

FAQ: How to Group a Report by Household

1. This tutorial will cover how to sort and/or group a report so that members of the same household are listed together.
2. The easiest way to accomplish this is to use the Household ID field from the Household Summary table.
3. On the categories tab, add the Household Summary table to your report.

The screenshot shows the Fundly CRM interface. The left sidebar contains a list of fields under the 'Contact' category. The 'Categories' tab is selected, and a table titled '02 Donor Report' is displayed. The table has the following columns: Contact Name, City, Phone, State/Region/Province, Donation Amount, and Donation Date. The table is currently empty. A red box highlights the 'Categories' tab in the left sidebar.

Contact Name	City	Phone	State/Region/Province	Donation Amount	Donation Date
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File Edit View History Bookmarks Tools Help

Import Fundy CRM Fundy CRM

https://crm.fundy.com/Reports/Enhanced/

Currency USD

126 Search Enhanced

View All

Contact

Active/Deceased
Address Line1
Address Line2
Address Line3
Address Line4
Amount Group
Amount Group Code
Appeal Count Since Last Response
Average Gift Amount
Average Gift Amount of Last 4 Gifts
Birth Date
City
ClientId
Contact Created On
Contact ID
Contact Ledger Balance
Contact Name
Contact Source
ContactStageOfDevelopment
ContactStageOfDevelopmentId
Country
County
Crucial Information
Donor Category Code
Donor Category Description
DonorFirstGiftCode
DonorLastGiftCode
DonorMaxGiftCode
DonorMaxGiftDate
DonorRecencyInDays
Email
EmailID
Employment Status
FamilyId
First Gift Amount
First Gift Date

Section A B (Contact Name) C (City) D (Phone) E (State/Region (Province)) F (Donation Amount) G (Donation Date)

07 Donor Report

Report Categories

Select categories to include on report

Search...

Communication

Contact

Household Summary

Household View

Import Contact Batch

Mailing Address

Newsletter Subscription

Organization

Organization Contact

Other Address

Parent-Child Information

Suppress Duplicates

Category Name

Contact

Donation

OK Cancel

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Currency USD

126 Search Enhanced

View All

Contact

Active/Deceased
Address Line1
Address Line2
Address Line3
Address Line4
Amount Group
Amount Group Code
Appeal Count Since Last Response
Average Gift Amount
Average Gift Amount of Last 4 Gifts
Birth Date
City
ClientId
Contact Created On
Contact ID
Contact Ledger Balance
Contact Name
Contact Source
ContactStageOfDevelopment
ContactStageOfDevelopmentId
Country
County
Crucial Information
Donor Category Code
Donor Category Description
DonorFirstGiftCode
DonorLastGiftCode
DonorMaxGiftCode
DonorMaxGiftDate
DonorRecencyInDays
Email
EmailID
Employment Status
FamilyId
First Gift Amount
First Gift Date

Section A B (Contact Name) C (City) D (Phone) E (State/Region (Province)) F (Donation Amount) G (Donation Date)

02 Donor Report

Report Categories

Select categories to include on report

Search...

Contact Saved Search

Contact with Contact Types

ContactByAppealAmountPremium

ContactFamily

ContactSmartTag

ContactTag

GetContactSpousePartnerView

Household & Summary

Household Summary

Household View

Import Contact Batch

Mailing Address

Newsletter Subscription

Organization

Organization Contact

Other Address

Parent-Child Information

Phones

PrimaryNPEContact

Seasonal Address

Special Comments

Temporary Address

Suppress Duplicates

Category Name

Household Summary

Address

Amount Group

Average Gift Amount

ContactId

First Gift Amount

First Gift Date

FormalSalutation

Frequency Group

Highest Gift Amount

Highest Gift Date

Household Id

Household Salutation

InformalSalutation

Last Gift Amount

Last Gift Date

Last Interaction

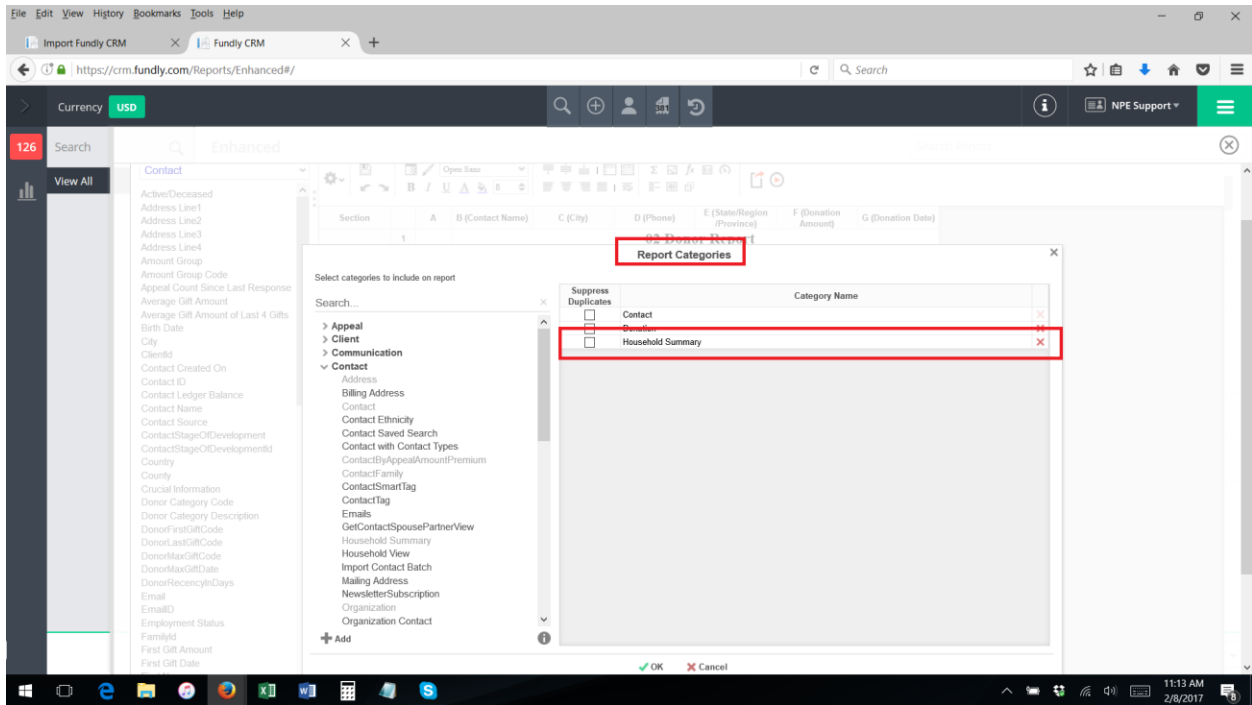
Last Interaction Date

Last Updated On

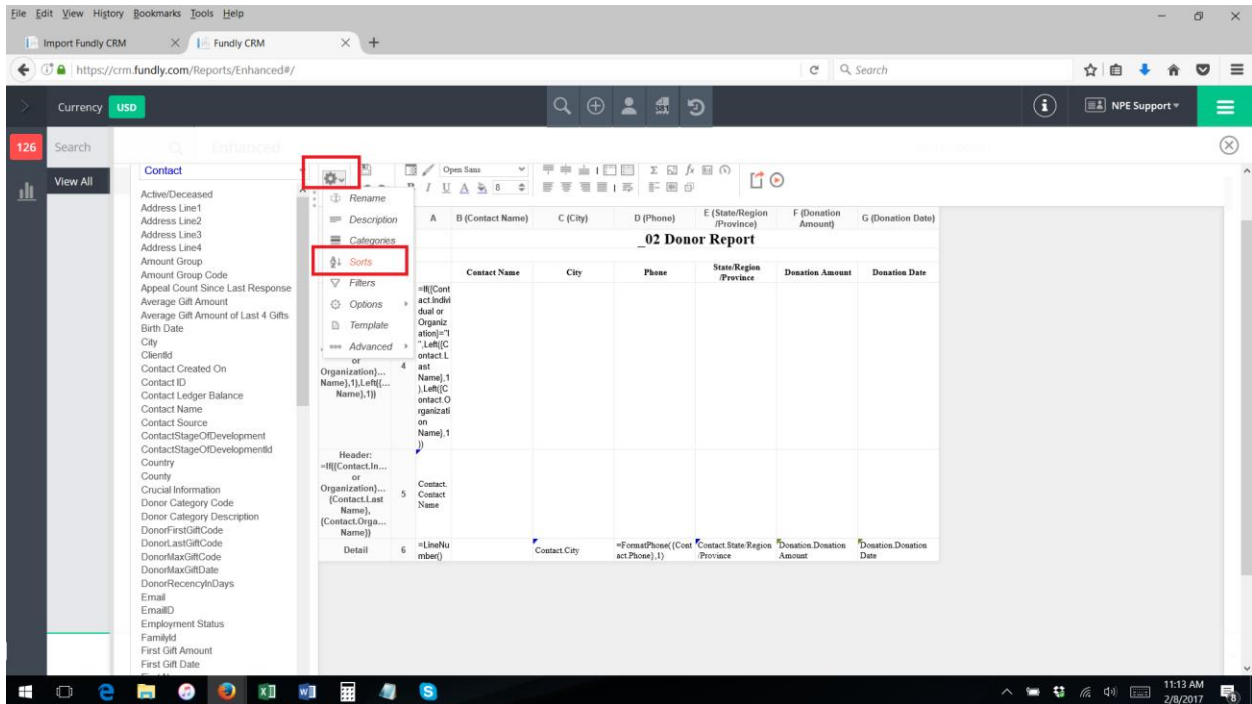
Close

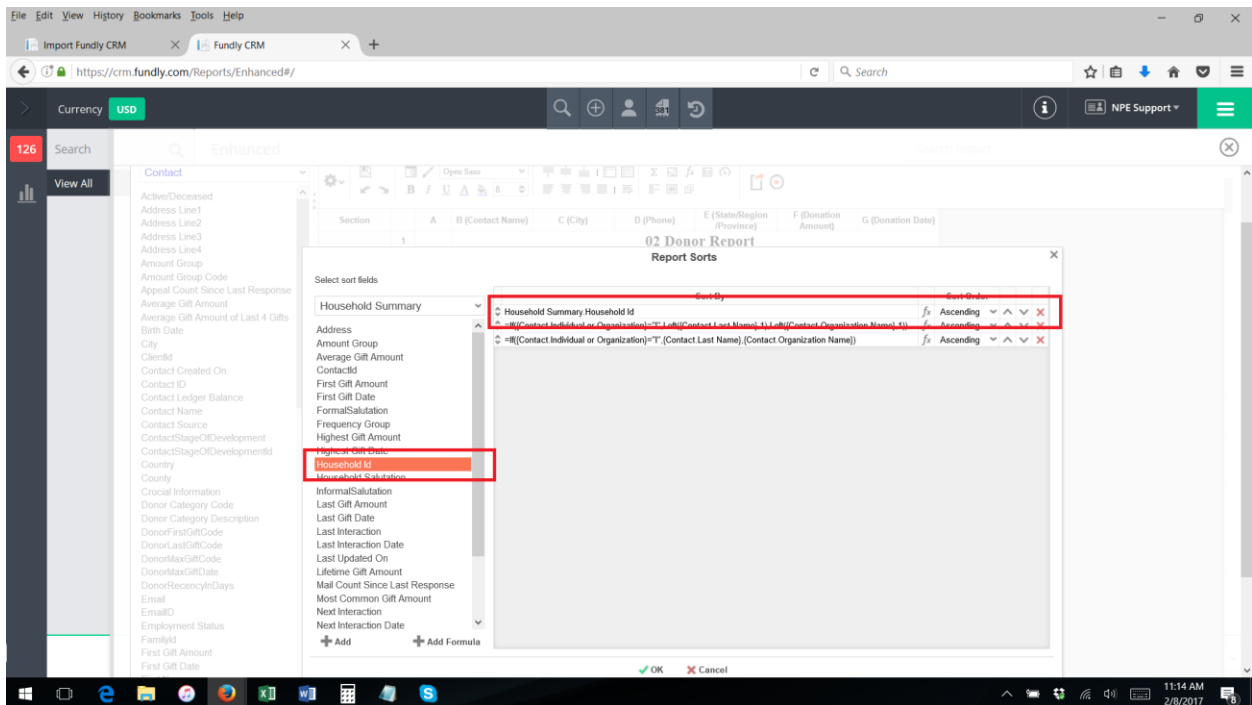
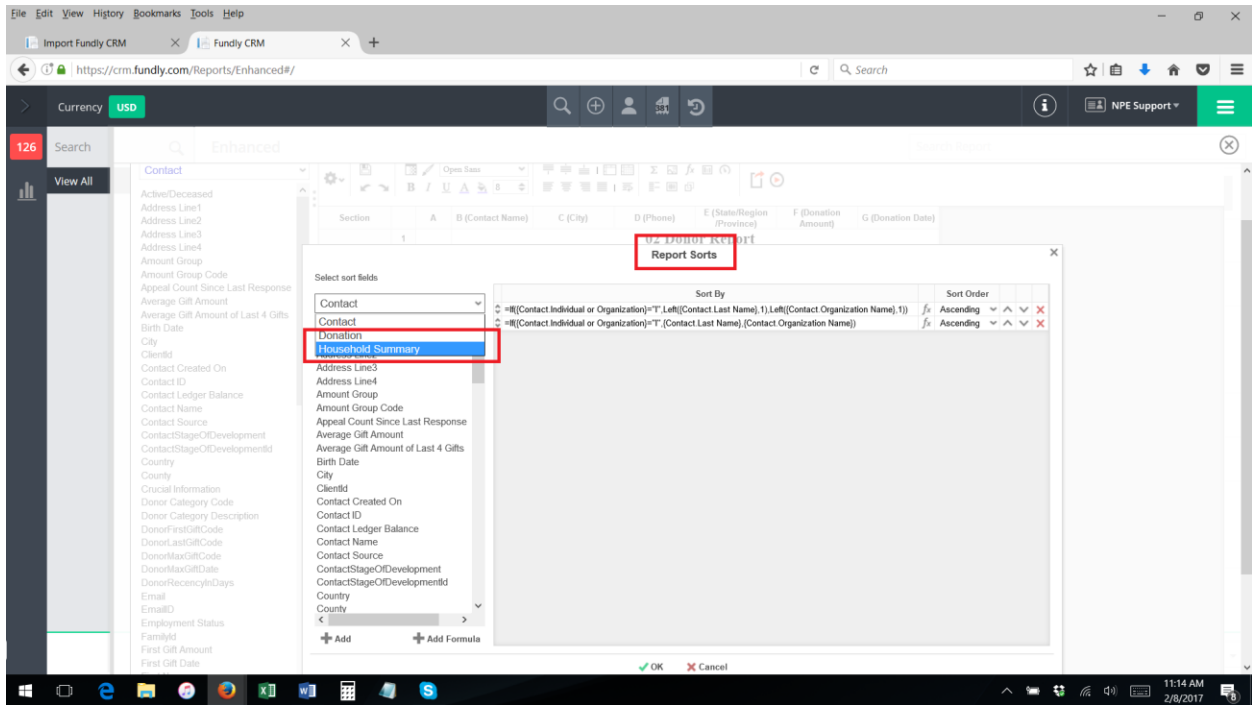
OK Cancel

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4. On the sorts tab, add the Household ID field as a sort.





5. If you wish to also group by Household, on the layout add a Group Header or Group Footer on Household ID (see our [tutorial on adding grouping](#)).
6. You can display the Household ID on the report (to make it easier to identify which contacts are in the same household) by adding it to the report layout.

7. Conversely, you can also sort/group on Address Line 1 if members of your household share the same address (and you have address data in your records). Simply add the Contacts table to your report and add Address Line 1 to your sorts.