

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:

The screenshot shows a web browser window displaying the Fundly CRM interface. The main content area shows a report titled "Ierrr's Donations Clean Up Report". The report is a table with the following columns: Contact ID, Donation Amount, Donation Date, Gift Type, and Ind or Org?. The data is sorted alphabetically by contact name. The contacts listed include Ades Ababa, Granny Aching, Acme Corporation, Abigail Adams, Alameda County, Bob Amazing, Amex Test Org, Angel's Core, Jennifer Aniston, Courthey Apple, and Applebee Foods. Each contact has one or more rows of donation data.

Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?
A				
Ades Ababa				
242763	\$500	01/28/2016	Gift	I
242763	\$50	06/03/2016	Gift	I
242763	\$50	06/03/2016	Gift	I
Granny Aching				
2148	\$100	01/20/2015	Gift	I
Acme Corporation				
23384	\$200	07/27/2016	In-Kind	O
23384	\$250	10/03/2016	Gift	O
23384	\$20	10/03/2016	Gift	O
23384	\$10	07/01/2016	Gift	O
23384	\$200	07/15/2016	In-Kind	O
Abigail Adams				
423994	\$120	11/22/2016	Gift	I
423994	\$10	08/18/2016	Gift	I
Alameda County				
242807	\$1,500	07/27/2016	Gift	O
Bob Amazing				
101143	\$5	12/01/2015	Gift	I
101143	\$25	02/09/2016	Gift	I
101143	\$10	09/04/2015	Gift	I
101143	\$10	02/09/2016	Gift	I
101143	\$100	12/02/2015	Gift	I
101143	\$0	06/08/2015	Gift	I
101143	\$100	09/02/2015	Gift	I
101143	\$45	12/01/2015	Gift	I
101143	\$100	09/28/2015	Gift	I
Amex Test Org				
307464	\$10	03/03/2016	Gift	O
307464	\$555	03/04/2016	Gift	O
307464	\$800	03/04/2016	Gift	O
Angel's Core				
117321	\$50	02/01/2016	Gift	O
117321	\$100	11/30/2015	Gift	O
Jennifer Aniston				
111235	\$20	06/06/2016	Gift	I
111235	\$12	11/23/2016	Gift	I
Courthey Apple				
242074	\$500	01/31/2016	Gift	I
242074	\$500	02/01/2016	Gift	I
Applebee Foods				

For a Report That Just Sorts by Name WITHOUT the Letter (A, B, C, etc.) Headers/Separators (for example, for a mailing list report):

The screenshot shows a web browser window displaying a report in Fundly CRM. The report title is "Terri's Donations Clean Up Report". The table contains the following data:

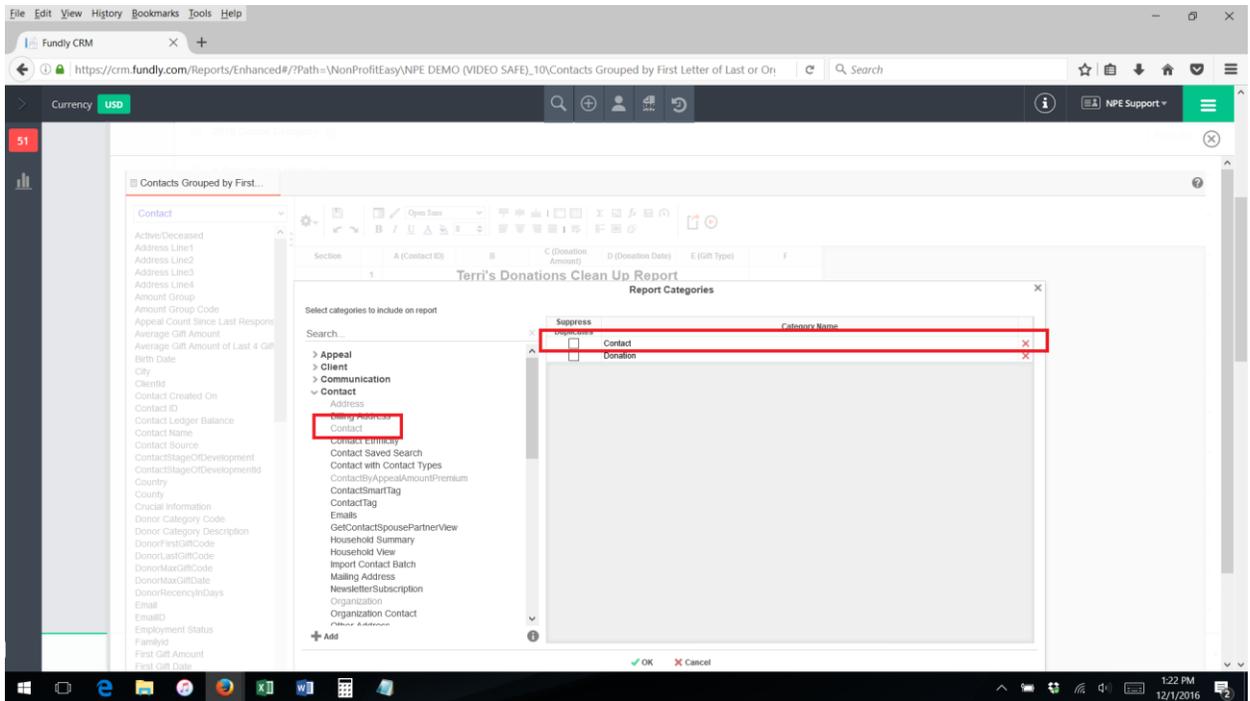
Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?
Ades Ababa 242763	\$500	01/28/2016	Gift	I
Ades Ababa 242763	\$50	06/02/2016	Gift	I
Ades Ababa 242763	\$50	06/02/2016	Gift	I
Granny Achong 2148	\$100	01/20/2015	Gift	I
Acme Corporation 23384	\$200	07/27/2016	Its Kind	O
Acme Corporation 23384	\$250	10/03/2016	Gift	O
Acme Corporation 23384	\$20	10/03/2016	Gift	O
Acme Corporation 23384	\$10	07/01/2016	Gift	O
Acme Corporation 23384	\$200	07/15/2016	Its Kind	O
Ms. Abigail Adams 423994	\$120	11/22/2016	Gift	I
Ms. Abigail Adams 423994	\$10	08/19/2016	Gift	I
Alameda County 242807	\$1,500	07/27/2016	Gift	O
Bob Amazing 101143	\$5	12/01/2015	Gift	I
Bob Amazing 101143	\$25	02/09/2016	Gift	I
Bob Amazing 101143	\$10	09/04/2015	Gift	I
Bob Amazing 101143	\$10	02/09/2016	Gift	I
Bob Amazing 101143	\$100	12/02/2015	Gift	I
Bob Amazing 101143	\$0	09/06/2015	Gift	I
Bob Amazing 101143	\$100	09/28/2015	Gift	I
Bob Amazing 101143	\$45	12/01/2015	Gift	I
Bob Amazing 101143	\$100	09/29/2015	Gift	I
Anne Test Org 307464	\$10	03/03/2016	Gift	O
Anne Test Org 307464	\$555	03/04/2016	Gift	O
Anne Test Org 307464	\$800	03/04/2016	Gift	O
Angel's Cove 117321	\$50	02/01/2016	Gift	O
Angel's Cove 117321	\$100	11/30/2015	Gift	O
Jennifer Anstom 111235	\$20	09/09/2016	Gift	I
Jennifer Anstom 111235	\$12	11/22/2016	Gift	I
Dr. Courtney Apple 242974	\$500	01/31/2016	Gift	I
Dr. Courtney Apple 242974	\$500	02/01/2016	Gift	I
Apples Feed Inc 180553	\$200	01/21/2016	Gift	O
Ms. Terri Agrano 381819	\$20	11/09/2016	Gift	I
Ms. Terri Agrano 381819	\$20	07/11/2016	Gift	I

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).

The screenshot shows the configuration interface for the report. On the left, a list of fields is shown, including "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", and "First Gift Date".

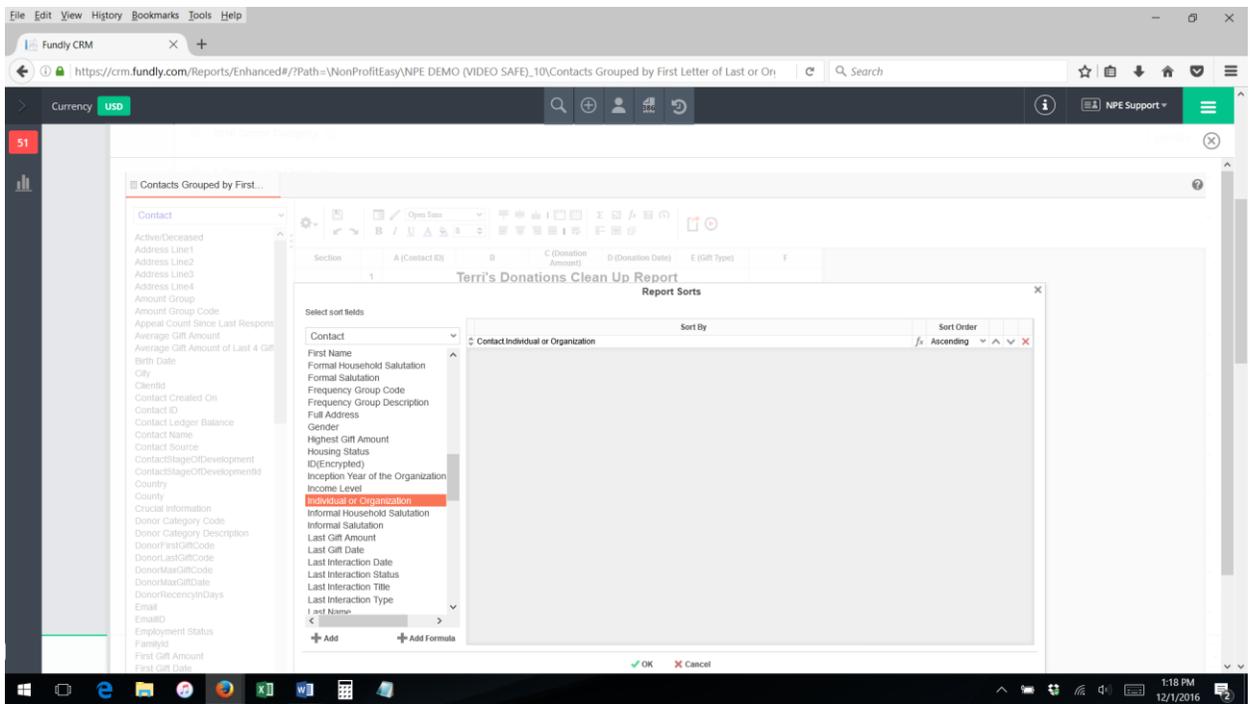
In the center, a table titled "Terri's Donations Clean Up Report" is shown with columns: Contact ID, Donation Amount, Donation Date, Donation, and Gift Type. The "Sorts" section shows a filter: "if(Contact Individual or Organization) = 'I', Concatenate(Contact First Name, (Contact Last Name))". The "Advanced" section shows "Contact Organization Name".

At the bottom, the "Categories" tab is selected, showing a list of fields and their corresponding report columns: Detail, 5, Contact Contact ID, Donation Amount, Donation Date, Donation, Donation, Donation, Gift Type, and Contact Individual or Organization.

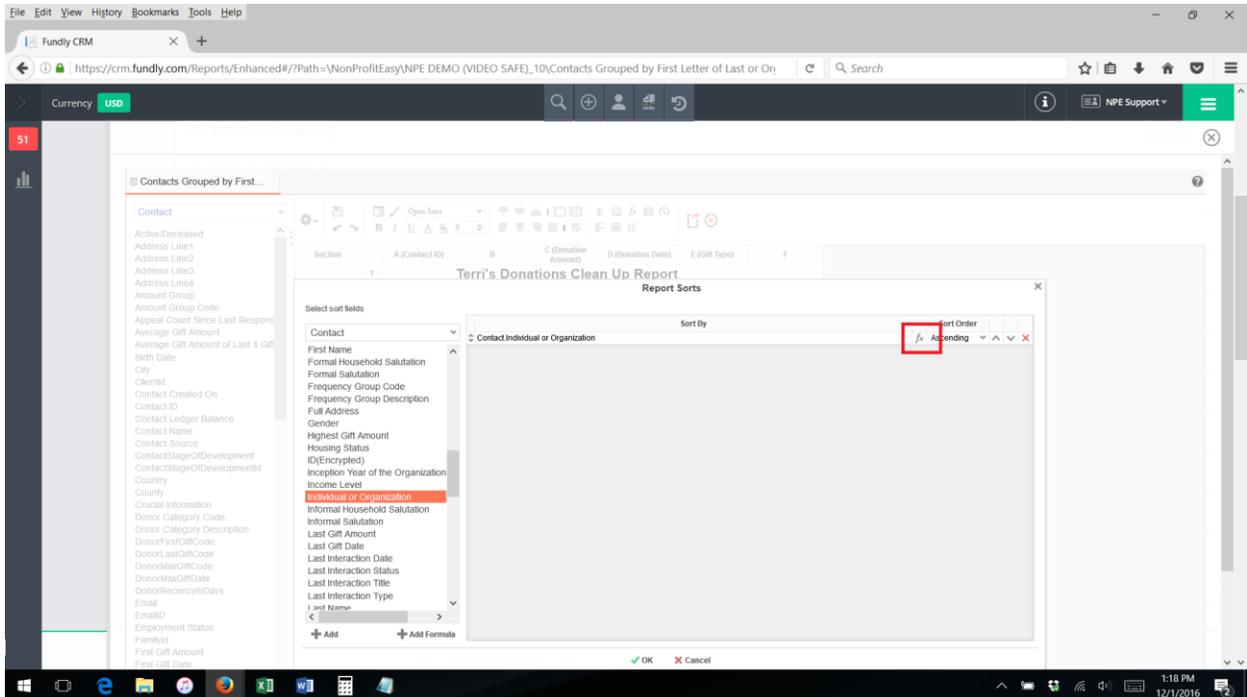


4. Next, go to the Sorts tab (click the gear icon again and select "Sorts").

5. Add the field "Individual or Organization" from the Contact table.

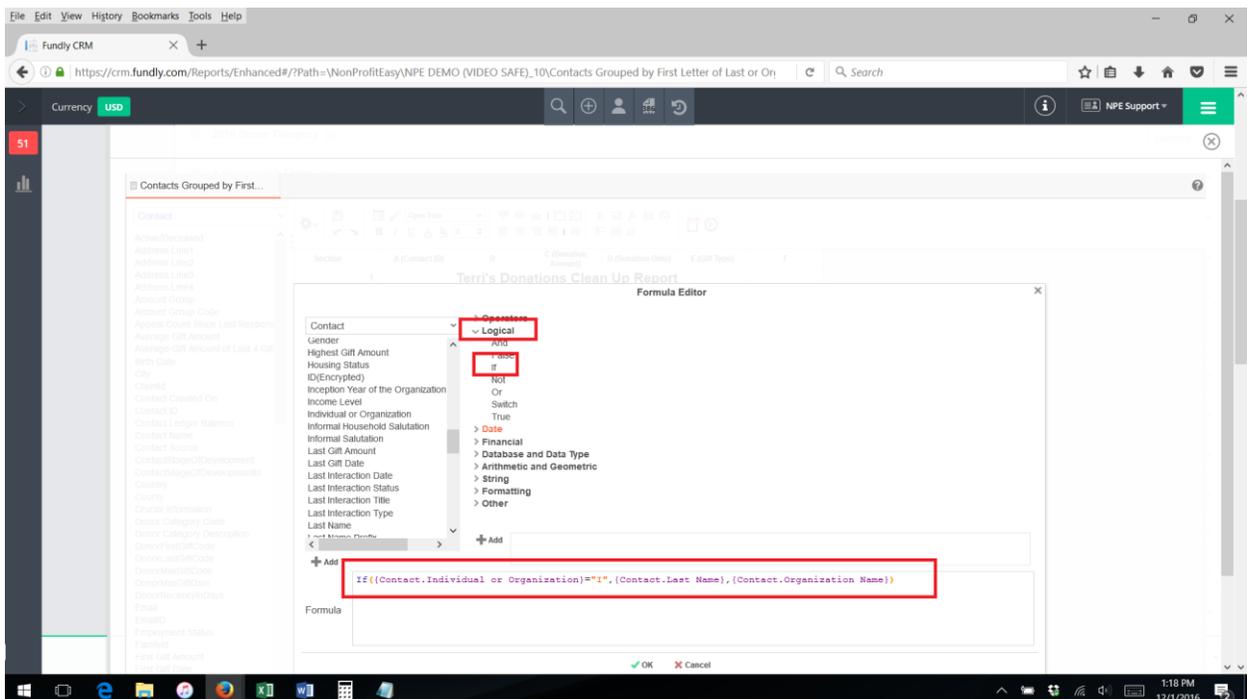


6. Click the “fx” next to the field name in the Sort Order column



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

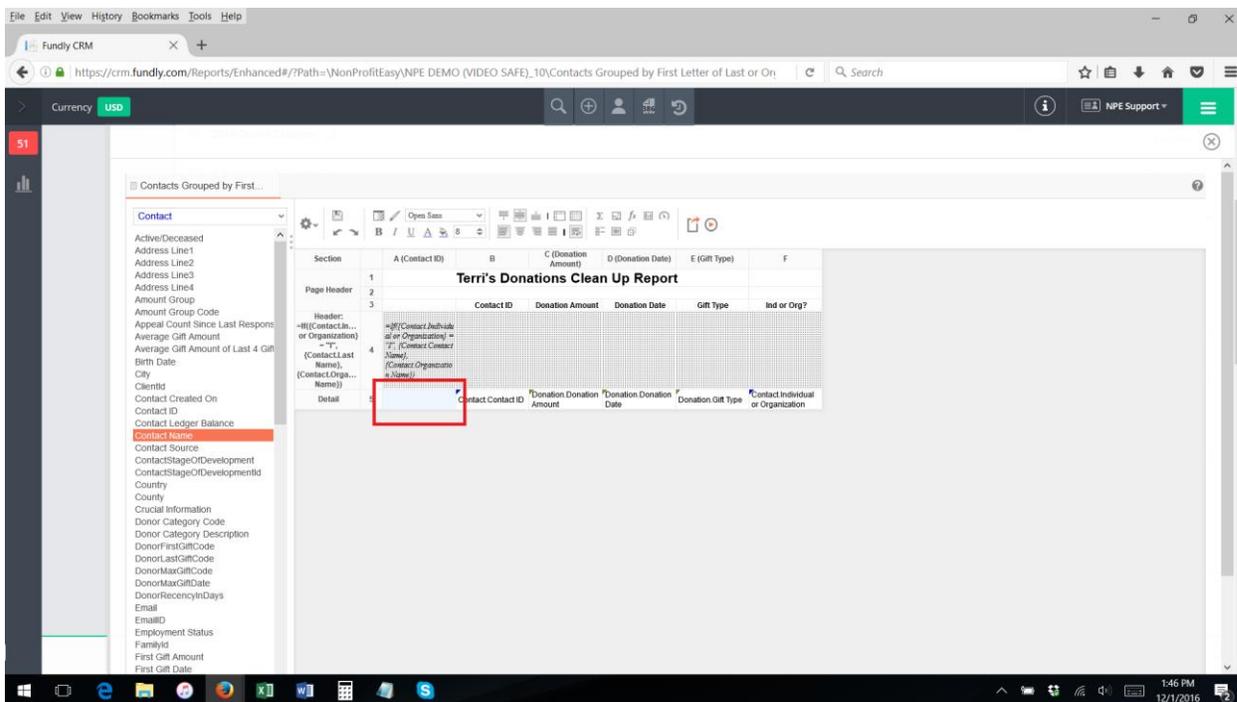
If({Contact.Individual or Organization} = "I", {Contact.Last Name}, {Contact.Organization Name})



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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Fundly CRM

https://crm.fundly.com/Reports/Enhanced#/Path=NonProfitEasy/NPE DEMO (VIDEO SAFE)_10/Contacts Grouped by First Letter of Last or Or...

Currency USD

Contacts Grouped by First... | Contacts Grouped by First...

Terri's Donations Clean Up Report

Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?	
Aden Ababa	242763	\$500	01/28/2016	Gift	I
Aden Ababa	242763	\$50	06/02/2016	Gift	I
Aden Ababa	242763	\$50	06/02/2016	Gift	I
Granny Adams	2148	\$100	01/20/2015	Gift	I
Acme Corporation	23384	\$200	07/27/2016	In-Kind	O
Acme Corporation	23384	\$250	10/03/2016	Gift	O
Acme Corporation	23384	\$20	10/03/2016	Gift	O
Acme Corporation	23384	\$10	07/01/2016	Gift	O
Acme Corporation	23384	\$200	07/15/2016	In-Kind	O
Ms. Abigail Adams	423994	\$120	11/22/2016	Gift	I
Ms. Abigail Adams	423994	\$10	08/18/2016	Gift	I
Alameda County	242807	\$1,500	07/27/2016	Gift	O
Bob Amazing	101143	\$5	12/01/2015	Gift	I
Bob Amazing	101143	\$25	02/09/2016	Gift	I
Bob Amazing	101143	\$10	09/04/2015	Gift	I
Bob Amazing	101143	\$10	02/09/2016	Gift	I
Bob Amazing	101143	\$100	12/02/2015	Gift	I
Bob Amazing	101143	\$0	08/08/2015	Gift	I
Bob Amazing	101143	\$100	09/28/2015	Gift	I
Bob Amazing	101143	\$45	12/01/2015	Gift	I
Bob Amazing	101143	\$100	09/28/2015	Gift	I
Anne Test Org	307464	\$10	03/03/2016	Gift	O
Anne Test Org	307464	\$555	03/04/2016	Gift	O
Anne Test Org	307464	\$900	03/04/2016	Gift	O
Angel's Cove	117321	\$50	03/01/2016	Gift	O
Angel's Cove	117321	\$100	11/30/2015	Gift	O
Jennifer Aniston	111235	\$20	09/06/2016	Gift	I
Jennifer Aniston	111235	\$12	11/22/2016	Gift	I
Dr. Courtney Apple	242974	\$500	01/31/2016	Gift	I
Dr. Courtney Apple	242974	\$500	02/01/2016	Gift	I
Applesauce Foods Inc.	180953	\$200	01/21/2016	Gift	O
Ms. Terri Agnew	381819	\$20	11/09/2016	Gift	I
Ms. Terri Agnew	381819	\$20	07/11/2016	Gift	I

1:40 PM 12/1/2016

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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Fundly CRM

https://crm.fundly.com/Reports/Enhanced#/Path=NonProfitEasy/NPE DEMO (VIDEO SAFE)_10/Contacts Grouped by First Letter of Last or Or...

Currency USD

Contacts Grouped by First...

Terri's Donations Clean Up Report

Group Header

Show this group for each change of the following

Data Categories

Contact

Sort Fields

$=IF((Contact.Individual or Organization) = "I", LEFT((Contact.Last Name), 1))$

OK Cancel

1:39 PM 12/1/2016

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

The screenshot shows the Fundly CRM interface for configuring a report. The report title is "Terri's Donations Clean Up Report". The configuration table is as follows:

Section	A (Contact ID)	B	C (Donation Amount)	D (Donation Date)	E (Gift Type)	F
Page Header	1					
Header	2					
Detail	3	*Contact Contact ID	*Donation Amount	*Donation Date	*Donation Gift Type	*Contact Individual or Organization
Header	4	=IF(Contact Individual or Organization) = 'I', (Contact Name), (Contact Organization Name)				

The screenshot shows the final report output. The report title is "Terri's Donations Clean Up Report". The data is grouped by contact name. The table content is as follows:

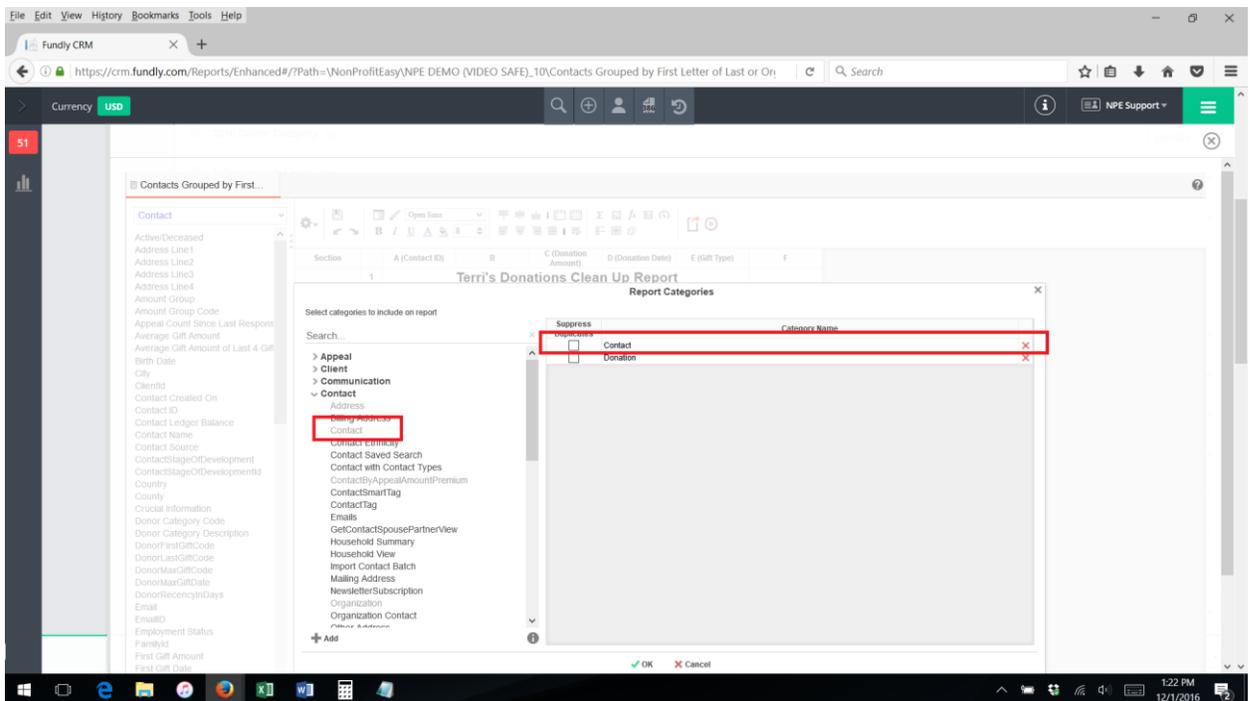
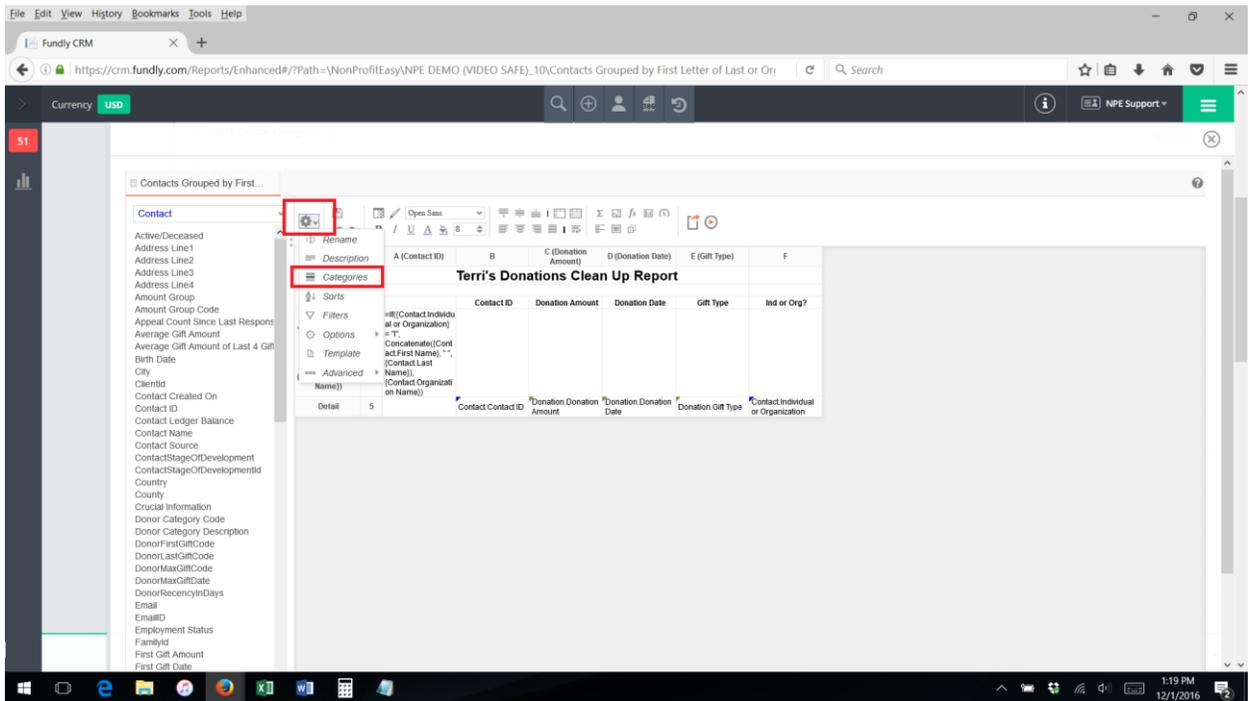
Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?
Ades Ababa				
242763	\$500	01/28/2016	Gift	I
242763	\$50	06/02/2016	Gift	I
242763	\$50	06/02/2016	Gift	I
Granny Achang				
2148	\$100	01/20/2015	Gift	I
Acme Corporation				
23384	\$200	07/27/2016	In-Kind	O
23384	\$250	10/03/2016	Gift	O
23384	\$20	10/03/2016	Gift	O
23384	\$10	07/01/2016	Gift	O
23384	\$200	07/15/2016	In-Kind	O
Ms. Ahgal Adams				
423994	\$120	11/23/2016	Gift	I
423994	\$10	08/18/2016	Gift	I
Alameda County				
242807	\$1,500	07/27/2016	Gift	O
Bob Amazing				
101143	\$5	12/01/2015	Gift	I
101143	\$25	02/09/2016	Gift	I
101143	\$10	09/04/2015	Gift	I
101143	\$10	02/09/2016	Gift	I
101143	\$100	12/02/2015	Gift	I
101143	\$0	09/09/2015	Gift	I
101143	\$100	09/28/2015	Gift	I
101143	\$45	12/01/2015	Gift	I
101143	\$100	09/28/2015	Gift	I
Anne Test Org				
307464	\$10	03/03/2016	Gift	O
307464	\$55	03/04/2016	Gift	O
307464	\$800	03/04/2016	Gift	O
Angel's Cove				
117321	\$50	02/01/2016	Gift	O
117321	\$100	11/30/2015	Gift	O
Jennifer Amint				
111235	\$20	09/06/2016	Gift	I
111235	\$12	11/22/2016	Gift	I

For a Report That Sorts by Name WITH Letter (A, B, C, etc.) Headers/Separators:

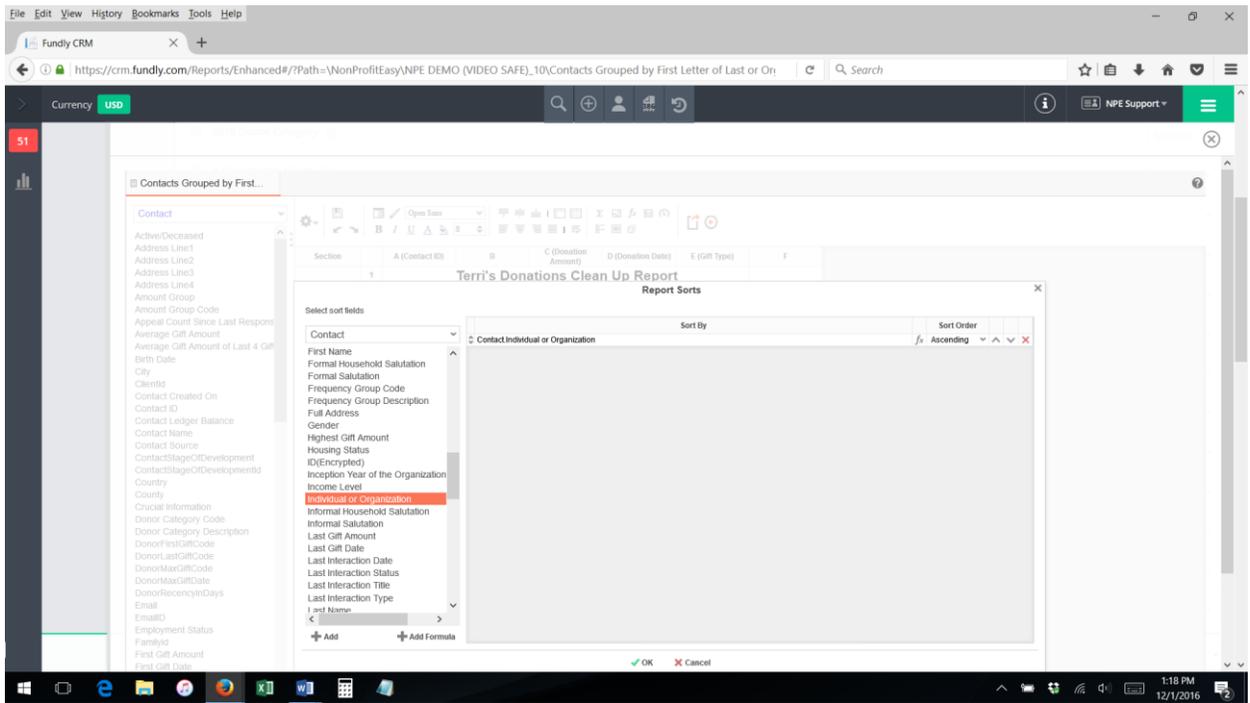
The screenshot shows a web browser window displaying the Fundly CRM interface. The main content area shows a report titled "Jerrri's Donations Clean Up Report". The report is sorted by contact name, with a group header "A" at the top. The data is presented in a table with the following columns: Contact ID, Donation Amount, Donation Date, Gift Type, and Ind or Org?.

Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?
A				
Ades Ababa				
242763	\$500	01/28/2016	Gift	I
242763	\$50	06/02/2016	Gift	I
242763	\$50	06/02/2016	Gift	I
Granny Aching				
2148	\$100	01/20/2015	Gift	I
Acme Corporation				
23384	\$200	07/27/2016	In-Kind	O
23384	\$250	10/03/2016	Gift	O
23384	\$20	10/03/2016	Gift	O
23384	\$10	07/01/2016	Gift	O
23384	\$200	07/15/2016	In-Kind	O
Abigail Adams				
423994	\$120	11/22/2016	Gift	I
423994	\$10	08/18/2016	Gift	I
Alameda County				
242807	\$1,500	07/27/2016	Gift	O
Bob Amazing				
101143	\$5	12/01/2015	Gift	I
101143	\$25	02/09/2016	Gift	I
101143	\$10	09/04/2015	Gift	I
101143	\$10	02/09/2016	Gift	I
101143	\$100	12/02/2015	Gift	I
101143	\$0	09/08/2015	Gift	I
101143	\$100	09/28/2015	Gift	I
101143	\$45	12/01/2015	Gift	I
101143	\$100	09/28/2015	Gift	I
Amee Test Org				
307464	\$10	03/03/2016	Gift	O
307464	\$555	03/04/2016	Gift	O
307464	\$800	03/04/2016	Gift	O
Angel's Cove				
117321	\$50	02/01/2016	Gift	O
117321	\$100	11/30/2015	Gift	O
Jennifer Aniston				
111235	\$20	06/06/2016	Gift	I
111235	\$12	11/22/2016	Gift	I
Courtney Apple				
242974	\$500	01/31/2016	Gift	I
242974	\$500	02/01/2016	Gift	I
Applebee Foods				

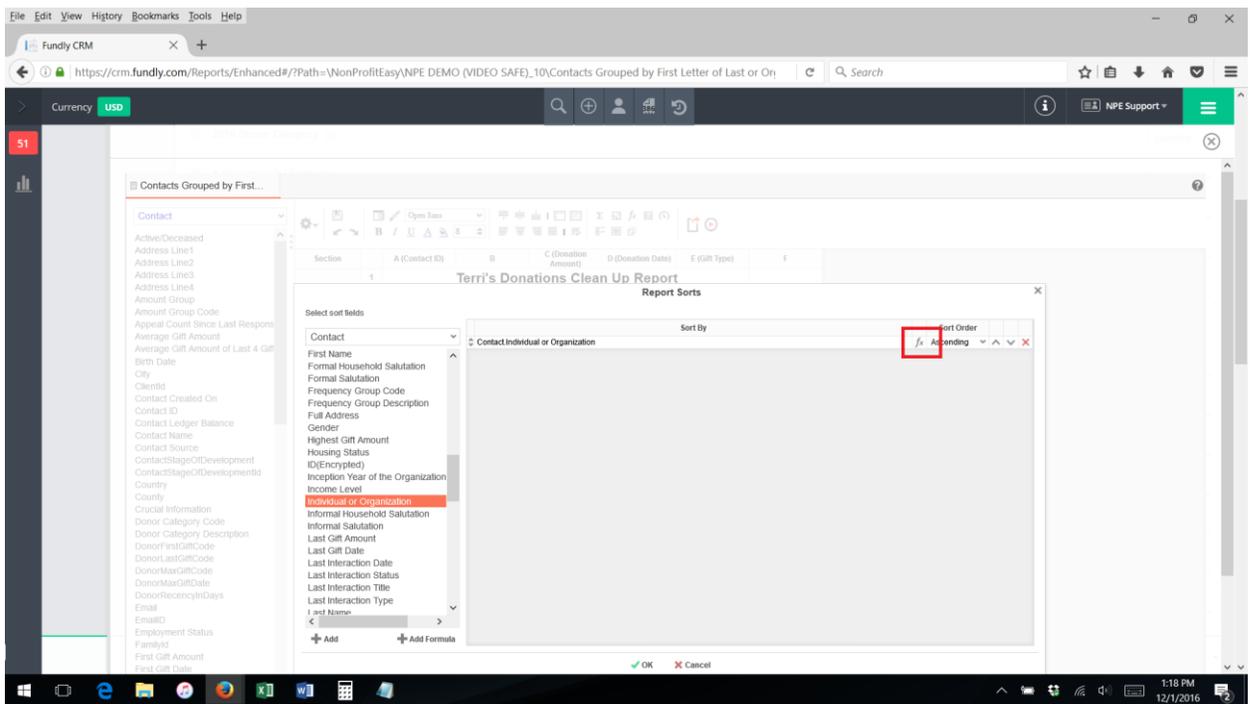
1. You will follow all of the above steps, but we will add an additional Sort option that pulls just the first letter of the Contact Last Name or Organization Name and then we will add an additional Group Header to the report for that first letter sort.
2. First, you must add an "if" statement to your 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).



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.

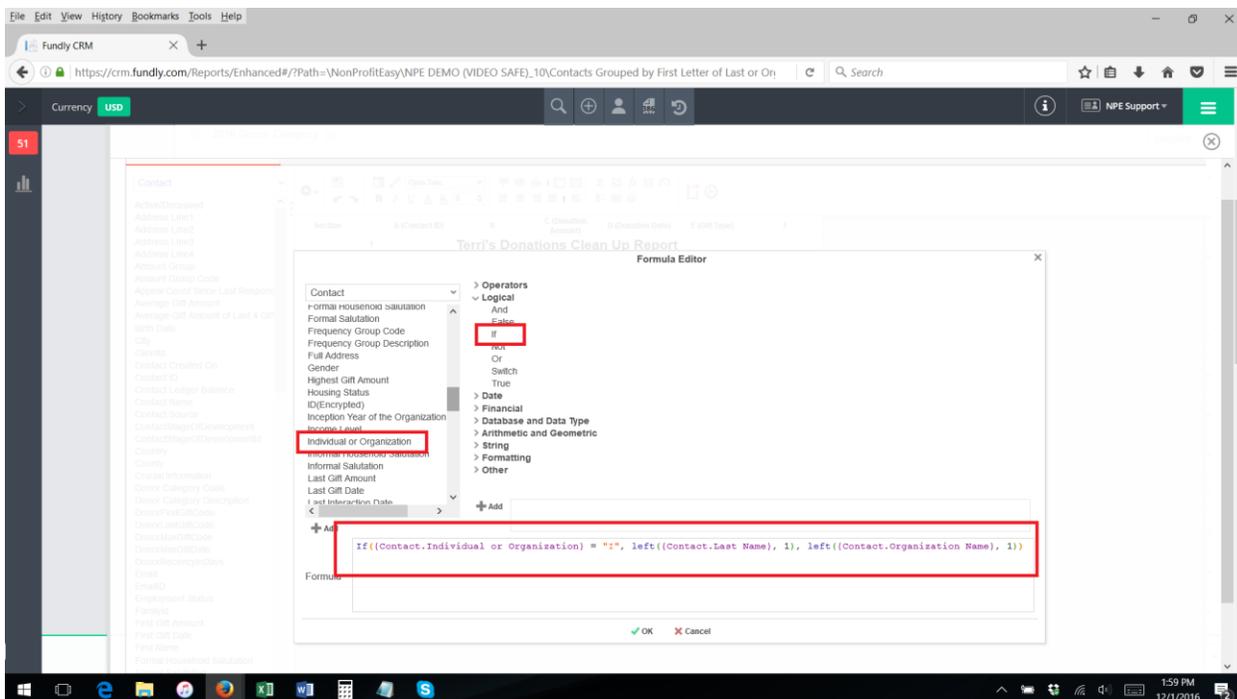


6. Click the “fx” next to the field name in the Sort Order column



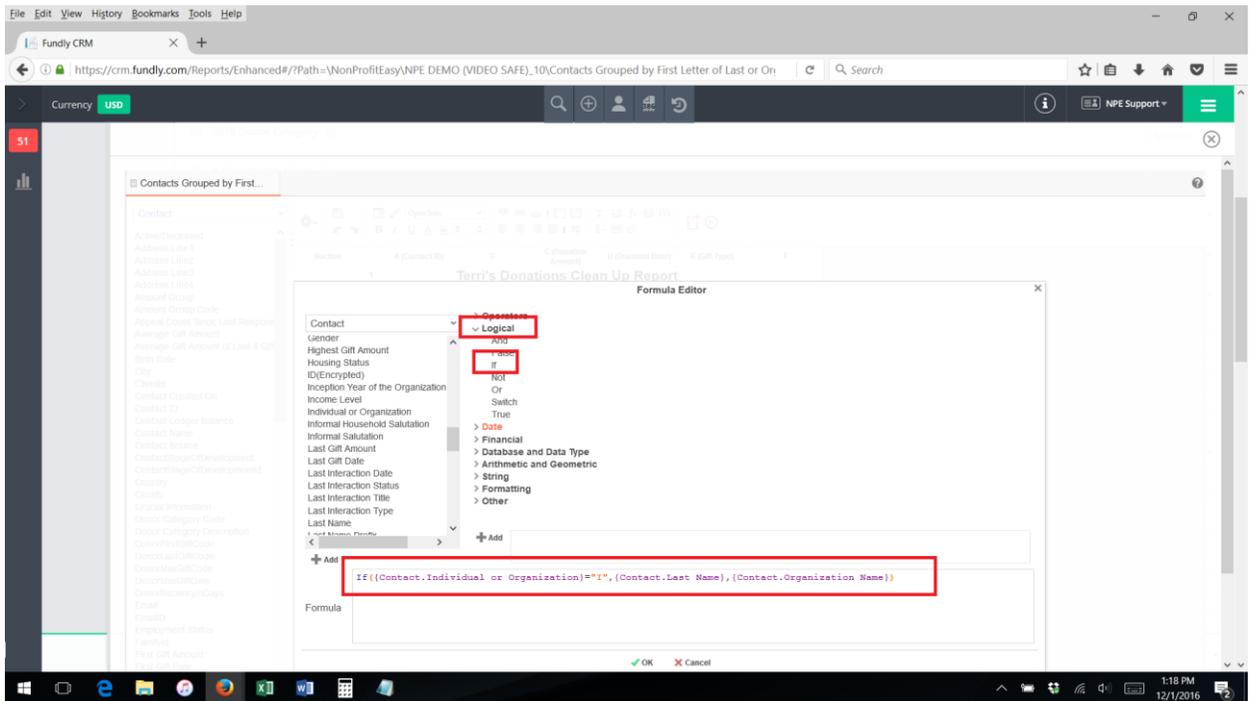
7. Add the following formula (you can type it in, select the “if” function from the function list, or copy and paste from below):

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

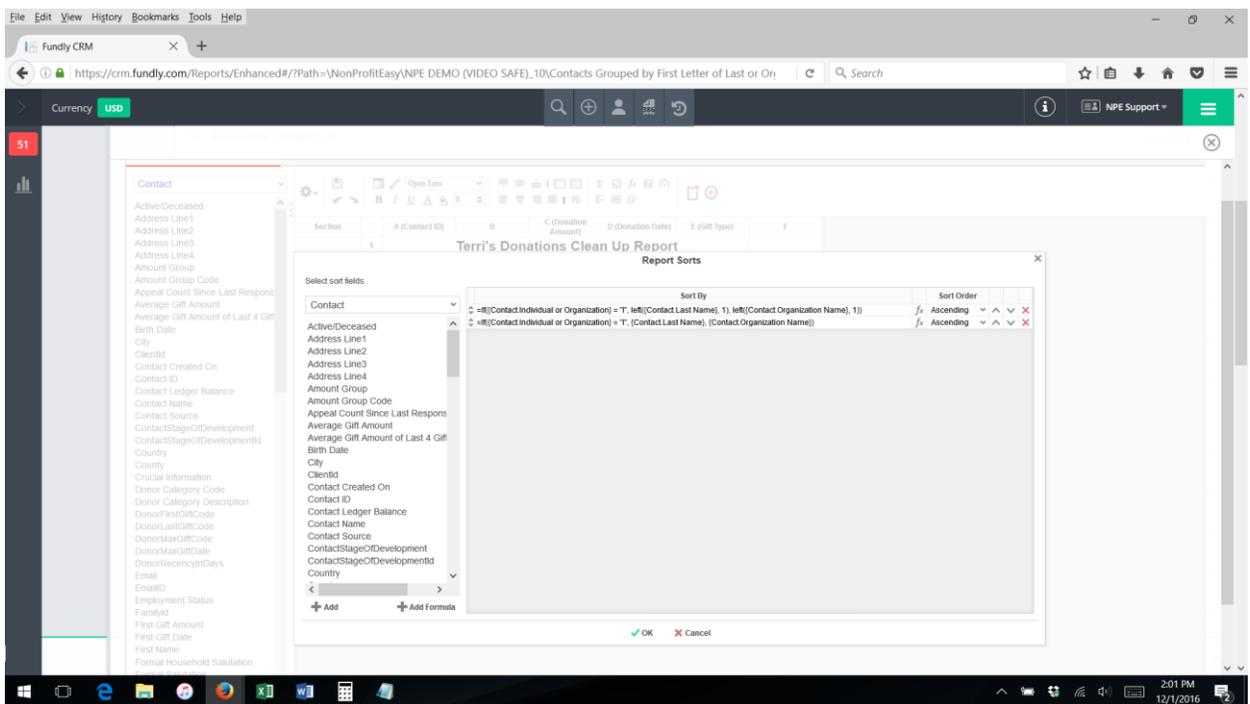


8. Next, you must add a **second** Sort Order to your Sorts tab that contains an “if” statement that tells the report to sort by the Individual’s Last Name if the contact record type is Individual Contact and to sort by Organization name if the contact record type is an Organization.
9. Add the following 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})



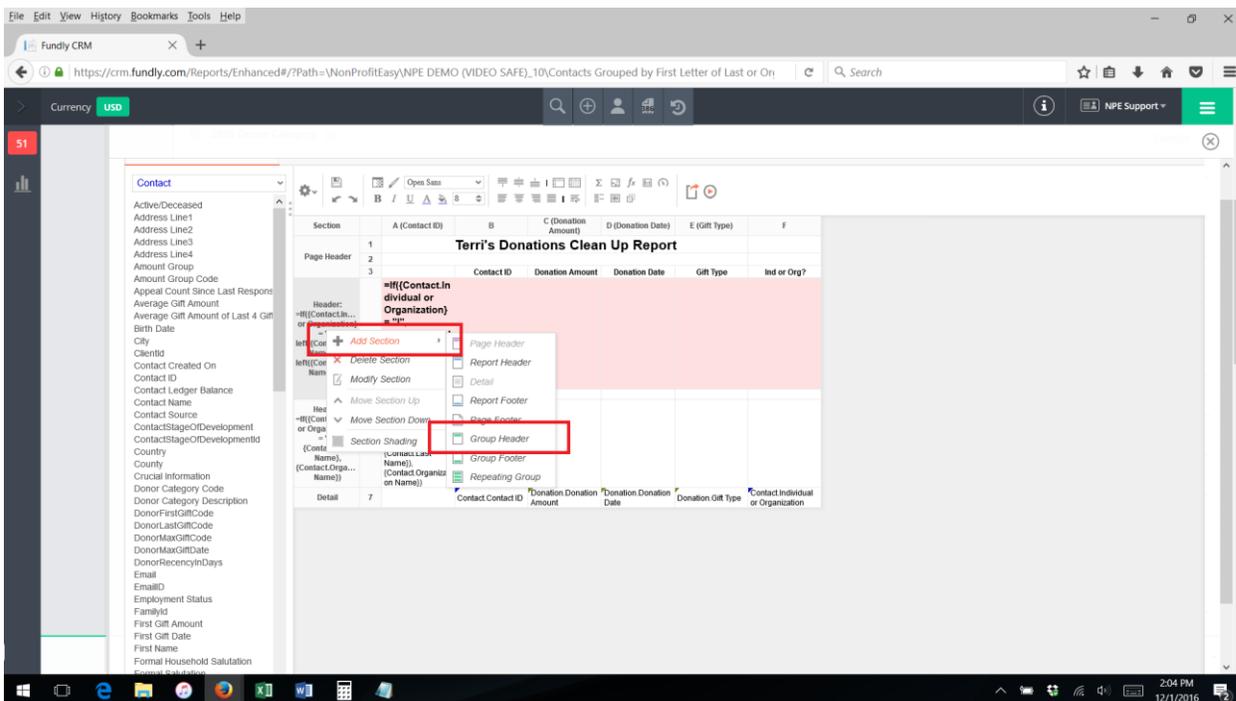
10. Your Sorts should now look like this:



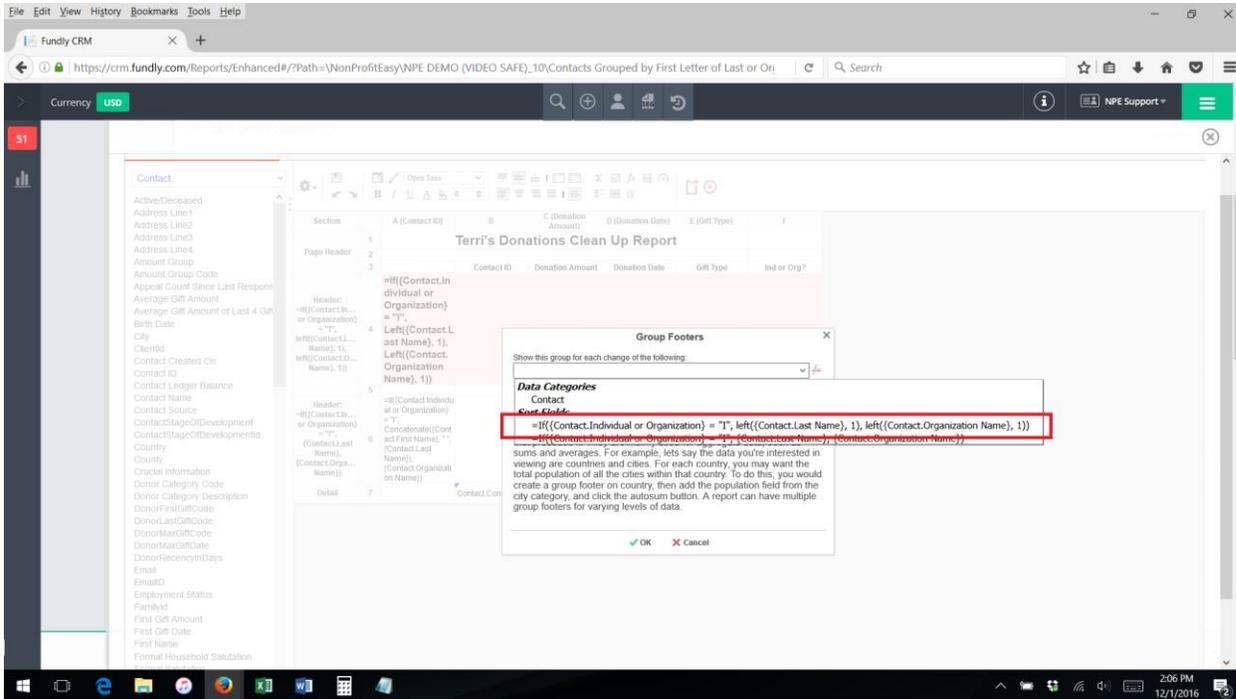
11. Click OK

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”



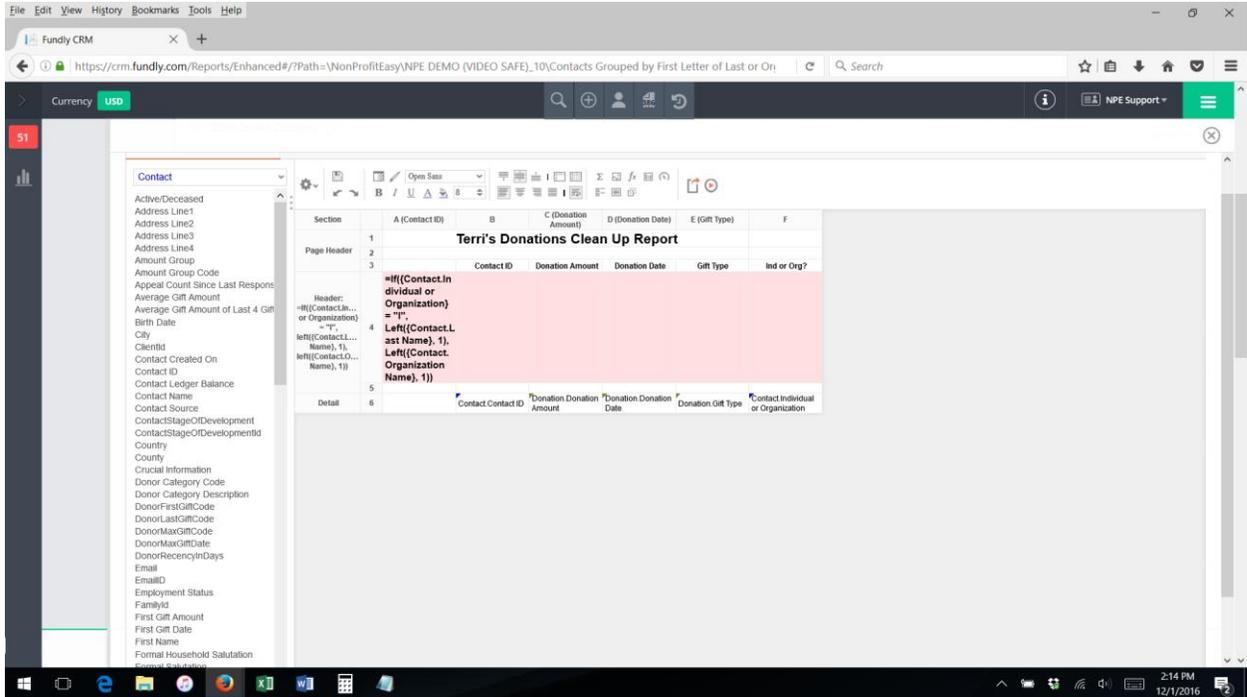
14. Select your first Sort order (the one containing the “Left” command).



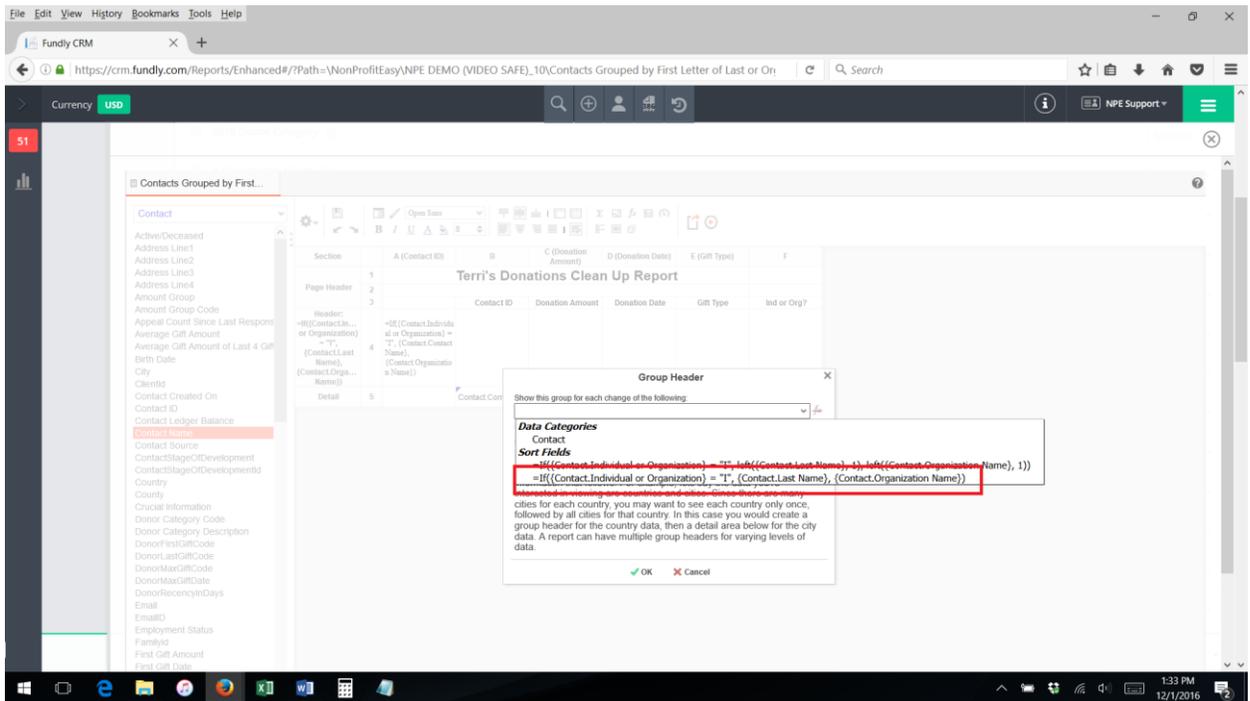
15. Next, in the report Layout, add the following formula in the Group Header row, where you want the Letter Dividers to appear.

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.



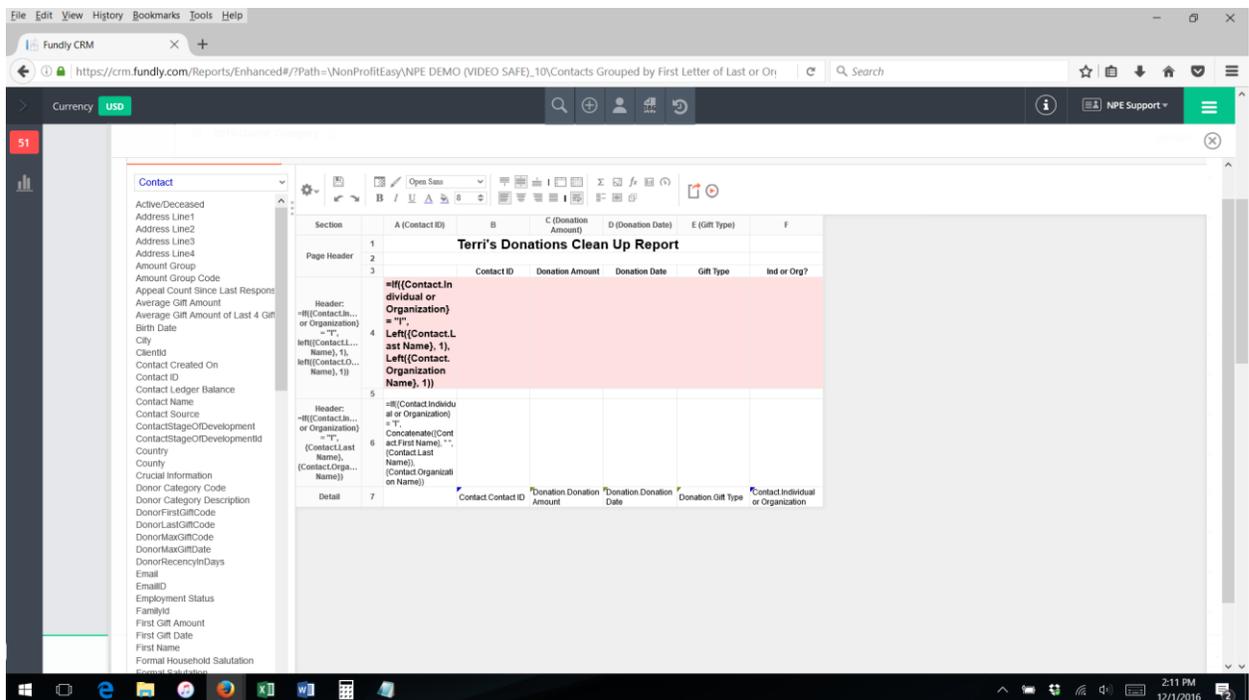
16. You can also add a second group header on the contact name (Individual or Organization) if you want the name to only appear once. Repeat the above step to add a second Group Header and select the second formula.



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):

=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.

The screenshot displays the Fundly CRM interface with a report titled "Terri's Donations Clean Up Report". The report is presented as a table with the following columns: Contact ID, Donation Amount, Donation Date, Gift Type, and Ind or Org?. The data is organized into sections, with the first section starting with an "A" header. The contacts and their respective donation details are as follows:

Contact Name	Contact ID	Donation Amount	Donation Date	Gift Type	Ind or Org?
A					
Ades Ababa	242763	\$500	01/28/2016	Gift	I
	242763	\$50	06/02/2016	Gift	I
	242763	\$50	06/02/2016	Gift	I
Granny Aching	2148	\$100	01/20/2015	Gift	I
Acme Corporation	23384	\$200	07/27/2016	In-Kind	O
	23384	\$250	10/03/2016	Gift	O
	23384	\$20	10/03/2016	Gift	O
	23384	\$10	07/01/2016	Gift	O
	23384	\$200	07/15/2016	In-Kind	O
Abigail Adams	423994	\$120	11/22/2016	Gift	I
	423994	\$10	08/18/2016	Gift	I
Alameda County	242807	\$1,500	07/27/2016	Gift	O
Bob Amazing	101143	\$5	12/01/2015	Gift	I
	101143	\$25	02/09/2016	Gift	I
	101143	\$10	09/04/2015	Gift	I
	101143	\$10	02/09/2016	Gift	I
	101143	\$100	12/02/2015	Gift	I
	101143	\$0	09/08/2015	Gift	I
	101143	\$100	09/28/2015	Gift	I
	101143	\$45	12/01/2015	Gift	I
Amee Test Org	307464	\$10	03/03/2016	Gift	O
	307464	\$555	03/04/2016	Gift	O
	307464	\$800	03/04/2016	Gift	O
Angel's Cove	117321	\$50	02/01/2016	Gift	O
	117321	\$100	11/30/2015	Gift	O
Jennifer Aniston	111235	\$20	09/06/2016	Gift	I
	111235	\$12	11/22/2016	Gift	I
Courtney Apple	242974	\$500	01/31/2016	Gift	I
	242974	\$500	02/01/2016	Gift	I
Applebee Foods					