

Year-over-year giving

Monday, March 29, 2021 9:33 AM

QUERY - "HJ UnRes Giving By Year"

- You may need to add additional columns for your purposes.

1. Criteria Records with Total Giving > \$0
 - a. Funds - select funds
 - i. HJGIVECARD
 - ii. HJ-SPONSOR
 - iii. HJUNCWF
 - iv. HJUNRES
 - v. JRS
 - b. Giving Date >= 1/1/2017
2. Output
 - a. Constituent Information
 - i. Constituent ID
 - ii. First Name
 - iii. Last Name
 - iv. Org Name
 - b. Total Giving for 2017, 2018, 2019, 2020, 2021
 - i. Make sure you make the criteria match the Fund IDs
 - ii. Make sure the criteria matches the given year for the total
 - iii. Rename the Output column for the year