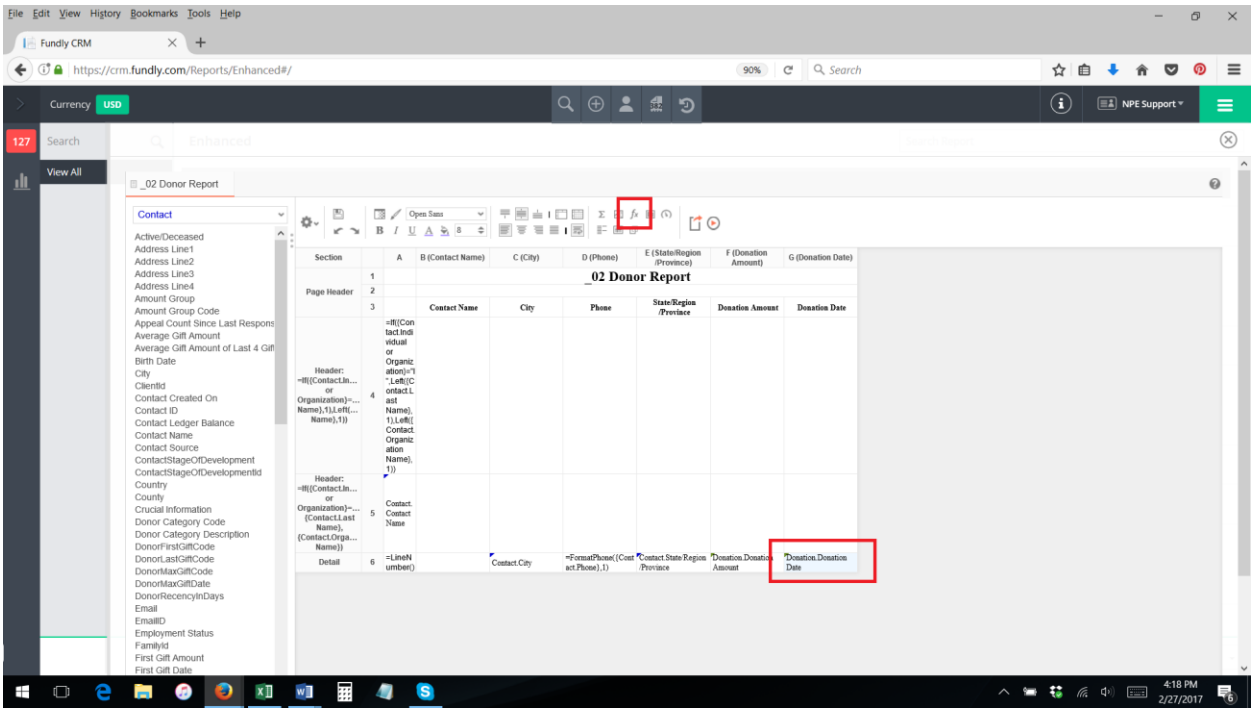
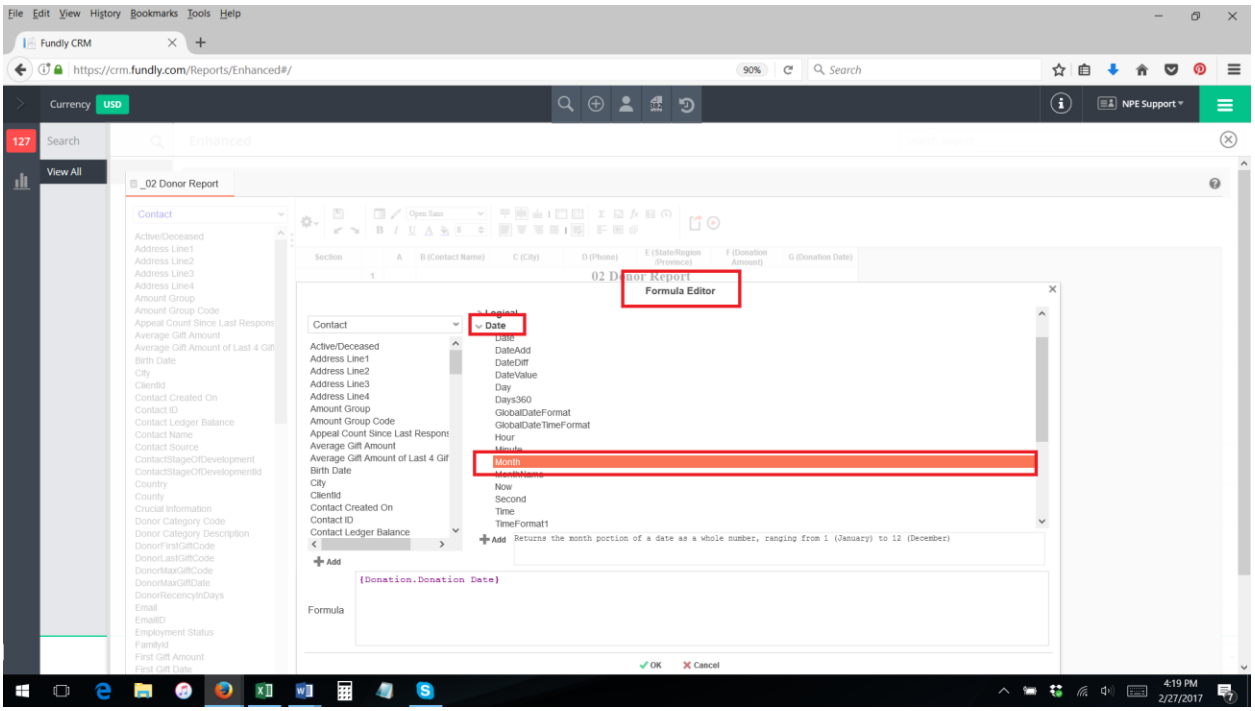
FAQ: How to Convert Month Numbers to Month Names

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.



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.


Fundly CRM
https://crm.fundly.com/Reports/Enhanced#/
Currency USD
NPE Support
_02 Donor Report
02 Donor Report
Formula Editor
Contact
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GlobalDateTimeFormat
Hour
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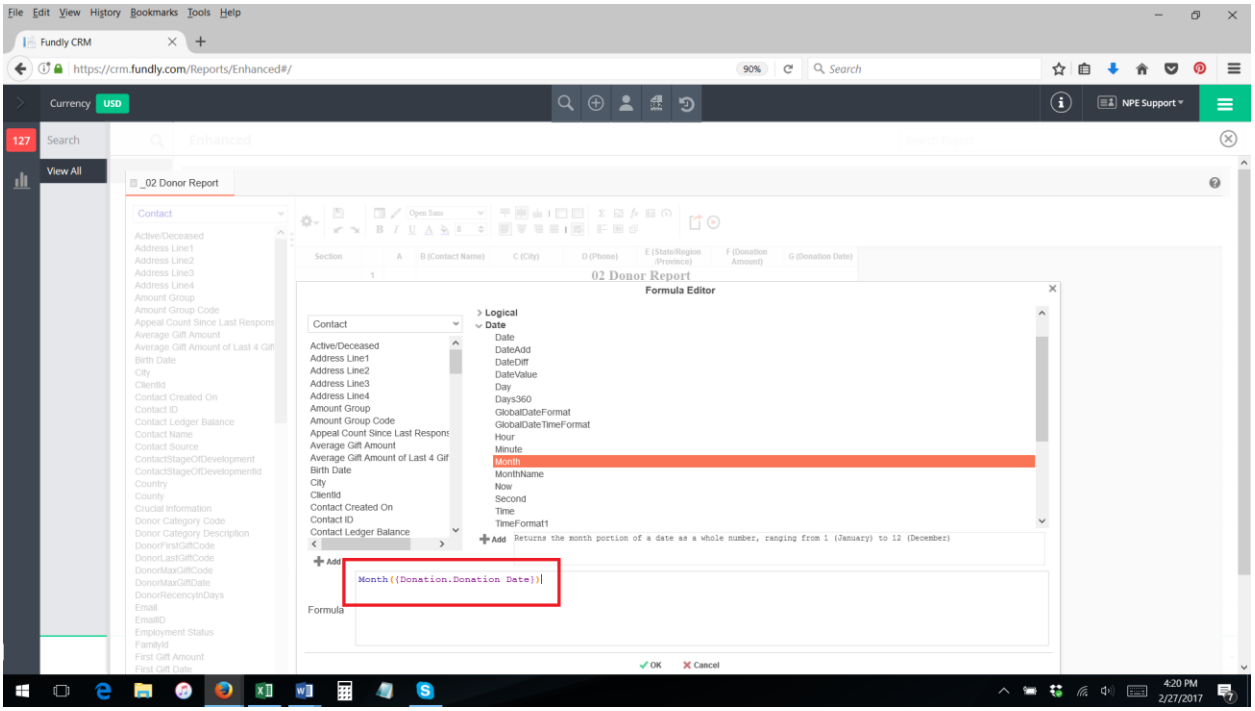
Month
MonthName
Now
Second
Time
TimeFormat1
Returns the month portion of a date as a whole number, ranging from 1 (January) to 12 (December)
{Donation.Donation Date}
Formula
OK
Cancel
4:19 PM
2/27/2017


Fundly CRM
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Currency USD
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DateValue
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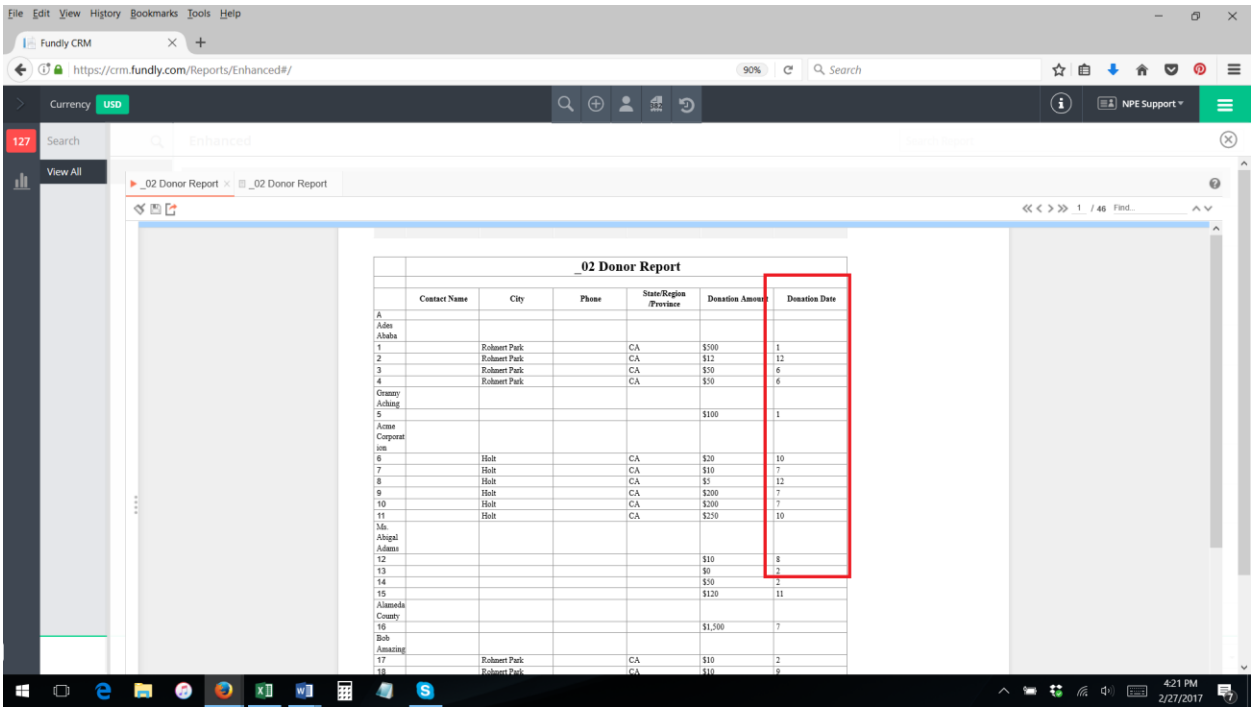
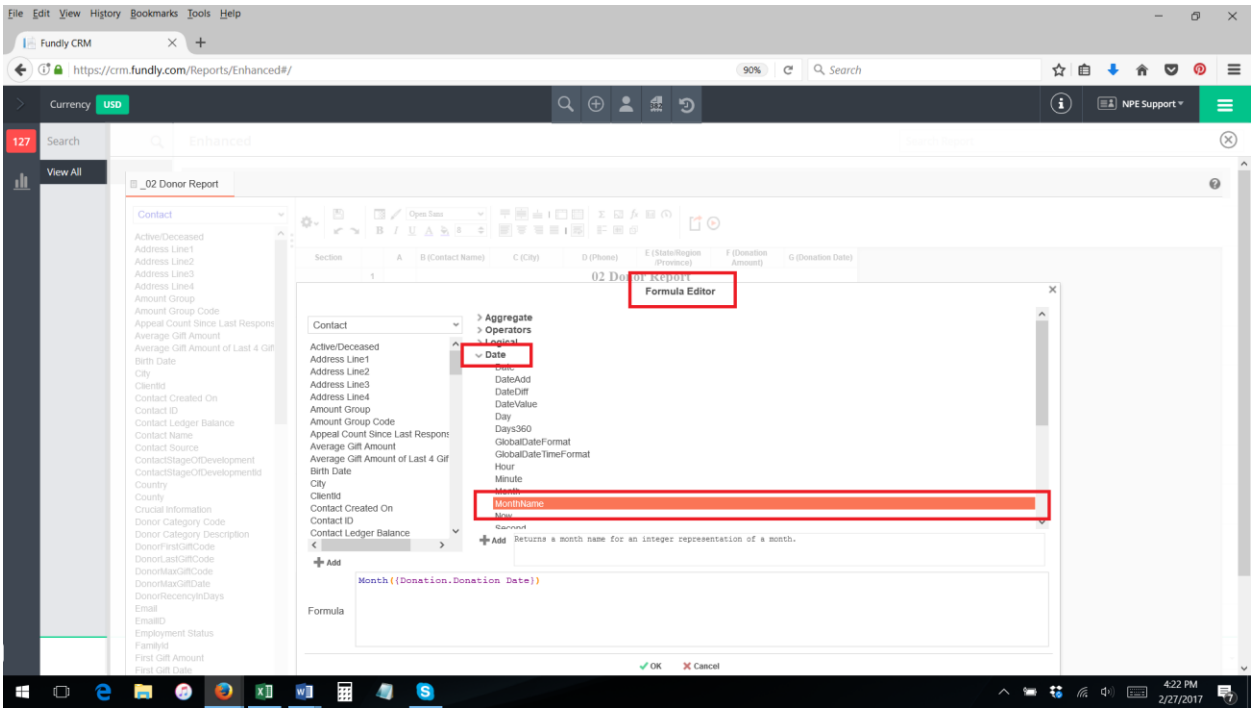
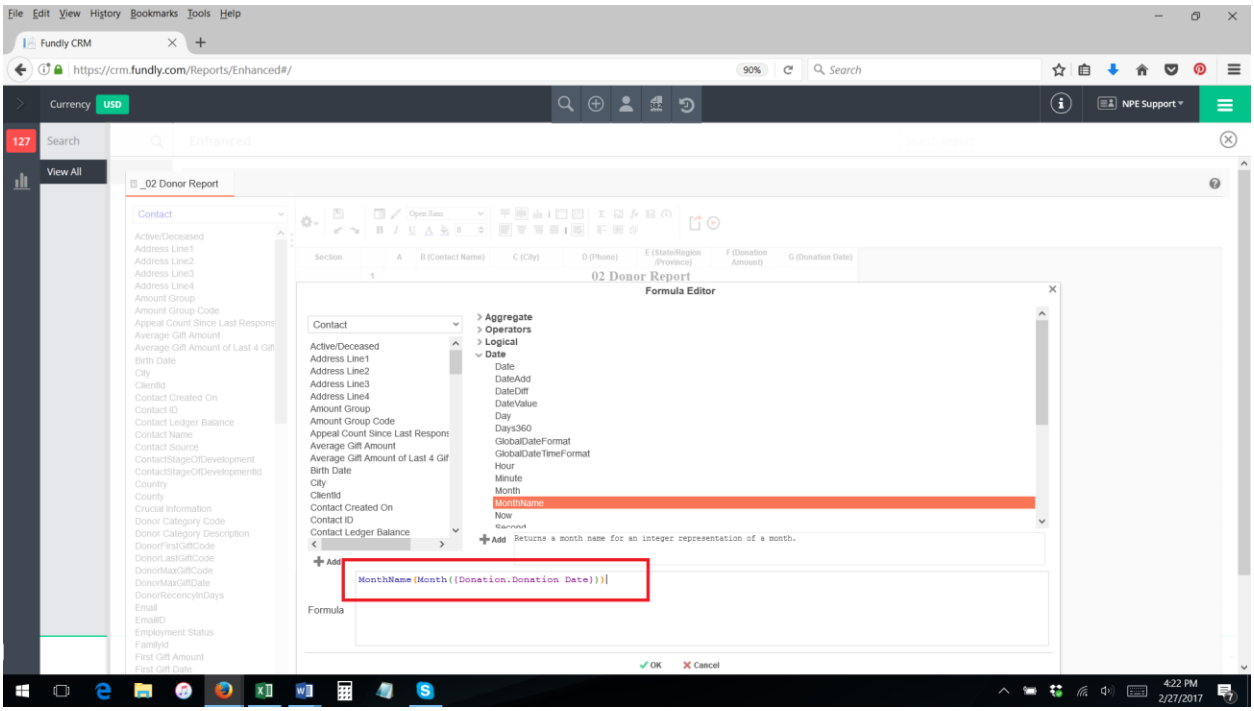
Days360
GlobalDateFormat
GlobalDateTimeFormat
Hour
Minute
Month
MonthName
Now
Second
Time
TimeFormat1
Returns the month portion of a date as a whole number, ranging from 1 (January) to 12 (December)
Month({Donation.Donation Date})
Formula
OK
Cancel
4:20 PM
2/27/2017

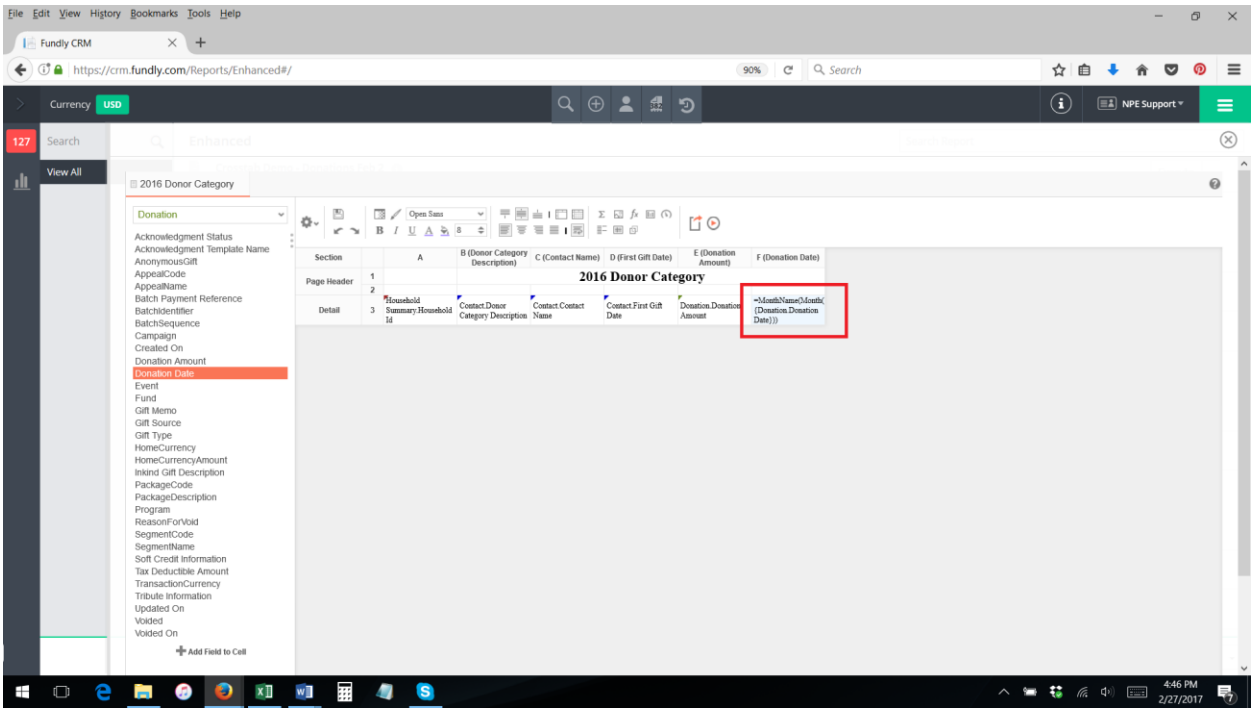


6. To convert that number to a name, select the Month Name function and add it to the formula. Make sure to put it before the “Month” function and make sure you have nested all of the parentheses correctly.

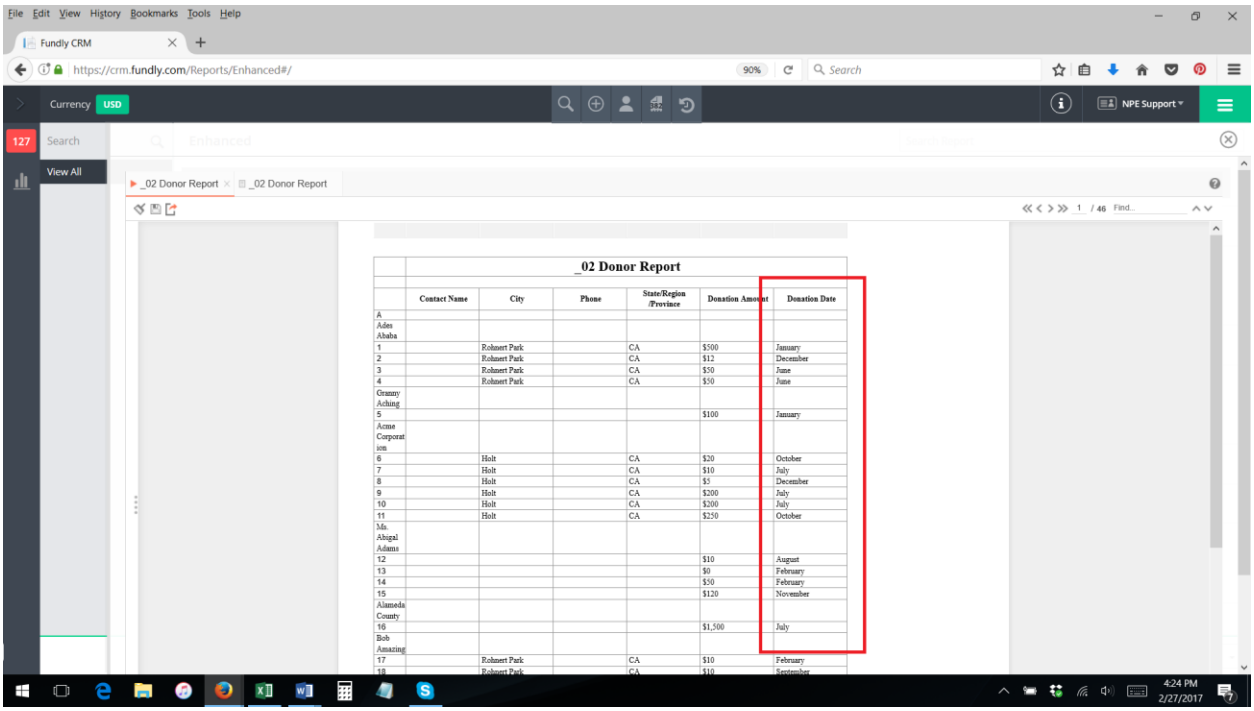




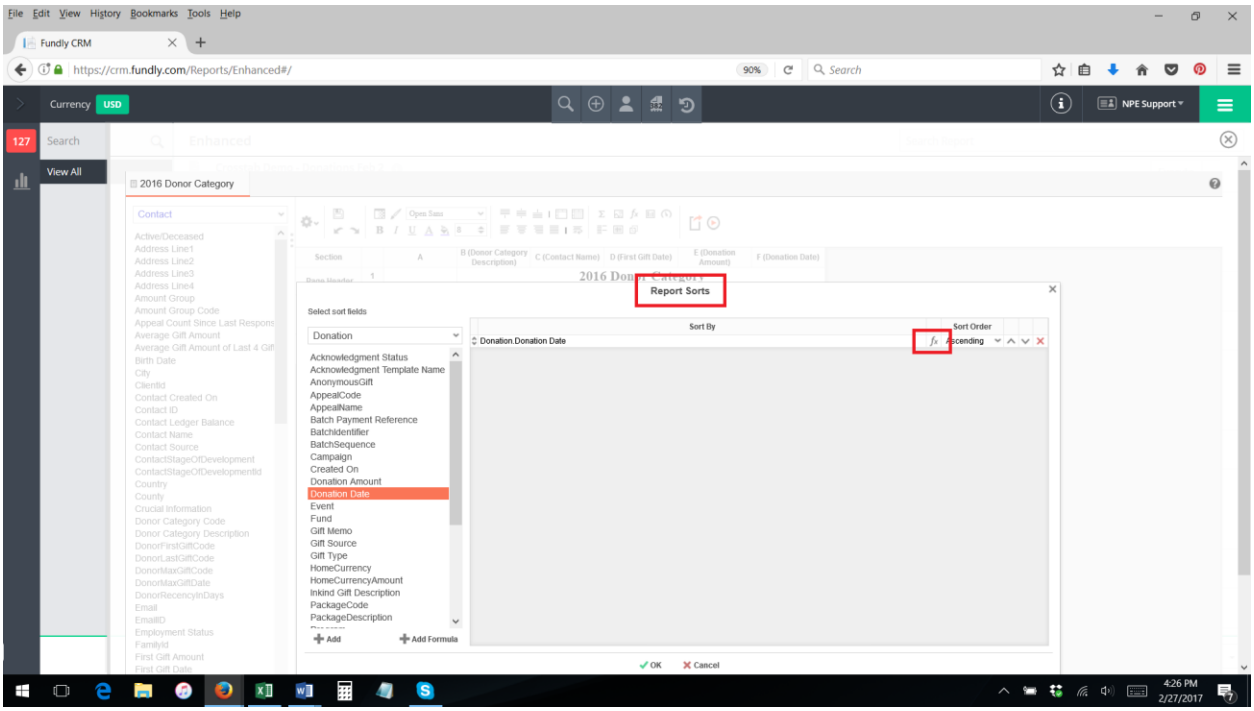
7. Click okay to close the formula editor.
8. You will see the formula has been added to the report.



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



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.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Currency USD
NPE Support
2016 Donor Category
Report Sorts
Select sort fields
Donation
Sort By
Sort Order
Donation.Donation Date
Ascending
Acknowledgment Status
Acknowledgment Template Name
AnonymousGift
AppealCode
AppealName
Batch Payment Reference
BatchIdentifier
BatchSequence
Campaign
Created On
Donation Amount
Donation Date
Event
Fund
Gift Memo
Gift Source
Gift Type
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Inkind Gift Description
PackageCode
PackageDescription
Add
Add Formula
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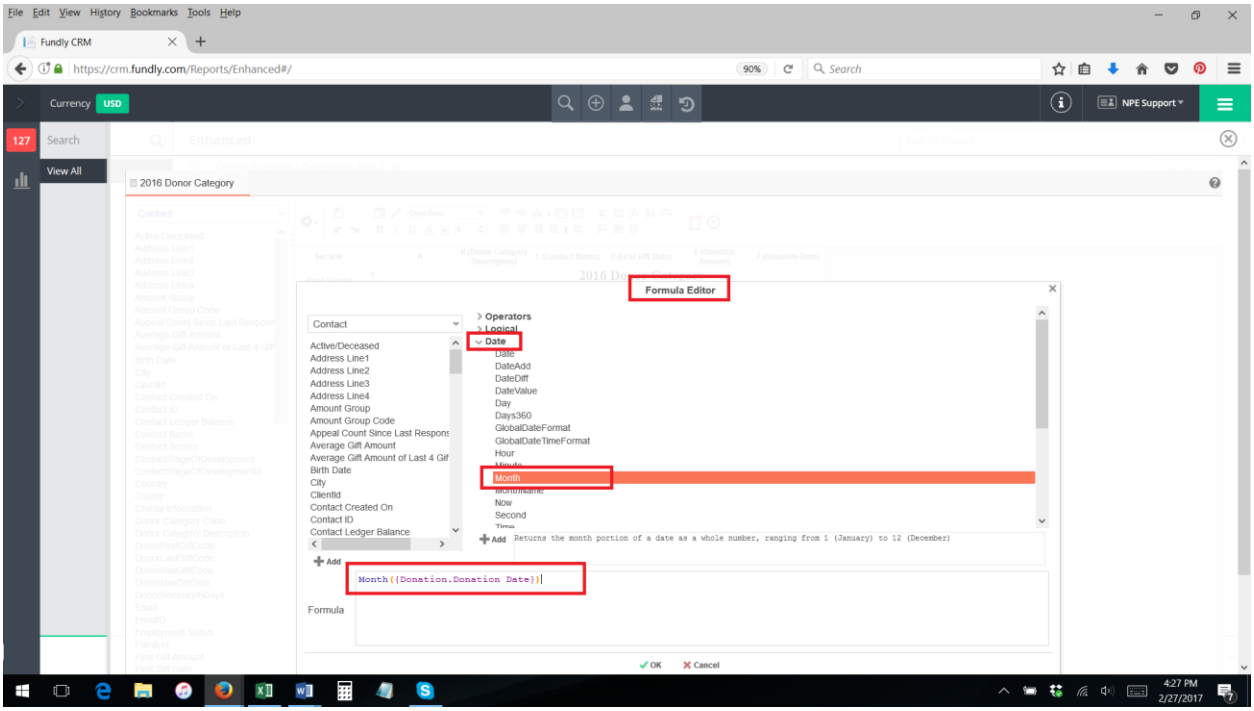
2/27/2017


Fundly CRM
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2016 Donor Category
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Days360
GlobalDateFormat
GlobalDateTimeFormat
Hour
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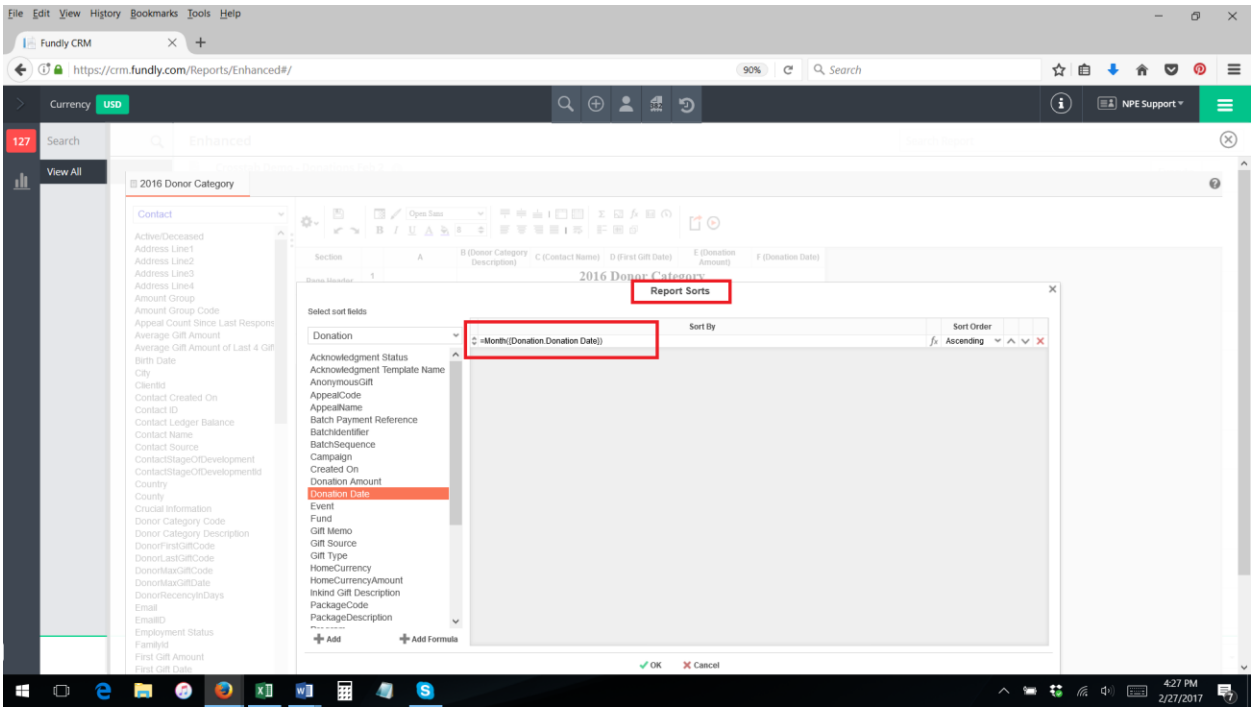
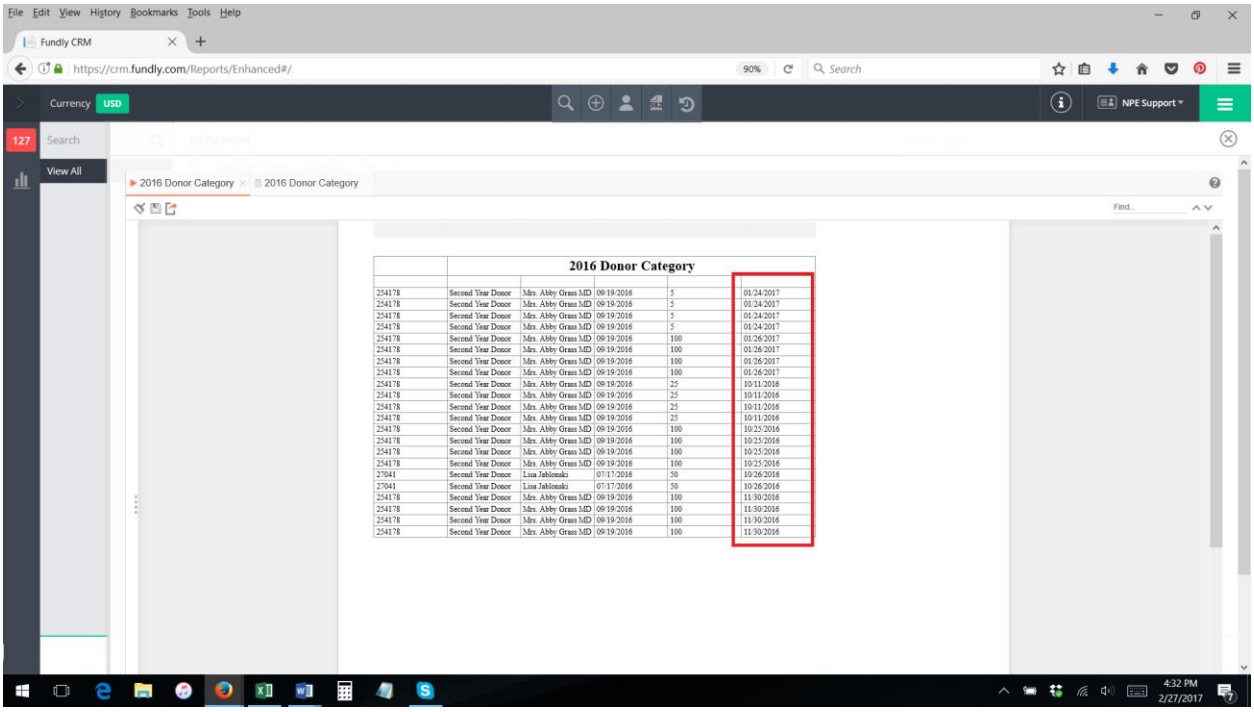
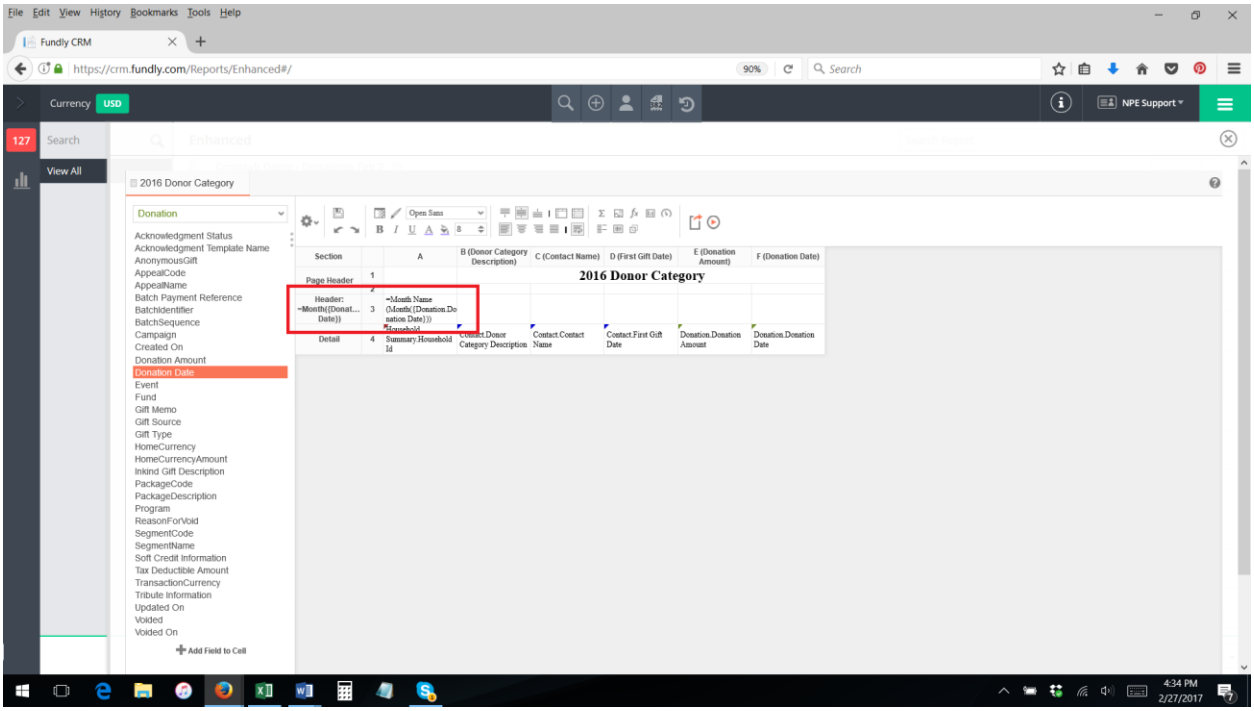
Now
Second
Returns the month portion of a date as a whole number, ranging from 1 (January) to 12 (December)
Month({Donation.Donation Date})
Formula
OK
Cancel
4:27 PM
2/27/2017





13. We can add a group header to the report for the Month and use the Month Name function to convert that header to the month name to make the report easier to read.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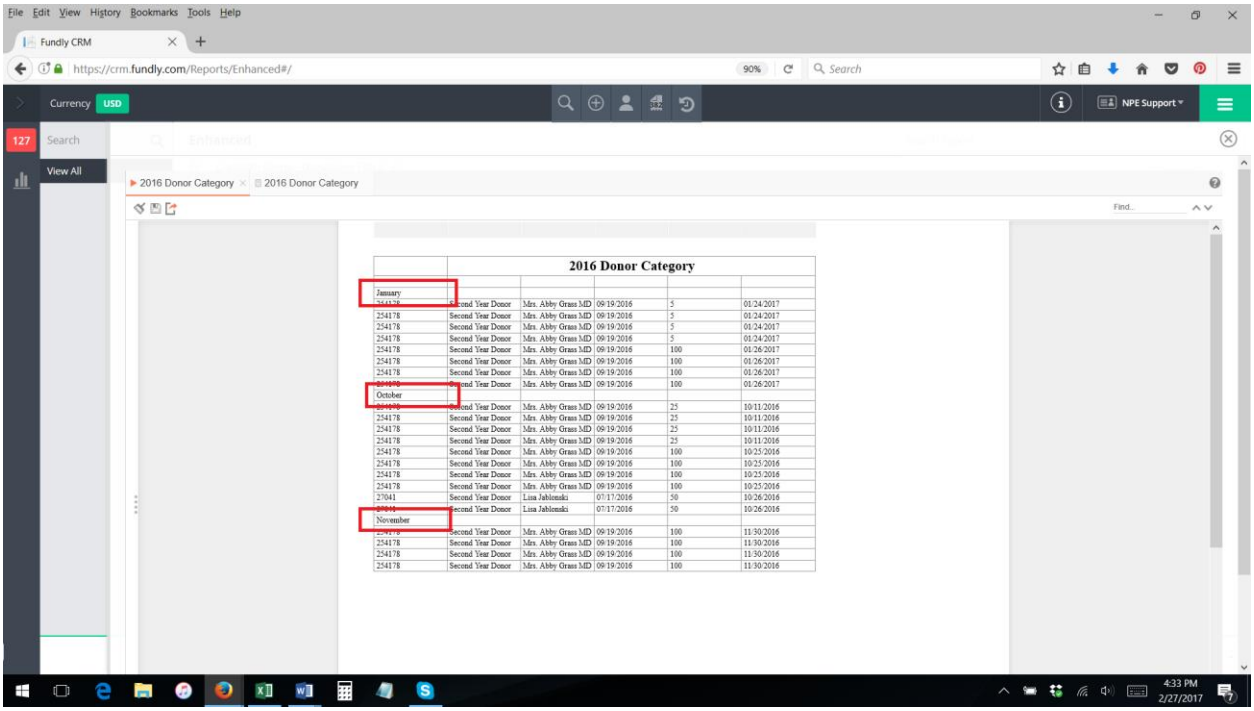
2016 Donor Category
Donation
Acknowledgment Status
Acknowledgment Template Name
AnonymousGift
AppealCode
AppealName
Batch Payment Reference
BatchIdentifier
BatchSequence
Campaign
Created On
Donation Amount
Donation Date
Event
Fund
Gift Memo
Gift Source
Gift Type
HomeCurrency
HomeCurrencyAmount
Inkind Gift Description
PackageCode
PackageDescription
Program
ReasonForVoid
SegmentCode
SegmentName
Soft Credit Information
Tax Deductible Amount
TransactionCurrency
Tribute Information
Updated On
Voided
Voided On
Add Field to Cell
Section
A
B (Donor Category Description)
C (Contact Name)
D (First Gift Date)
E (Donation Amount)
F (Donation Date)
Page Header
Header: =Month((Donat... Date))
=Month Name (Month((Donation.Donation Date)))
Detail
Summary.Household Id
Contact.Donor Category Description
Contact.Contact Name
Contact.First Gift Date
Donation.Donation Amount
Donation.Donation Date
2016 Donor Category
4:34 PM
2/27/2017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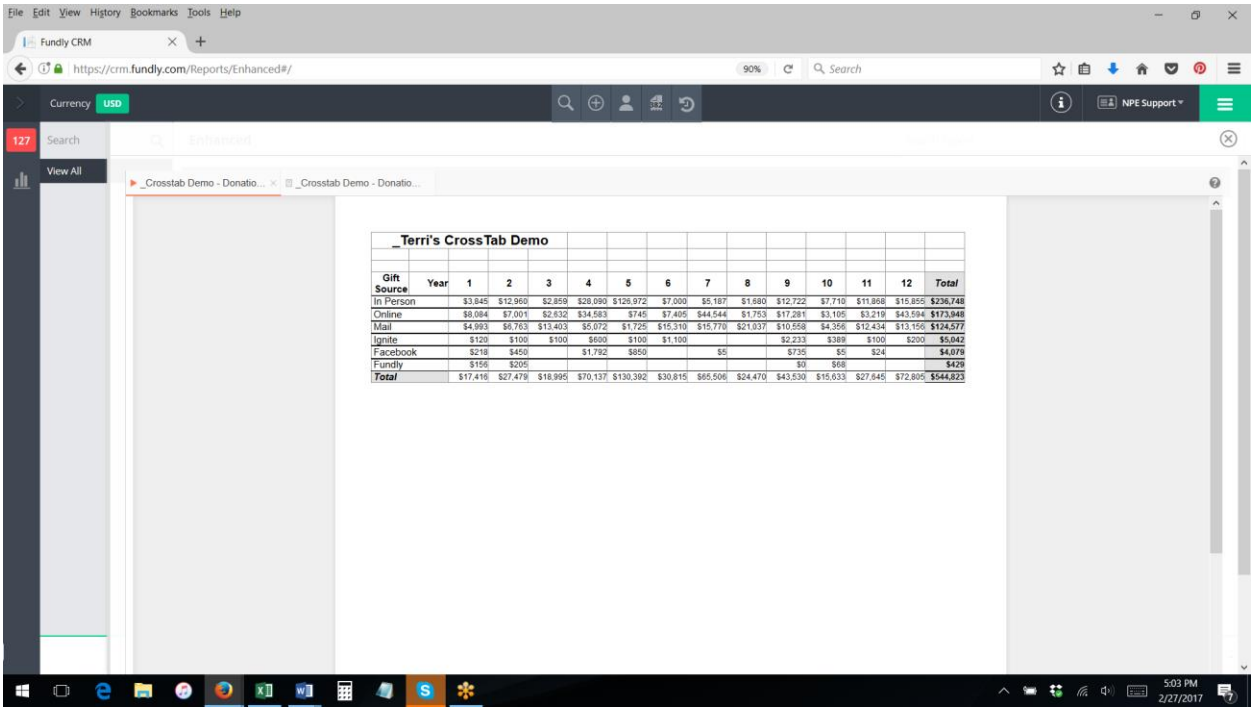
View All
2016 Donor Category
2016 Donor Category
2016 Donor Category
January
October
November
4:33 PM
2/27/2017

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).



_Terri's CrossTab 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	$28,090	$126,972	$7,000	$5,187	$1,680	$12,722	$7,710	$11,868	$15,855	$236,748
Online	$8,084	$7,001	$2,832	$34,583	$745	$7,405	$44,544	$1,753	$17,281	$3,105	$3,219	$43,594	$173,948
Mail	$4,993	$6,763	$13,403	$5,072	$1,725	$15,310	$15,770	$21,037	$10,558	$4,356	$12,434	$13,156	$124,577
Ignite	$120	$100	$100	$600	$100	$1,100			$2,233	$389	$100	$200	$5,042
Facebook	$218	$450		$1,782	$850		$5		$735	$5	$24		$4,079
Fundly	$156	$205							$0	$68			$429
Total	$17,416	$27,479	$18,995	$70,137	$130,392	$30,815	$65,506	$24,470	$43,530	$15,633	$27,645	$72,805	$544,823