FAQ: How to Sort a Report with Both Individuals and Organizations Alphabetically

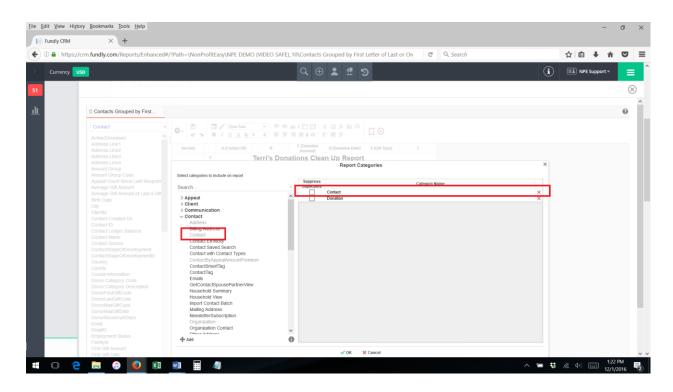
1. This FAQ will cover how to sort a report alphabetically that includes both Individuals and Organizations. For example:

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		Jennifer Aniston	117321	\$100	11/30/2015	Gift	ō				
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For a Report That Just Sorts by Name WITHOUT the Letter (A, B, C, etc.) Headers/Separators (for example, for a mailing list report):

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- 2. First, you must add an "if" statement to your Sorts that tells the report to sort by Individual Last Name if the contact record type is Individual Contact and to sort by Organization name if the contact record type is an Organization.
- 3. To do this, make sure the "Contacts" category/table is included on your Categories tab (click the gear icon and select Categories).



- 4. Next, go to the Sorts tab (click the gear icon again and select "Sorts).
- 5. Add the field "Individual or Organization" from the Contact table.

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6. Click the "fx" next to the field name in the Sort Order column

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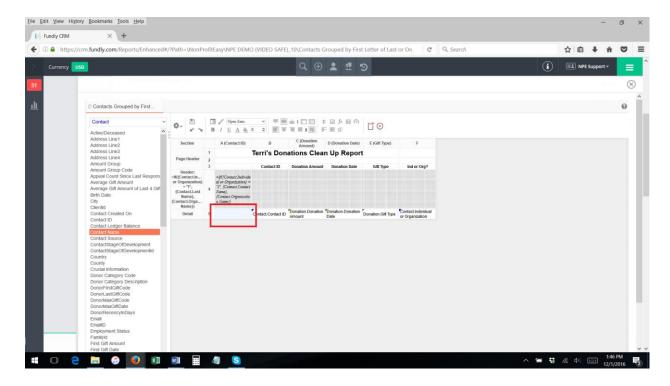
7. Add the following formula (you can type it in, select the "if" function from the function list, or copy and paste from below):

If({Contact.Individual or Organization} = "I", {Contact.Last Name}, {Contact.Organization Name})

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8. Click OK

- 9. Next, you will want to have one column that displays "Name" and which displays the individuals First and Last Name if the contact record type is Individual and the Organization Name if the contact record type is organization.
- 10. On the report Layout, click in the cell where you want the "name" field to appear.



11. Copy and paste the following formula (or type it in/use the fx/formula editor to add it):

=If({Contact.Individual or Organization} = "I", {Contact.Contact Name}, {Contact.Organization Name})

12. Now when you run the report it will sort Organizations and Individuals together and display the "name" in one column.

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		Bob Amazing	101143	\$25	02/09/2016	Gift	i					
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		Bob Amazing	101143	\$10	02/09/2016	Gift	1					
		Bob Amazing	101143	\$100	12/02/2015	Gift	1					
		Bob Amazing	101143	\$0	09/08/2015	Gift	1					
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		Angel's Cove	117321	\$100	11/30/2015	Gift	0					
		Jennifer Aniston	111235	\$20	09/06/2016	Gift	1					
		Jennifer Aniston	111235		11/22/2016	Gift	1					
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13. If you want each name to appear just once, then you can add a group header on the sort formula created in Step #7.

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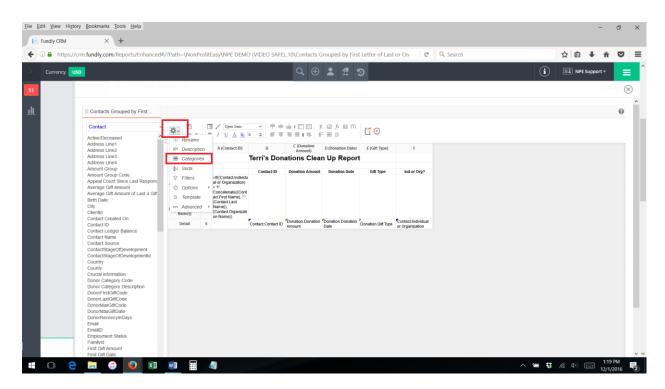
14. Then we added our formula in Step #10 for the display name to the group header area.

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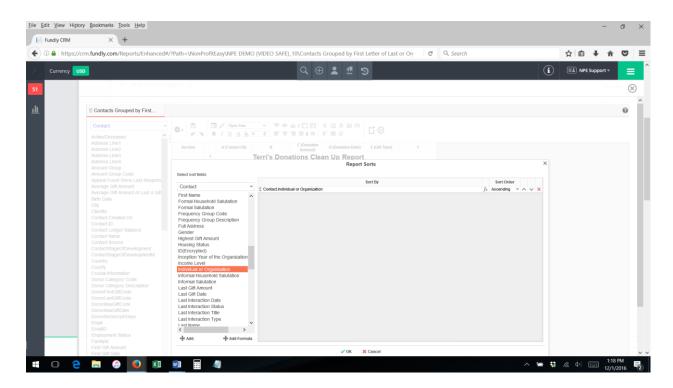
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		A	Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?					
		Ades Ababa										
			242763	\$500	01/28/2016	Gift	1					
			242763 242763	\$50 \$50	06/02/2016 06/02/2016	Gift Gift	1					
		Granny Aching					-					
		Acme Corporation	2148	\$100	01/20/2015	Gift	1					
			23384	\$200	07/27/2016	In-Kind	0					
			23384 23384	\$250 \$20	10/03/2016 10/03/2016	Gift Gift	0					
			23384	\$10	07/01/2016	Gift	0					
		Abigal Adams	23384	\$200	07/15/2016	In-Kind	0					
			423994	\$120	11/22/2016	Gift	1					
			423994	\$10	08/18/2016	Gift	1					
		Alameda County	242807	\$1,500	07/27/2016	Gift	0					
		Bob Amazing					-					
			101143 101143	\$5 \$25	12/01/2015 02/09/2016	Gift	1					
			101143	\$10	09/04/2015	Gift	1					
			101143 101143	\$10 \$100		Gift	1					
			101143	\$0	09/08/2015	Gift	i					
			101143	\$100		Gift	1					
			101143 101143			Gift Gift	1					
		Amee Test Org										
			307464 307464		03/03/2016 03/04/2016	Gift	0					
			307464			Gift	ō					
		Angel's Cove	117321	\$50	02/01/2016	Gift	0					
			117321			Gift	0					
		Jennifer Aniston	444005		000000040	0.8						
			111235 111235			Gift	1					
		Courtney Apple										
			242974 242974		01/31/2016 02/01/2016	Gift	1					
4		Applebee Foods					1					

- 1. You will follow all of the above steps, but we will add an additional Sort option that pulls just the first letter of the Contact Last Name or Organization Name and then we will add an additional Group Header to the report for that first letter sort.
- 2. First, you must add an "if" statement to your Sorts that tells the report to sort by the first letter of Individual Last Name if the contact record type is Individual Contact and to sort by the first letter of Organization Name if the contact record type is an Organization.
- 3. To do this, make sure the "Contacts" category/table is included on your Categories tab (click the gear icon and select Categories).



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- 4. Next, go to the Sorts tab (click the gear icon again and select "Sorts).
- 5. Add the field "Individual or Organization" from the Contact table.

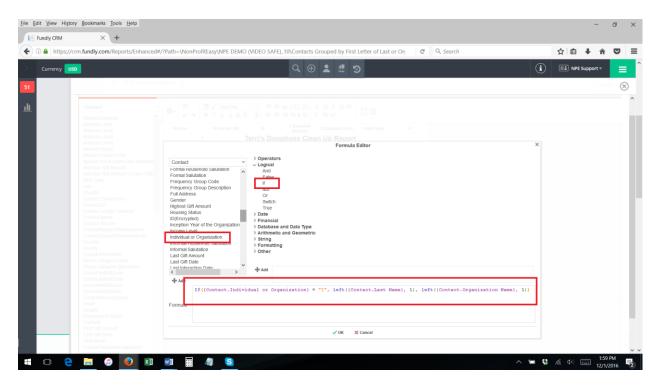


6. Click the "fx" next to the field name in the Sort Order column

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ш	Contacts Grouped by First						0	î
	Contact Adive:Deceased Address_Line1 Address_Line2 Address_Line3 Address_Line4 Addre	Section A (Contact ID)	Terri's Donations Clean Up Rep	ate) E (Gift Type) F	×			
	Appeal Court Since Last Respon Average Cill Amount of Last 4 Cill Birth Date Cill Cill Contract Catalities On Contract Catalities On Contract Catalities On Contract Manne Contract Manne	Contact Contact First Name Formal Subtation Formal Subtation Formal Subtation Forequency Group Description Frequency Group Description Frequency Group Description Formal Subtation Informal Subtation In		Sort By	fr Andra × ∧ ∨ X			
	First Gift Date		🗸 ОК	× Cancel			I:18 PM	~ ~

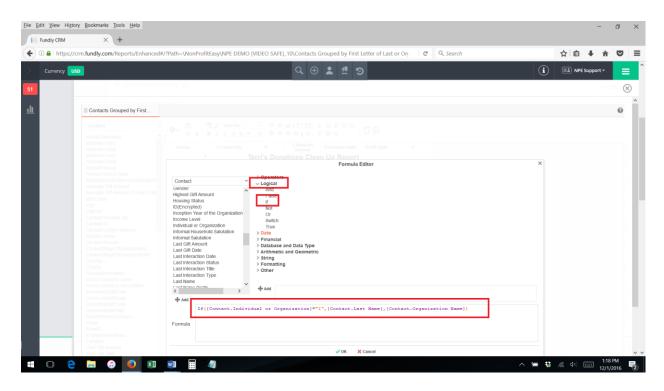
7. Add the following formula (you can type it in, select the "if" function from the function list, or copy and paste from below):

If({Contact.Individual or Organization} = "I", left({Contact.Last Name}, 1), left({Contact.Organization Name}, 1))



- 8. Next, you must add a **second** Sort Order to your Sorts tab that contains an "if" statement that tells the report to sort by the Individual's Last Name if the contact record type is Individual Contact and to sort by Organization name if the contact record type is an Organization.
- 9. Add the following formula (you can type it in, select the "if" function from the function list, or copy and paste from below):

If({Contact.Individual or Organization} = "I", {Contact.Last Name}, {Contact.Organization Name})

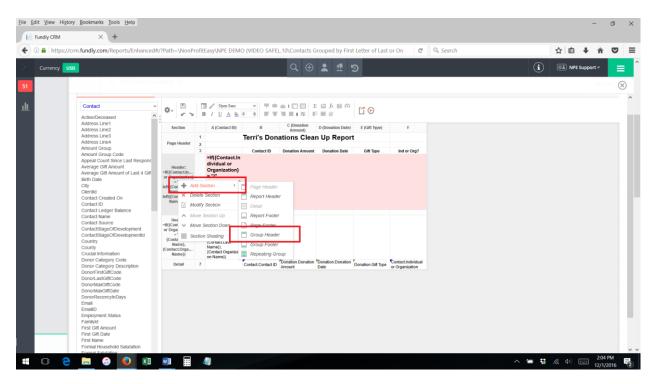


10. Your Sorts should now look like this:

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		Q 🕀 💄 🕊 🤊	i III NPE Support	rt≖	=
	2016 Donor Cate	ag ()		Evenue	\otimes
	Contact ~ Active/Deceased				
	Address Line1 Address Line2	Section A (Contact ID) B C (Domation Amount) D (Donation Date) E (Gift Type) F			
	Address Line3 Address Line4	1 Terri's Donations Clean Up Report	×		
	Amount Group Amount Group Code	Report Sorts Select sort fields			
	Appeal Count Since Last Respons	Sort By Sort Order			
	Average Gift Amount Average Gift Amount of Last 4 Gift	Contact * + =#(Contact Individual or Organization) = 'T', left((Contact Last Name), 1), left((Contact Organization Name), 1)) fr Ascending			
		Active/Deceased A © =III(Contact.Individual or Organization) = Tr. (Contact.Last Name), (Contact.Organization Name)) fx Ascending Address Line1	~ ^ ~ X		
	City Clientid	Address Line2			
	Contact Created On Contact ID	Address Line3 Address Line4			
	Contact Ledger Balance	Amount Group			
	Contact Name Contact Source	Amount Group Code Appeal Count Since Last Respons			
		Average Gift Amount Average Gift Amount of Last 4 Gift			
		Birth Date			
		City Ctientid			
	Donor Category Code	Contact Created On			
		Contact ID Contact Ledger Balance			
	DonorLastGiftCode	Contact Name Contact Source			
		ContactStageOfDevelopment			
		ContactStageOfDevelopmentid Country v			
		+ Add + Add Formula			
		VK X Cancel			

- 11. Click OK
- 12. Next, you will need to add a Group Header to your report to display the Alphebet/Letter Character Section Dividers/Headers.

13. To do this, on your report Layout, right click anywhere in the left column/Section area of the report layout. Select "Add Section" and then "Group Header"



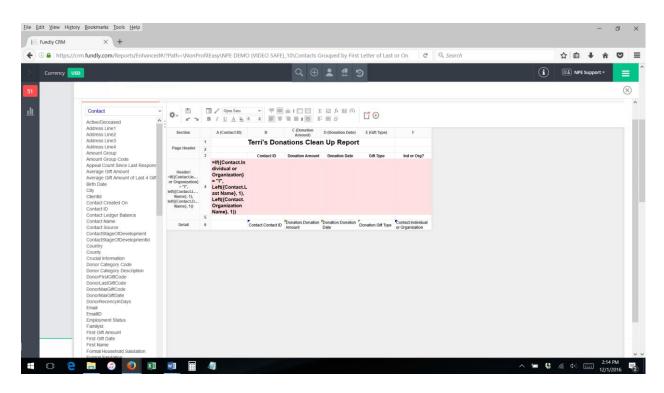
14. Select your first Sort order (the one containing the "Left" command.

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<u>h</u>	Contact ~ Active/Deceased						
		Section	A (Contact ID) B	C (Donation Amount) D (Donation Date) E (Gift Type) F			
Address Line2 Address Line3 Address Line4 Anount Group Anount Group Code Appeal Court Since List Respons Average Git Anount		1 Page Header 2	Terri's D	Donations Clean Up Report			
	Amount Group		Contact	ID Donation Amount Donation Date Gift Type Ind or Org?			
	Appeal Count Since Last Respons		=lf{{Contact.in dividual or				
	Average Gift Amount of Last 4 Gift Birth Date	-II({Contact.In or Organization)	Organization} = "I",				
		+ "T", 4 Jeffi([Contact1, Name], 1),	Left{{Contact.L ast Name}, 1),	Group Footers X			
		Name), 1))	Left({Contact. Organization	Show this group for each change of the following:			
		5	Name], 1)) =III/Contact Individu	Data Categories Contact			
		Header: -If((Contactio or Organization)	at or Organization) = T, Concatenate/(Cont	Sort Fields =If{{Contact.Individual or Organization} = "I", left{{Contact.Last Name}, 1), left{{Contact.Organization Name}, 1)}	1		
		ConfactLast Kame),	act First Name), **, (Contact Last		•		
	County Crucial Information	(Contact.Orga Name))	Nam6)). (Contact Organizati on Name))	viewing are countries and cities. For each country, you may want the total population of all the cities within that country. To do this, you would			
		Detail 7	Contact Can	create a group footer on country, then add the population field from the city category, and click the autosum button. A report can have multiple group footers for varying levels of data.			
				group routers for varying revers of cake.			
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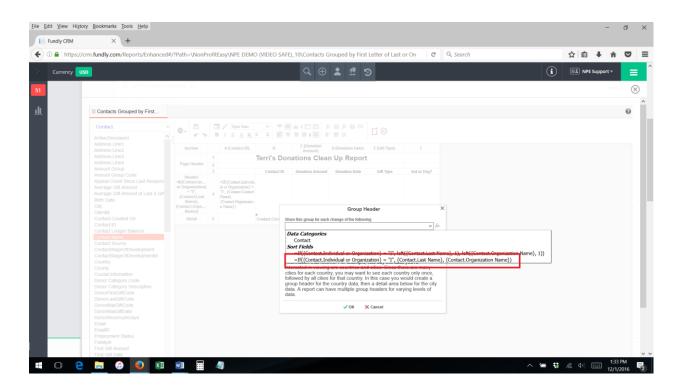
15. Next, in the report Layout, add the following formula in the Group Header row, where you want the Letter Dividers to appear.

If({Contact.Individual or Organization} = "I", left({Contact.Last Name}, 1), left({Contact.Organization Name}, 1))

We have shaded the Alphabet divider row pink in our example report to make it stand out more and Bolded the Alphabet Letters text.



16. You can also add a second group header on the contact name (Individual or Organization) if you want the name to only appear once. Repeat the above step to add a second Group Header and select the second formula.



- 17. Finally, on the final report output/display, you will want to have one column that displays "Name" and which displays the individual's First and Last Name if the contact record type is Individual and the Organization Name if the contact record type is organization.
- 18. To do this, on the report Layout, click in the cell where you want the "name" field to appear (in the second group header if you have added it, otherwise, in the details area). Copy and paste the following formula (or type it in/use the fx/formula editor to add it):

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	Amount Group Amount Group Code	Page Header	2 3	Contact ID	Donation Amoun	t Donation Date	Gift Type	Ind or Org?				
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		Header: -If({Contact.ln or Organization} = "!", {Contact.Last Name}, {Contact.Orga Name})	=III(Contact India/ al or Organization = T', Concatenate((Cor act First Name), (Contact Last Name)), (Contact Organiza on Name))) nt -,								
	Donor Category Code Donor Category Description	Detail	7	Contact Contact IE	Donation Donation Amount	Donation.Donation	Donation.Gift Type	Contact Individual or Organization				
	DonorfisitälinGode DonortasistinGode DonortasistinGode DonortasistinGode DonortasistinGode DonortasistinGode Email Emaili Emaili Emaili Emailio Employment Status Familyid Fisits Qit Anount Fisit Qit Date Fisits Name											

=If({Contact.Individual or Organization} = "I", {Contact.Contact Name}, {Contact.Organization Name})

19. Now when you run the report it will sort Organizations and Individuals together and display the "name" in one column and the sections will have Alphabet Letter Headers/Dividers.

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		Ades Ababa											
				\$500 \$50	01/28/2016 06/02/2016	Gift Gift	1						
		Granny Aching		\$50 \$100	06/02/2016	Gift	1						
		Acme Corporation		\$200	07/27/2016	In-Kind	0						
			23384 23384	\$250 \$20	10/03/2016 10/03/2016	Gift	0						
				\$10 \$200	07/01/2016 07/15/2016	Gift In-Kind	0						
		Abigal Adams	423994	\$120	11/22/2016	Gift	1						
		Alameda County		\$10 \$1,500	08/18/2016	Gift	0						
		Bob Amazing		\$5	12/01/2015	Gift	1						
			101143	\$25 \$10	02/09/2016 09/04/2015	Gift Gift	1						
			101143	\$10 \$100	02/09/2016	Gift Gift	1						
			101143	\$0 \$100	09/08/2015	Gift	1						
			101143	\$45	12/01/2015	Gift Gift	1						
		Amee Test Org		\$100		Gift	0						
			307464	\$555	03/04/2016	Gift	0						
		Angel's Cove				Gift	0						1
			117321 117321	\$50 \$100	02/01/2016 11/30/2015	Gift	0						
		Jennifer Aniston	111235	\$20	09/06/2016	Gift	1						
		Courtney Apple	111235		11/22/2016	Gift	1						
		Country Appre	242974 242974	\$500 \$500	01/31/2016 02/01/2016	Gift Gift	1						
		Applebee Foods	2429/4	500	02/01/2010	OIIL	1						