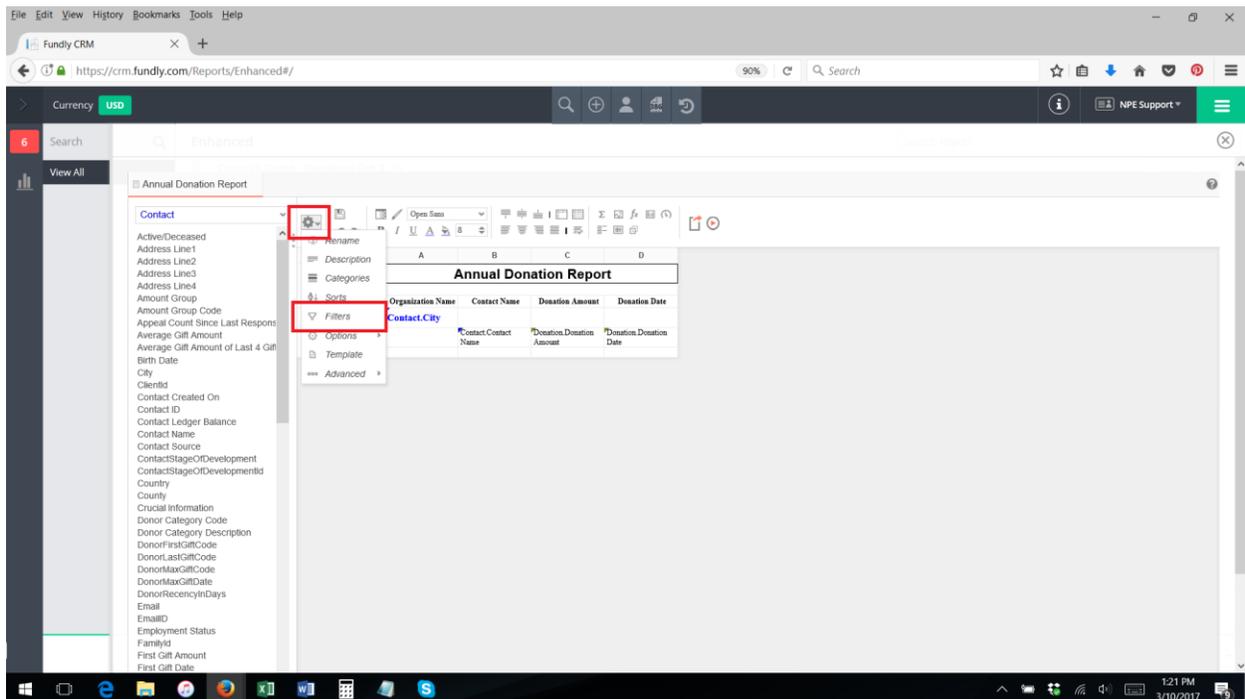
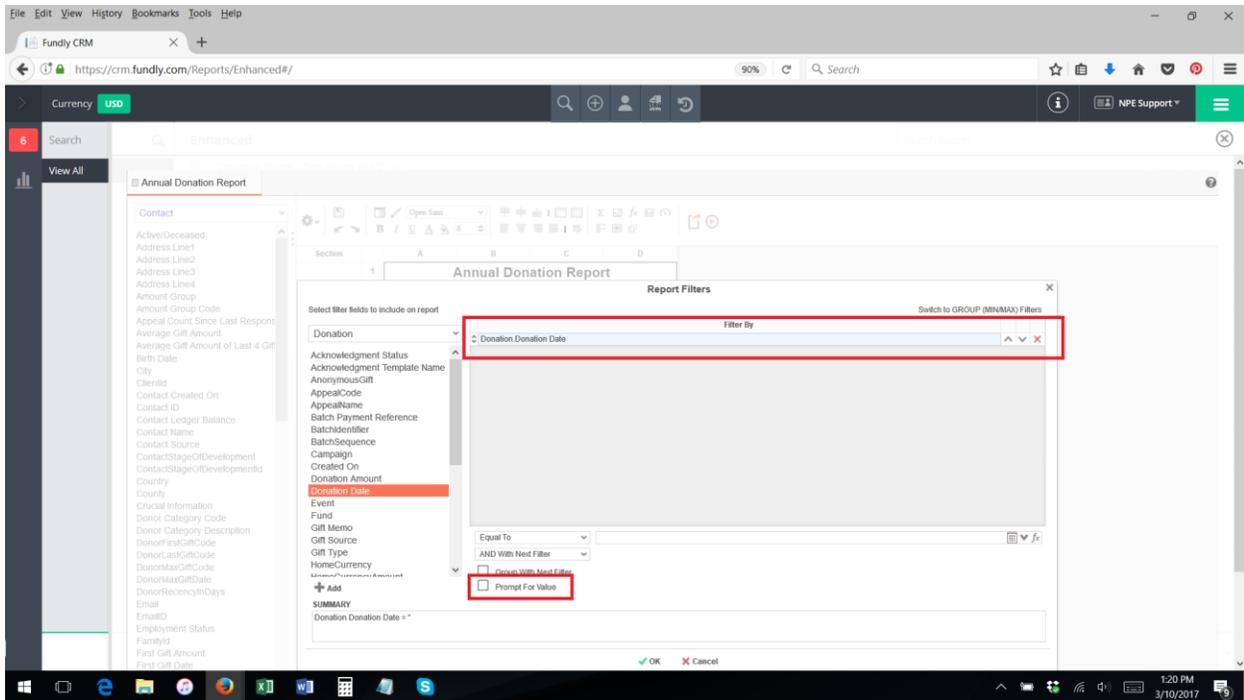


FAQ: How to Make Filters Prompt For Value Each Time a Report Is Run

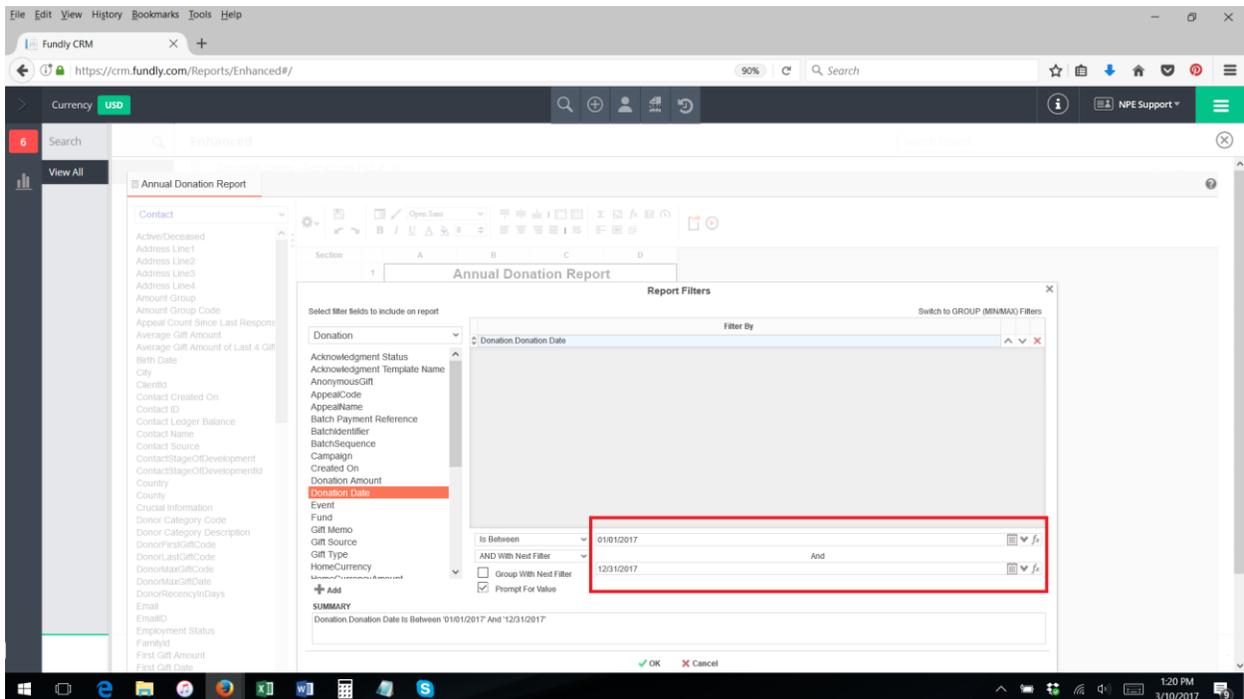
1. Report filters can be hard coded so that they have the same value every time a report is run (example: a hard coded filter of “Donate Date Between 1/1/2017 and 12/31/2017” means that every time a report is run) OR filters can be set to “Prompt for Value” which means the report will ask the user what criteria they want to use for their filter every time the report is run (example: a prompt for value filter of “Donation Date Between...” means that the report will ask the user to enter the date range they want to filter donations by every time the report is run).
2. Setting the report to “Prompt for Value” saves time, as the user does not have to edit the report/change the hard coded criteria every time they want to run the report. This can be a big time saver if you need to run the same report for different time periods, events, or other criteria. On the other hand, if the user does not need to change the criteria frequently, then hard coded values may be more efficient, as the user won’t be asked to enter the criteria every time the report is run. Your use of “Prompt for Value” will vary by report and depend on your needs.
3. To change the “Prompt for Value” setting on any given report (that is, to turn Prompt for Value on or off), start by editing the report and going to the Filters tab.



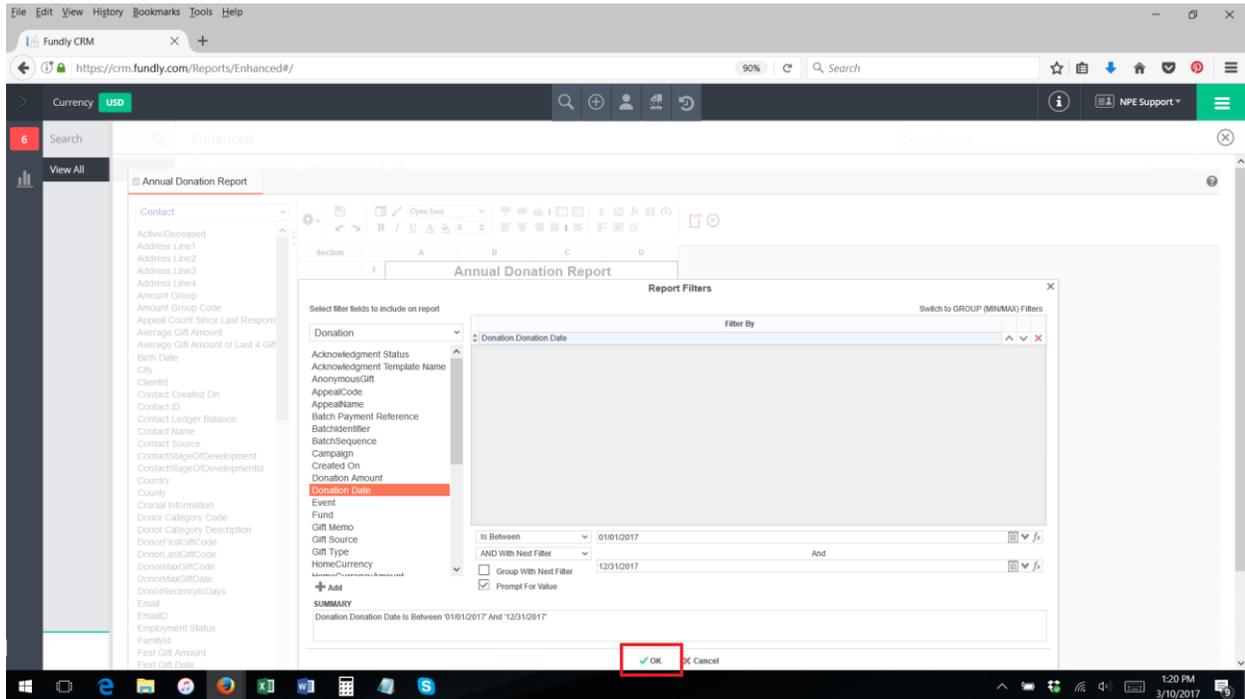
4. Click on an individual filter that is on the report.
5. At the bottom of the screen, under the criteria, you will see the “Prompt for Value” check box. Checking this box will enable prompt for value on the report for that filter; unchecking the box will turn off prompt for value for that filter for that report.



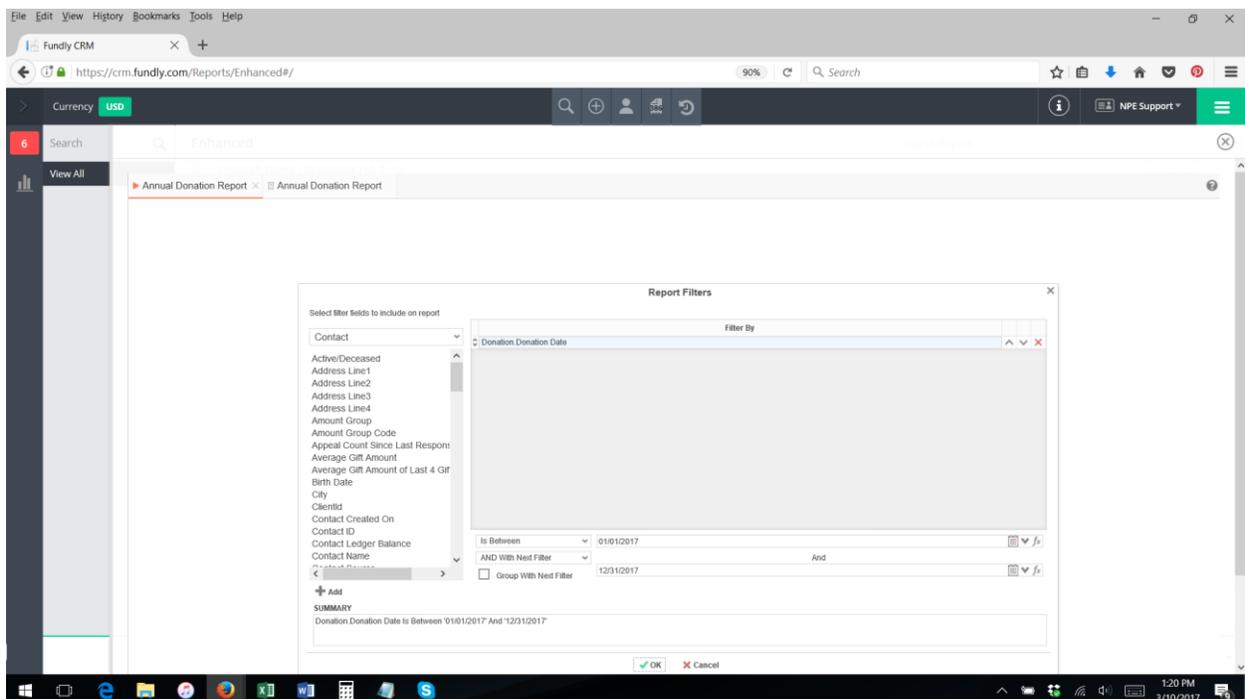
6. You may opt to set some of your filters to prompt for value and some to be hard coded in the same report.
7. With Prompt for Value enabled, you can also enter default values in your criteria that the report will pre-populate to the filter field when the report is run. If you have enabled “Prompt for Value” for that filter, you will be given the option to change/over-write the default when the report is run. You can also opt to leave the filter criteria filters blanks so that you have to fill in the value each time with no default value.



8. Click OK when you are done setting your filters.



9. Now, when you run the report, any filters set to Prompt for Value will pop up, allowing the user to enter/change the filter value.



10. User is able to overwrite/change any default values by simply replacing them.

File Edit View History Bookmarks Tools Help

Fundly CRM

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

Currency USD

Search Enhanced

Annual Donation Report

Report Filters

Select filter fields to include on report

- Contact
- Active/Deceased
- Address Line1
- Address Line2
- Address Line3
- Address Line4
- Amount Group
- Amount Group Code
- Appeal Count Since Last Respon
- Average Gift Amount
- Average Gift Amount of Last 4 Gif
- Birth Date
- City
- ClientID
- Contact Created On
- Contact ID
- Contact Ledger Balance
- Contact Name

Filter By

Donation Donation Date

Is Between 01/01/2016 And 03/31/2016

AND With Next Filter

Group With Next Filter

Summary: Donation Donation Date Is Between '01/01/2016' And '03/31/2016'

OK Cancel

1:20 PM 3/10/2017