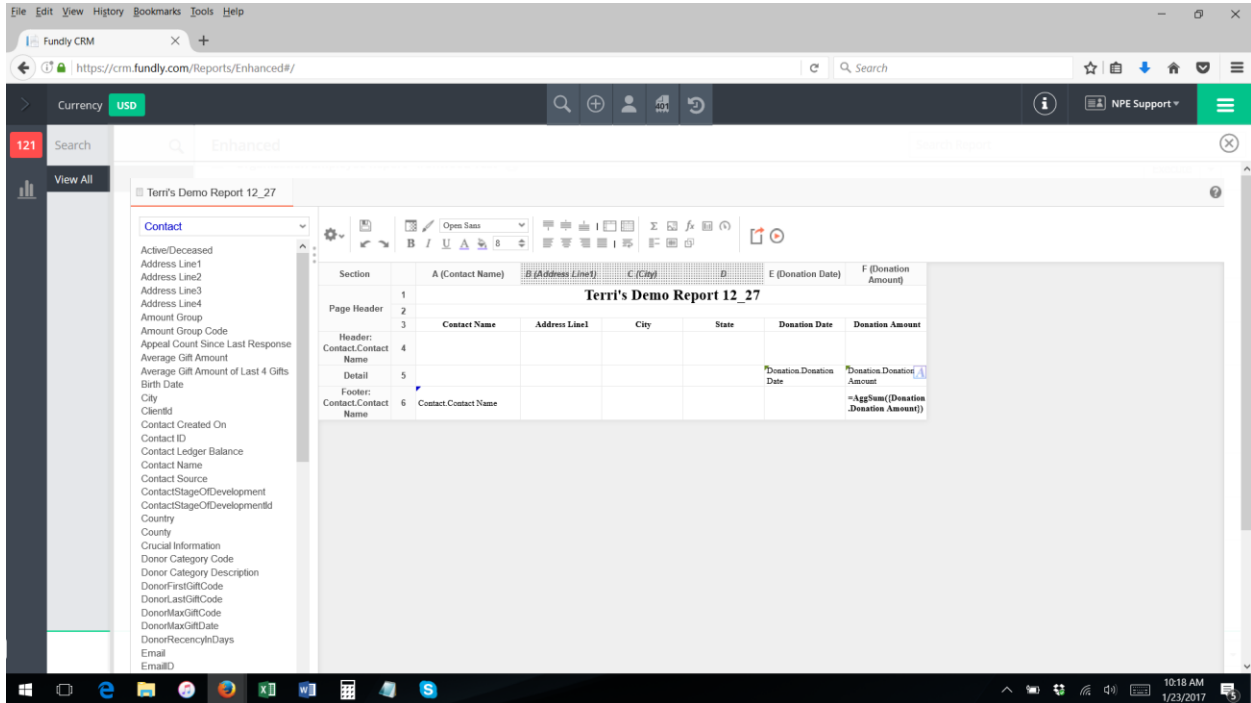
Section	A (Contact Name)	B (Address Line1)	C (City)	D	E (Donation Date)	F (Donation Amount)
1	Terri's Demo Report 12_27					
2	Page Header					
3	Contact Name	Address Line1	City	State	Donation Date	Donation Amount
4	Header: Contact.State/Region /Province					
5	Detail: Contact.Contact Name					
6	Footer: Contact.Contact Name					

The footer cell (row 6, column 7) contains the formula: `=AggSum(Donation .Donation Amount())`, which is highlighted with a red box.

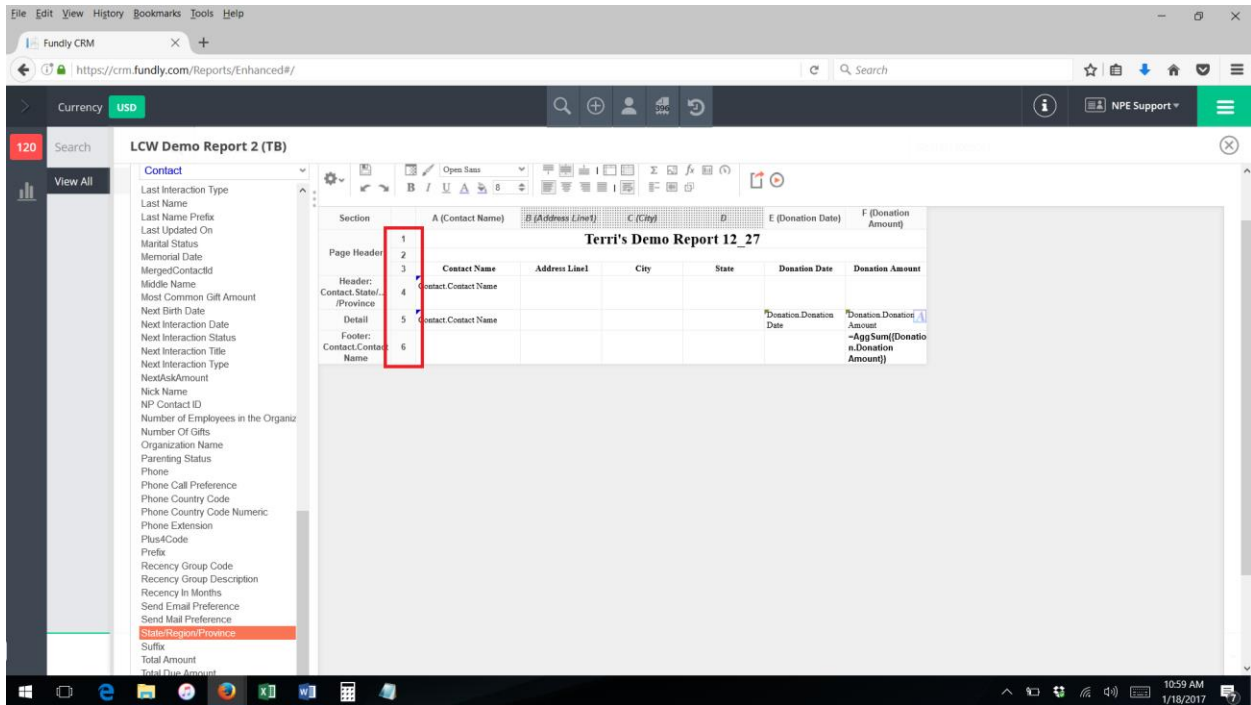
The screenshot shows the final report output for 'Terri's Demo Report 12_27'. The report is a table with columns for Contact Name, Donation Date, and Donation Amount, grouped by contact name.

Contact Name	Donation Date	Donation Amount
Anmay Sharma	03-04-2016	\$80
	03-04-2016	\$88
Abby Grass		\$168
	11-11-2016	\$25
	12-12-2016	\$25
	10-11-2016	\$25
	11-30-2016	\$100
	10-10-2016	\$100
	10-25-2016	\$100
	09-19-2016	\$5
	10-04-2016	\$100
	10-27-2016	\$100
Adam Nir		\$10
		\$25
		\$25
		\$25
		\$25
		\$25
		\$25
		\$25
		\$25
		\$25
Adam Smith		\$665
	09-28-2016	\$0
	09-28-2016	\$450
	02-10-2016	\$50
	11-21-2016	\$250
	10-04-2016	\$100
	12-31-2016	\$10
	03-04-2016	\$100
	02-10-2016	\$100
	03-03-2016	\$0
03-04-2016	\$900	
	\$1,788	
	\$10	

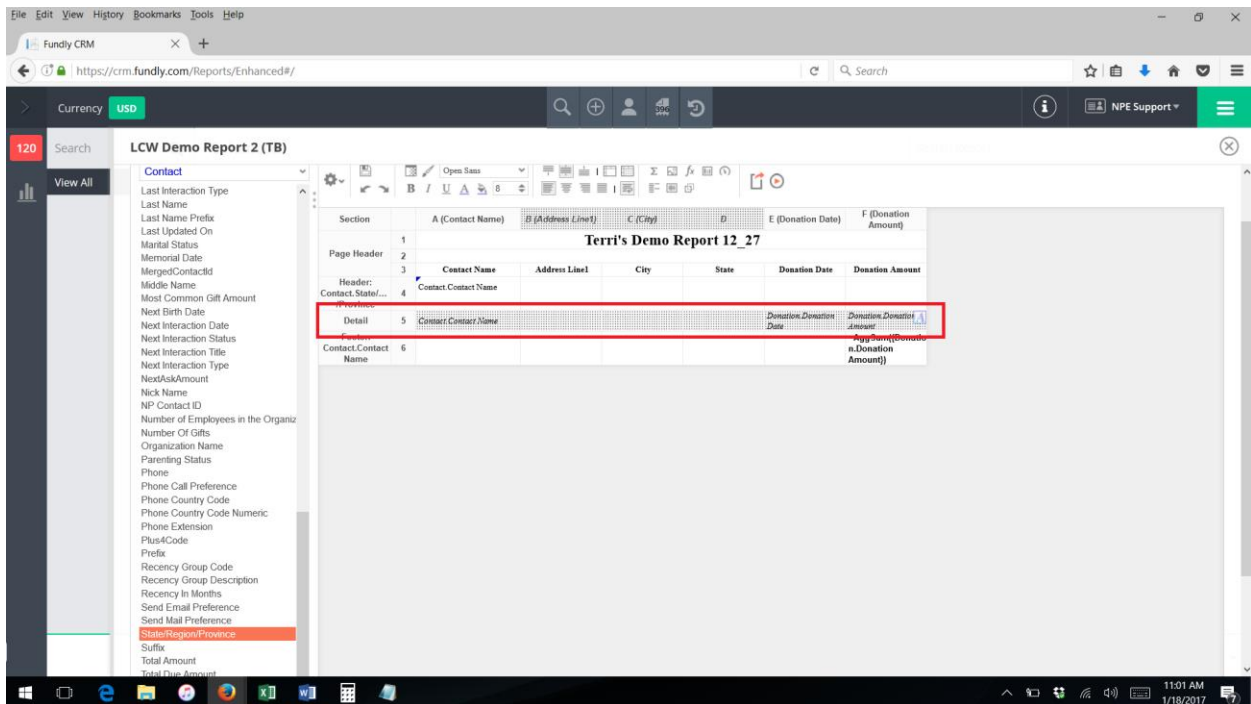
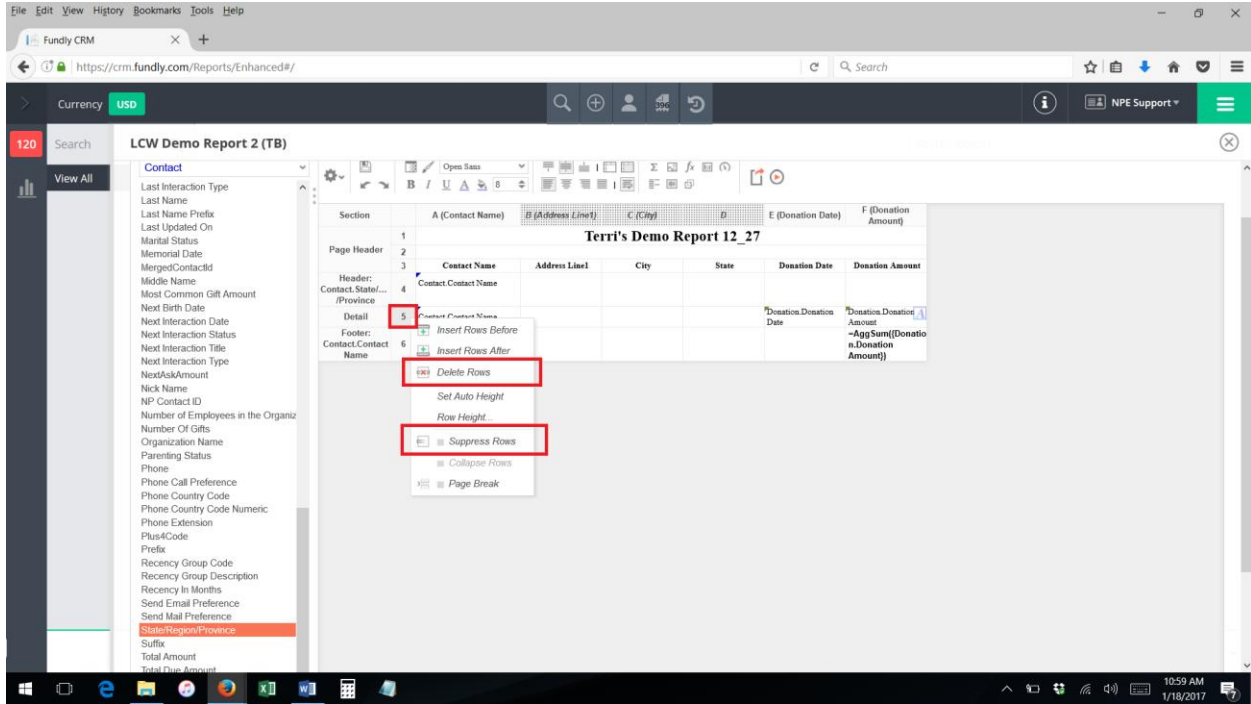
16. To get rid of repeated information on a report, move the information you only want to see once to the group header or footer. For example, here we have moved “Contact Name” to the footer row so that each donor’s name will show on the same line as their donation total amount.



17. Then **delete or suppress (hide)** the Details row. Right click in the Row Number of the row you wish to delete or hide, including group headers or footers that you have added to your report.



18. Then choose Delete Row from the pop-up menu to remove the row/section from your report completing. Choose Suppress Row to hide the row on the executed report (the row will still be visible in edit mode, but will be grayed out).



19. Now when we run the report, only the Group Footer, which contains contact name and donation total amount, shows.

Contact Name	Donation Date	Donation Amount
Anmay Sharma		\$165
Abby Green		\$665
Adam Neri		\$2,750
Adam Smith		\$50
Alameda County		\$1,500
Angel's Cove		\$50
Anita Shah		\$450
Ann Anderson		\$35
Annie Bruce		\$25
Applebee Foods Inc.		\$200
Arya Bank		\$5
Bank of America		\$111
Barbara Flowers		\$25
Barry Shaw		\$10
Ben Broder		\$1,100
Bob Hercules		\$40
Bob Plumb		\$10
Boston Foundation		\$25
Capt. Ben Pierce		\$121
Cause Mountain		\$25
Candya Bank		\$20
Cats and Dogs Inc.		\$12
Chase Bank		\$20
Dan Riggs		\$300
Della Airlines		\$0
Deryn Sharp		\$500
Dr. Garry Singh		\$100
Dr. Greg House		\$1,050
Dr. Jean Plumb MD		\$180
Eric Meyer		\$5
Frank Chalmers		\$1
Gar		\$25
Gary Yoshio Hasekita		\$205

20. Using group headers/footers to suppress duplicates is covered in more detail in our **“Creating a Mailing List Report”** FAQ/tutorial.