

## FAQ: How to Convert Month Numbers to Month Names

1. By default, months are displayed on a report as a number (date fields are formatted xx/xx/xxxx and pulling out the month portion of a date just pulls out the numbers used for the month in the date). For aesthetic reasons, users may prefer to convert the month from a number to a name (e.g. convert “1” to “January”).
2. Using the “Month Name” function, user can convert a date month from a number (e.g. 1-12) to the corresponding month name (e.g. “1” would be converted to January).
3. To get started, add a date field to a report.
4. Click on the date field to highlight the cell and then click on the function/formula editor (fx) button.

The screenshot shows the Fundly CRM interface for configuring a report. The main window displays a table with the following columns: Section, A (Contact Name), C (City), D (Phone), E (State/Region/Province), F (Donation Amount), and G (Donation Date). The table is titled "02 Donor Report". A sidebar on the left lists various fields available for selection, including "Donation Date". A red box highlights the "fx" button in the top toolbar, and another red box highlights the "Donation Date" field in the table.

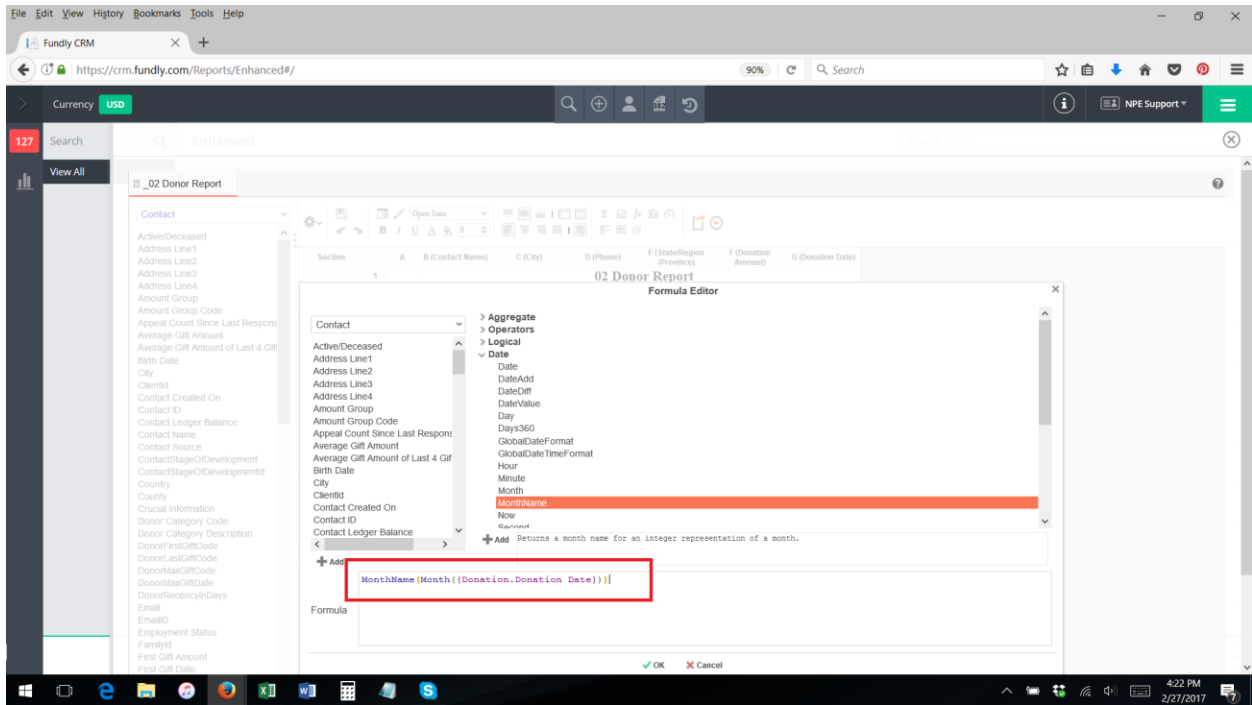
5. On the formula editor, select the Date category, and then add select/Add the “Month” function to the date field. This will pull out the month portion of the date. However, the date will still appear on the report as a number.



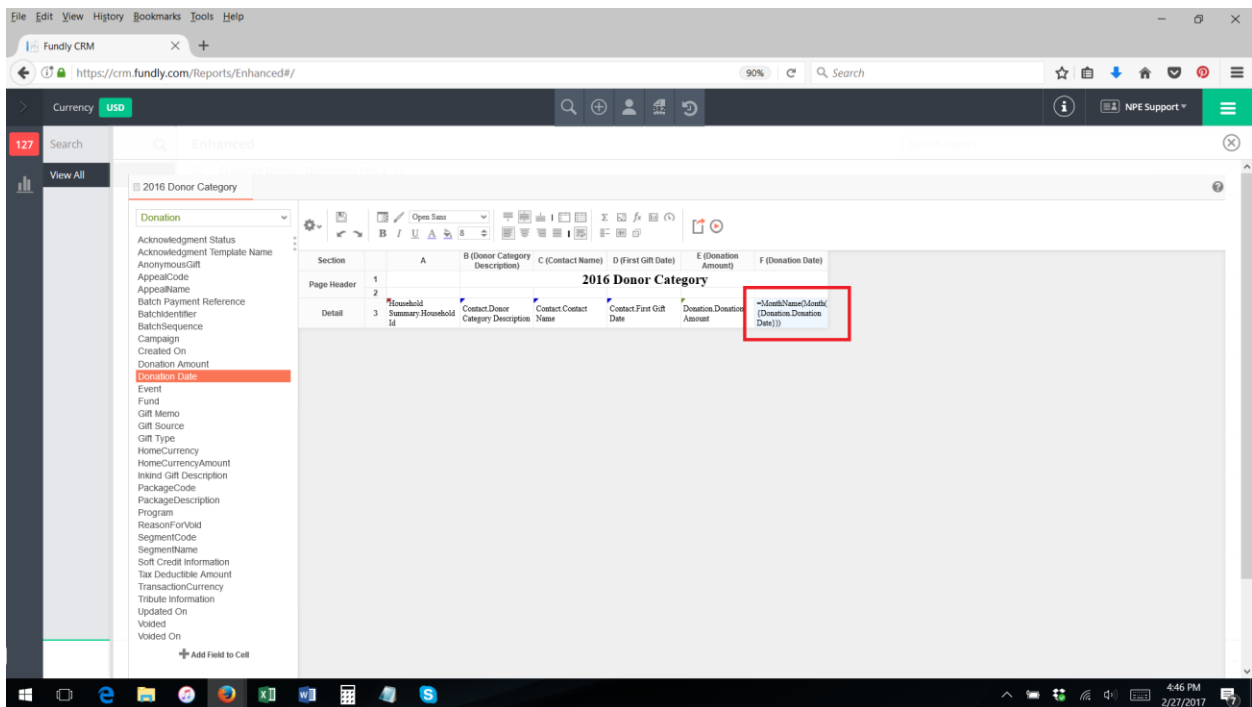
	Contact Name	City	Phone	State/Region (Province)	Donation Amount	Donation Date
A						
1	Adam Alaba	Robson Park		CA	\$500	1
2		Robson Park		CA	\$12	12
3		Robson Park		CA	\$50	6
4		Robson Park		CA	\$50	6
5	Onamy Achang				\$100	1
6	Acme Corporation					
7		Holt		CA	\$20	10
8		Holt		CA	\$10	7
9		Holt		CA	\$5	12
10		Holt		CA	\$200	7
11		Holt		CA	\$250	10
12	Abigail Adams				\$10	8
13					\$0	2
14					\$50	2
15					\$120	11
16	Alameda County				\$1,500	7
17	Bob Amazing	Robson Park		CA	\$10	2
18		Robson Park		CA	\$10	8

- To convert that number to a name, select the Month Name function and add it to the formula. Make sure to put it before the "Month" function and make sure you have nested all of the parentheses correctly.

The screenshot shows the 'Formula Editor' window in Fundly CRM. The window title is '02 Donor Report' and 'Formula Editor'. On the left, there is a list of fields and functions. The 'Date' function is highlighted in red. Below it, the 'MonthName' function is also highlighted in red. The formula field at the bottom contains the text: `Month({Donation, Donation Date})`. The 'Add' button is visible below the formula field.



7. Click okay to close the formula editor.
8. You will see the formula has been added to the report.



9. Now when you run the report, the date is displayed as the month name.

The screenshot shows a web browser window displaying the Fundly CRM interface. The main content is a table titled "\_02 Donor Report". The table has columns for Contact Name, City, Phone, State/Region /Province, Donation Amount, and Donation Date. The data is sorted by month, with January donations listed first, followed by February, March, etc. A red rectangular box highlights the "Donation Date" column.

	Contact Name	City	Phone	State/Region /Province	Donation Amount	Donation Date
A						
Adam						
Albaha						
1		Robson Park		CA	\$500	January
2		Robson Park		CA	\$12	December
3		Robson Park		CA	\$50	June
4		Robson Park		CA	\$50	June
Osamy						
Aching						
5					\$100	January
Acme						
Corporate						
int						
6		Holt		CA	\$20	October
7		Holt		CA	\$10	July
8		Holt		CA	\$5	December
9		Holt		CA	\$200	July
10		Holt		CA	\$200	July
11		Holt		CA	\$250	October
M.						
Abigail						
Adams						
12					\$10	August
13					\$0	February
14					\$50	February
15					\$120	November
Alameda						
County						
16					\$1,500	July
Bob						
Amazing						
17		Robson Park		CA	\$10	February
18		Robson Park		CA	\$10	September

10. You cannot use the Month Name function without first using the Month function – the Month Name function will not work by itself.
11. Using the Month function by itself, you can sort and group dates by month, rather than in chronological order of date.
12. For instance, using the date function in the sorts tab, will allow us to sort our donations by month regardless of day and year made. In this example, we have sorted by month first, then by date after that. As you can see in the screenshots below, the result is that all donations made in January are listed first (in chronological order), then all donations made in February, etc.

File Edit View History Bookmarks Tools Help

Fundly CRM

https://crm.fundly.com/Reports/Enhanced/#

Currency USD

127 Search

Enhanced

2016 Donor Category

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 Gift  
Birth Date  
City  
ClientID  
Contact Created On  
Contact ID  
Contact Ledger Balance  
Contact Name  
Contact Source  
Contact Stage Of Development  
Contact Stage Of Development ID  
Country  
Crucial Information  
Donor Category Code  
Donor Category Description  
Donor First Gift Code  
Donor Last Gift Code  
Donor Max Gift Code  
Donor Max Gift Date  
Donor Recency In Days  
Email  
EmailID  
Employment Status  
FamilyID  
First Gift Amount  
First Gift Date

Report Sorts

Select sort fields

Donation

Sort By

Sort Order

Descending

OK Cancel

4:26 PM 2/21/2017

File Edit View History Bookmarks Tools Help

Fundly CRM

https://crm.fundly.com/Reports/Enhanced/#

Currency USD

127 Search

Enhanced

2016 Donor Category

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 Gift  
Birth Date  
City  
ClientID  
Contact Created On  
Contact ID  
Contact Ledger Balance  
Contact Name  
Contact Source  
Contact Stage Of Development  
Contact Stage Of Development ID  
Country  
Crucial Information  
Donor Category Code  
Donor Category Description  
Donor First Gift Code  
Donor Last Gift Code  
Donor Max Gift Code  
Donor Max Gift Date  
Donor Recency In Days  
Email  
EmailID  
Employment Status  
FamilyID  
First Gift Amount  
First Gift Date

Formula Editor

Operators

Logical

Date

DateAdd  
DateDiff  
DateValue  
Day  
Days360  
GlobalDateFormat  
GlobalDateTimeFormat  
Hour  
Minute  
Month  
Second  
Time

Month ( {Donation, Donation Date} )

Formula

OK Cancel

4:27 PM 2/21/2017







14. The Month and Month Name functions can be very useful when working with cross-tab reports in that they allow you to see data by month, rather than by chronological date and/or instead of by month (for instance, if we wish to see all of our 2016 donations, totaled by month).

The screenshot displays a web browser window with the Fundly CRM interface. The main content area shows a cross-tab report titled "Terri's Cross Tab Demo". The report is a table with columns for years 1 through 12 and a "Total" column. The rows represent different gift sources: In Person, Online, Mail, Ignite, Facebook, and Fundly. The data is presented in a grid format with numerical values for each cell.

_ Terri's Cross Tab Demo														
Gift Source	Year	1	2	3	4	5	6	7	8	9	10	11	12	Total
In Person		\$3,845	\$12,960	\$2,859	\$20,090	\$126,972	\$7,000	\$5,187	\$1,880	\$12,722	\$7,710	\$11,868	\$15,855	\$238,748
Online		\$8,084	\$7,001	\$2,632	\$34,583	\$746	\$7,405	\$44,544	\$1,753	\$17,281	\$3,105	\$3,219	\$43,594	\$173,948
Mail		\$4,993	\$6,763	\$12,403	\$5,072	\$1,725	\$15,310	\$15,770	\$21,037	\$10,558	\$4,356	\$12,434	\$13,150	\$124,577
Ignite		\$120	\$100	\$100	\$500	\$100	\$1,100			\$2,233	\$308	\$100	\$200	\$5,942
Facebook		\$218	\$450		\$1,792	\$850	\$5			\$735	\$5	\$24		\$4,078
Fundly		\$156	\$205							\$0	\$68			\$429
<b>Total</b>		\$17,416	\$27,478	\$18,895	\$70,137	\$130,392	\$30,815	\$65,506	\$24,470	\$43,530	\$15,633	\$27,645	\$72,805	\$544,823