Fellowship One

Recommended Reports Guide
CONTENTS

1  INTRODUCTION and NOTES TO THE USER................................................................................................................. 4

2  REPORT CODE KEY .................................................................................................................................................. 4

   2.1  Quick Code Key................................................................................................................................................. 4

   2.2  Why are temporary groups helpful?................................................................................................................... 5

   2.3  Rights – Why Can’t I Run Some Reports?........................................................................................................ 5

   2.4  Core Reports..................................................................................................................................................... 5

3  PRELIMINARY LIST OF “GO-TO” REPORTS ....................................................................................................... 6

4  MINISTRIES & ACTIVITIES .................................................................................................................................... 10

   4.1  Absent/Tardy ................................................................................................................................................... 10

   4.2  Configuration .................................................................................................................................................. 10

   4.3  Individual Attendance .................................................................................................................................... 10

   4.4  Head Count/Totals ........................................................................................................................................... 11

   4.5  Participant Rosters ......................................................................................................................................... 12

   4.6  Volunteer Assignments .................................................................................................................................. 13

5  GIVING/CONTRIBUTIONS ..................................................................................................................................... 14

   5.1  Audit .............................................................................................................................................................. 14

   5.2  Batches .......................................................................................................................................................... 14

   5.3  Contributors ................................................................................................................................................ 14

   5.4  Fund Totals ................................................................................................................................................... 15

   5.5  Fund Summary .............................................................................................................................................. 15

   5.6  Online/Scheduled Contributions .................................................................................................................. 15

   5.7  Pledges ........................................................................................................................................................ 15

   5.8  Receipt Funds ................................................................................................................................................ 16

6  PEOPLE & HOUSEHOLDS ...................................................................................................................................... 16

   6.1  Contacts ......................................................................................................................................................... 16

   6.2  Directories .................................................................................................................................................... 17

   6.3  Groups .......................................................................................................................................................... 17

   6.4  Group Emails ............................................................................................................................................... 18

   6.5  Households .................................................................................................................................................. 18

   6.6  Individuals ................................................................................................................................................... 19

   6.7  Individual Attributes .................................................................................................................................... 19
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.8</td>
<td>Membership/Status</td>
<td>20</td>
</tr>
<tr>
<td>6.9</td>
<td>Portal Users</td>
<td>20</td>
</tr>
<tr>
<td>7</td>
<td>WEBLINK &amp; INFELLOWSHIP</td>
<td>21</td>
</tr>
<tr>
<td>7.1</td>
<td>Registrations</td>
<td>21</td>
</tr>
<tr>
<td>7.2</td>
<td>WebLink/InFellowship</td>
<td>21</td>
</tr>
<tr>
<td>8</td>
<td>Revision History</td>
<td>22</td>
</tr>
</tbody>
</table>
1 INTRODUCTION and NOTES TO THE USER
This document is designed to guide you to the recommended Fellowship One reports for the most commonly-needed data, including the top 125 most frequently-used reports and Core Reports that can be found spread throughout the guide. Start with the Table of Contents to target your area of primary interest and work from there. You will also notice several instances where common questions are presented and the answers are supplied with the recommended report(s) and filters that will help you.

If you find that a report listed here is not available to you or visible when you login to Fellowship One, contact your Fellowship One Champion or Administrator to make sure you have the necessary security rights to view that particular report. If you do have the rights for that report, but it is still not visible to you, simply submit a support ticket through your Fellowship One database requesting that the report number be made available to you and your staff.

2 REPORT CODE KEY
Every report in Fellowship One is assigned a report code in the form of P9400. There is a letter followed by four digits. This code allows you to look at reports that are grouped by overall topic.

The letter at the beginning of the code will tell you what topic or type of report you’re looking at, and the number is simply the identifying number for that report. If you understand how to interpret these codes, you can quickly narrow down your focus to reports that are most likely to give you what you are looking for. Consult the Quick Code Key below to see the meaning behind the various codes in the Report Library.

2.1 Quick Code Key
- A – Administrative Reports
- G – Giving Reports
- M – Ministry Reports
- P – People Reports
- X – Export of Data
- L – Report Output to Labels
- – Report Output can be sent to Temporary Group
2.2 Why are temporary groups helpful?

Temporary groups are extremely helpful because they give you the means to take action on a group of people directly from a report output. By creating a temporary group you’ve given yourself the means to:

- add selected individuals from the report output to a People List or InFellowship Group
- turn a list of children to a list of their parents (or vice versa) for correspondence
- use the temporary group as an email distribution list
- perform a mass action

Keep in mind that mass action is a security right so if you don’t see that capability it’s a subject of your rights not a system error. Also, be aware that temporary groups expire and disappear in three days.

2.3 Rights – Why Can’t I Run Some Reports?

Keep in mind that reports are rights driven, so you will only be able to run the reports that you have rights to. For example, the “M” reports will only allow you to run reports for the Ministries that you have rights to view, and by that same token, if you don’t have Giving reports rights, you won’t be able to run the “G” family of reports.

2.4 Core Reports

You will also notice the reports marked Core Reports. These reports were created to give you a powerful platform to produce many results out of one report. This allows the user to create his/her own custom report output. Each of these Core Reports is listed by their respective report codes and a full list of Core Reports is listed at the bottom of the recommended reports list.
3 PRELIMINARY LIST OF “GO-TO” REPORTS

What follows is a listing of the report groupings currently in use. An X at the end of the report code indicates a place holder for some number. You’ll find the report code, a brief description and bullet points suggesting the many ways you can use the reports to create your own report output to meet your needs.

**Administrative**

A1517 – Core Profile Summary – Returns a profile Summary about People or Households matching the criteria chosen.
  - Summaries of Household or Individual Dashboards

A8000 – Core Web User Account Records – Returns people having a Web User acct (Weblink or InFellowship) matching the criteria I choose.

A10XX – Administration reports like duplicate individual cleanup

A105X – Portal Users and their rights

A12XX – Data Quality Letters (Letters a church can send out to get new and updated contact information from members and regular attendees. It’s a great idea to send these out in the fall to update information for the upcoming Giving Statement season.)

A25XX – Export reports

A4005 – Contact efficiency

A8XXX – WebLink administration

**Giving/Contributions**

G1050 – Core Giving Records – Return details about giving received within a time period. Can be filtered by:
  - Who/how many with the status of X has given and the amount.
  - Who/how many has given to a certain fund, sub fund, pledge drive, online, etc.
  - Contribution summaries
  - Top contributors
  - Contributions over X amount
  - Contributions less than X amount
  - Scheduled contributions

G2022 – Core Household Giving by Attribute – Return household giving received within a time period having the individually attributes I choose.

G4110 – Core Pledge Summary – Display executive summary metrics for the pledge drive chosen.

G100X – Contribution statements (You can also use Statement Builder within Fellowship One.)

G7XXX – Receipts
**Ministries & Activities Reports**

**M1400 – Core Assignment Records** – Return the people that are assigned to the activities that I choose (this includes InFellowship Groups membership).
- Participant assignments for a selected activity, schedule, RLC group or RLC.
- Staffing assignments for a selected activity, schedule, RLC group or RLC.
- Membership for selected InFellowship Groups.
- Participant or staffing assignment by status or attribute.
- Run output into a temporary group for easy mass action or email distribution list.

**M1211 – Core Attendance Records** – Return the people that have or have not attended the activities and groups that I choose within a date range.
- Participant attendance for a selected activity, schedule, RLC group or RLC.
- Staffing attendance for a selected activity, schedule, RLC group or RLC.
- Attendance for selected InFellowship Groups.
- Attendance by status or attribute.
- Run output into a temporary group for easy mass action or email distribution list.
- Attendance marking sheet by including future dates

**M1300 – Core Attendance Totals Summary** – Return totals of attendance within a time period for the activities and groups chosen.
- Run either for individual attendance or headcount for groups or activities.

**M4010 – Core Contact & Note Summary** – Return a summary of the contacts and notes I choose occurring within a time period.
- Focus on one or all note types
- Focus on one or all contact forms
- Focus on individual contact items across multiple contact forms
- Focus on the outcome of a contact item

**M7050 – Core Group Prospect Records** – Return a list of prospects, their status in the prospect workflow, notes, how they entered the workflow, information about groups they are interested in, etc.
- Focus on prospects for a specific group type, group or span of care
- Focus on prospects with a specific status
- Focus on prospects entered within a certain time period.
- Display metrics including #of days a prospect has been active, #of interested prospects, etc.

**M7060 – Core Group Records** – Return the details and metrics about the InFellowship Groups I choose.
- Focus on one or all groups.
- Focus on changes in group counts.
- Focus on changes in membership, leadership or prospect counts.

**M9200 – Core Individual Roster** – Return a roster of people based on their involvement in the Groups or Activities I choose. This report creates an 8.5x11 pdf roster including photo.
- Focus on group membership or activity assignments.
• Cross-reference membership/assignment with attributes, requirements, demographic information.
• Output any individual information with the membership/assignment.
• Page break by groups, activities, etc.

**M3825 – Core Volunteer Pipeline Dashboard** – Display graphical trends for candidates in the Volunteer Pipeline. This report contains four graphs:
1. Volunteers assigned vs. volunteers attending for selected ministries
2. Number of new volunteers entering the pipeline over time
3. Number of candidates being processed within goal time vs. not
4. Number of candidates becoming a volunteer vs. other dispositions

**M3820 – Core Volunteer Pipeline Records** – Display candidates in the pipeline matching the criteria I choose. Shows all candidate submissions including, but not limited to, those that have been rejected or removed.

**M6023 – Core WebForm Submission Records** – Return the details for the webforms I choose submitted within a Time Period.
• Focus on one or many webforms under event registration.
• Focus on a form and its questions and answers.
• Focus on submission notes.
• Focus on payment details and notes.

**P1400 – Core Individual IDs to Group** – Create a temporary group using the Individual IDs I provide. This report is used in conjunction with another report like the Core Individual Records (P9400). Select Individual ID as one of the Output columns.

**P7000 – Core People Missing Data Values v2.0** – Return people missing the basic personal data values I choose. - Focus on marital status, gender, phone, email, status date, etc. to see which people are missing those data values for better data integrity and management.
• Focus on any missing data values, run the output to a temporary group and mass action the information into the missing data fields.

**P9400 – Core People Records** – Return the people details matching the criteria I choose automatically summarized by those details.
• Focus on status, age, DOB, gender, group membership, attributes, requirements, addresses, school, household information and the age of the children in the household.

**P1500 – Core Standard Letter v2.0** – Print a standard 8.5x11 form letter for the group of people I choose. Produce one letter per person or household with the content of your choice.

**P76XX – Group email** – Individual email recipients.
**Labels**

L1000 – Core Sheet Labels – Print 8.5x11 sheet of labels for the groups of people I choose.
- Choose one label for each individual, household or address in the group.
- Customize the format of the label (name and address).

**Exports**

X7050 – Core Group Prospects Export – Return prospect details for the groups I choose in a bulk export format.

**Core Reports**

M1400 – Core Assignment Records
M1211 – Core Attendance Records
M1300 – Core Attendance Totals Summary
M4010 – Core Contact & Note Summary
G1050 – Core Giving Records
M7050 – Core Group Prospect Records
X7050 – Core Group Prospects Export
M7060 – Core Group Records
G2022 – Core Household Giving by Attribute
P1400 – Core Individual IDs to Group
M9200 – Core Individual Roster
P7000 – Core People Missing Data Values
P9400 – Core People Records
G4110 – Core Pledge Summary
A1517 – Core Profile Summary
L1000 – Core Sheet Labels
P1500 – Core Standard Letter
M3825 – Core Volunteer Pipeline Dashboard
M3820 – Core Volunteer Pipeline Records
A8000 – Core Web User Account Records
M6023 – Core WebForm Submission Records
4 MINISTRIES & ACTIVITIES

4.1 Absent/Tardy

- **Who attended an activity in a specific date range?**
  Run the M1211 for those that attended and focus on the date range needed.

- **Who is assigned to an activity, but did not attend in a specific date range? (Both Participants and Volunteers)**
  M1211: Use the filters at the top under “Return these People...” to focus on people that are “NOT attending but IS assigned or in a group.”

- **Who did not attend within a specific date range?**
  M1211: Focus on the filter at the top to include “anyone NOT attending but IS assigned” and “anyone NOT attending but IS NOT assigned.”

- **Who has been absent after x amount of times attending?**
  M1211: Focus on “return based on attendance frequency” filter. You will find this under “additional filters” at the bottom of the report.

- **Who was late checking into an activity?**
  M1050E: Attendance Tardiness Report

4.2 Configuration

- **Which RLC’s have been made inactive?**
  A7000E: Active and Inactive Room/Locations

- **Which ministries have been made inactive?**
  A7005E: Active and Inactive Ministries

- **How can I print our current ministry configuration structure?**
  M9500E: Ministry Hierarchy

4.3 Individual Attendance

- **I want to print a list of people that typically attend my event**
  M1211: For any activity and date range. This report can also include future attendance dates for attendance marking.

- **Who has a birthday this month that attends my activity?**
  M1000: Birthday Listing Based on Activity Attendance or M1211 Core Attendance Records including the date of birth display column.

- **Who attended a specific activity on a specific date/time?**
  M1211: For any activity and date range.

- **Who works the Bookstore every first and third Saturday of the month?**
  M1400 or M1211 by staffing assignment or attendance for a specific staffing schedule.
• How many people attended the blue room and were in the zebra group last Sunday?
  M1211: Focus on the activity RLC and breakout group.

• Who attended a specific activity at least X times?
  M1211: Run attendance for an activity or group and use the attendance frequency filters under “additional filters.”

• How many people attended the 4th-5th Grade group during the Children’s Worship Service?
  M1300: by activity RLC Group and RLC.

• Who has an assignment to the Music Ministry and has attended within the last 6 months?
  M1211: Run by “anyone attending and IS assigned or in a group” and select volunteer attendance under the activity selection.

• Who attended the zebra room during the Children’s Worship service?
  M1211: Attendance by Activity and RLC

• Who is assigned and attended to work the Lion room during the Children’s Worship Service?
  M1211: Focus on the filter for “anyone attending and IS assigned or in a group” then select staffing attendance under the activity selection.

• I want to print labels for everyone who attended a specific activity within a specific date range.
  M1211: focus on the date range and change the Create Labels/Temporary Groups using: *filter to “Attending Individual”. Choose “Export individuals to labels” from the Choose an Output Type filter.

• Show me everyone who checked in at a specific station and what time they checked in.
  M2050E: Individual Check-In Kiosk Report

### 4.4 Head Count/Totals

• How many people attended an activity at our church last month?
  M1300: Core Attendance Totals Summary for the activity or activities within the given date range.

• Who regularly attends a specific activity?
  M1211: Activity Attendance focusing on service times for a specific activity.

• How many people (participants/volunteers) attended an activity on a specific date?
  M1300: Core Attendance Totals Summary for the activity and date range. You can focus on participants and/or volunteers (staffing).

• Distinct count of how many people attended across ministries during date range?
  M1300: Core Attendance Totals Summary focusing on the ministry or ministries wanted and the date range.
4.5 Participant Rosters

- **Which of the children in our Children's Ministry have a birthday in June?**
  M1000E: Birthday Listing Based on Activity or Assignment or M1400 or M1211 displaying birthday.

- **Who is assigned to a specific Activity Group/Room, Location, Class on a specific date and time?**
  M1400: Participant or Staffing Assignments for a group or RLC within the date range.

- **I need a roster of everyone assigned to a specific Activity Group/Room, Location, Class and a specific Breakout Group.**
  M1400: Participant or Staffing Assignments for a group, activity RLC and/or breakout group within the date range.

- **I need to email all volunteers or participants expected to report to a particular activity this week.**
  M1400: Focus on the activity or activities and run the output to a temporary group. Go to the Groups tab in Fellowship One, find the temporary group and use the actions gear at the bottom to email the selected individuals within that temporary group.

- **Who is assigned to the Jones Group Mondays at 5pm?**
  M1400: Ignore the activity filters and focus on the group to run the assignment report.

- **Who is assigned to Children's Church by 1st Grade Room and who has allergies?**
  M1400: Run the report for the activity RLC and in the “Choose fields to display” filters select the individuals’ name and tag comments. (This is assuming you have been recording allergies in tag comments on the individual record in order for them to display on the name tag at check-in.)

- **A roster of individuals assigned to a specific activity or activity schedule?**
  M1400 for a temporary group or excel spreadsheet for those assigned, or the M9200 for a pdf roster (with photos if wanted) for the specific activity. If you are reporting by schedule, focus on that filter to select the schedule on which you are reporting.

- **Who is assigned to a specific activity group/room, location, class and when is the last date they attended?**
  M1211: Focus on the activity or group and select “anyone attending that is NOT assigned,” and “anyone attending that IS assigned.” Under “Fields to display,” select the “Last attendance date” to display on your report along with the other individual information you desire in the output.

- **Who is assigned to a specific Activity Group/Room, Location, Class and have a specific attribute and how many children do they have in their household?**
  M1400: Select the desired activity. Under “Fields to display,” select the option to list how many children are in the household under “Household fields to display.” Click “additional filters” and select the desired attribute in the attributes filter.

- **Where do I get labels for the individuals that signed up for a specific activity?**
  Run the M1400 for your specific activity into a temporary group. Then run the L1000 Core Sheet Labels and focus on the temporary group as your information source for the label printout.
• I want to see the assignments to Elementary rooms with each room on a separate page. I also want to choose which fields to show. For example, I want to see the child’s date of birth, age, allergies, and the last time they attended the selected activity.
M1400: Run for the selected activity and page break by RLC. In the “Fields to display” filters, select the date of birth, age, tag comments (allergies) and last attendance date under the “Individual fields to display.”

4.6 Volunteer Assignments

• Who has staffing assignments to a ministry/activity (badge format)?
A1092: ID Badge by Staff Assignment

• What are the staff/volunteer birthdates for the Worship Team?
M1003E: Staff-Volunteer Birthday Listing Based on Activity or M1400 displaying birthday.

• Who has been assigned to volunteer for a specific activity?
M1400: Focus on the staffing assignments under the selected activity.

• Show me who is scheduled to volunteer at Trunk or Treat with their contact information in PDF format?
M9200 or the M1400 for staffing assignments for the selected activity.

• Provide a directory all individuals with staffing assignments?
M9200: Core Individual Roster

• Show me everyone serving on the A Team at our Women's Conference
M1400: Focus on staffing assignments based on Staffing Schedule

• Provide a list of all individuals who possess a staffing assignment?
M1400: Focus on group leaders and staffing assignments across all groups and activities.

• All individuals whose staffing assignments were created within a specific date range?
M9200: Focus on the “Created in this time period” filter.

• What can I use to see all of our members that signed up to be table leaders for the Men’s Bible Study?
M1400: Focus on staffing assignments by Activity, Job, and Status (if you have created tables as breakout groups, include these as well in your output.

• How do I see all of the volunteers I have scheduled for the month in my Children’s Ministry?
M1400: Focus on the “That are Valid for this Time Period” (choose This Month or Next Month) and “That are Valid for these Dates” filters.

• Who has an assignment with an expired requirement or background check?
M3745E: Expired Requirements by Staff Assignment
M3768E: Volunteers with Expired Background Checks

• Who is leading a small group?
M1400: Focus on group leaders for all groups.
5 GIVING/CONTRIBUTIONS

5.1 Audit

- Which user entered/edited contributions within a date range?
  G1050: Select the desired data range and under “Choose Fields and Configure Output” select the “entered by user” field to display the staff member that entered the contribution.

- How do I see a listing of all scanned checks with images?
  G1051: Contribution Master List with Check Images.

5.2 Batches

- I need a listing of all contribution details entered for this weekend
  G1050: Focus on all giving within the specified date range.

- I need a listing of all contribution details entered for a specific batch
  G1050: Focus on the specific batch under “Return Giving Records” and “Belonging to these batches.”

- How do we get our checks to the bank for deposit?
  G1053: Batch Bank Deposit

- What was the total amount given at each service this weekend?
  G1050: Under the “Fields to display” select the activity and/or activity time to display.

- How do I get a list of contributions by sub fund for batches?
  G1050: Select the batches and sub funds desired.

5.3 Contributors

- What do I use to print a real time contribution statement?
  G1000: Contribution Statement

- How much has each household given to our building fund year-to-date?
  G1050: Run for all contributors and amounts for the given fund within the date range.

- I need a list of everyone that gave this weekend. What fund and how much?
  G1050: Run for the specific date range and display funds and amounts in the output.

- Who has been attending regularly, but not giving?
  Run the M1211 for attendance to a specific activity and run the output to a temporary group. Run the G1050 for all giving and run the output to a temporary group. Run the A1080 to compare the two groups. For example: In the A1080 configuration, make the attendance group “X” and the giving group “Y” and run the report to see who is in X, but not in Y. This gives you a list of those attending but not giving.

- Who gave more than a certain number of times within a date range?
  G1050: Focus on individuals who have given more than X number of times (under additional filters).
5.4 **Fund Totals**

- How much was contributed to each fund during a date range?
  G1050: Focus on the fund and date range desired.
- **Fund and sub fund totals for a specific date range?**
  G1050: Focus on the fund, sub fund and date range desired.

5.5 **Fund Summary**

- **How do I print a breakdown of contributions for the weekend by fund and sub fund?**
  G1050: Focus on contributions for Date Range by Fund-Sub Fund
- I need a printable summary for my pastor that shows how much each household gave to the Missions Fund this month.
  G1057: Contributions for Date Range by Sub Fund
- **How much was contributed to funds by sub funds for each batch?**
  G1050: Run a Batch Summary by Sub Fund
- How many contributions has each fund received in a date range and what is the average contribution the fund receives?
  G1050: Run a Fund Summary with Average Gift displayed.
- **What do I use to see ACH contributions to the General fund in a printable list?**
  G1050: Run Detailed Giving by Fund-Sub Fund

5.6 **Online/Scheduled Contributions**

- Who gave contributions online during a specific date range?
  G1050: Run for all contributions within a date range whose origin was online giving.
- Who has contributions scheduled for a specific date range?
  G6000E: Scheduled Contributions for Date Range
- Who currently has active scheduled contributions?
  G6008E: Active Scheduled Contributions
- How many contributions were scheduled before and after a specific date?
  G6009E: Schedule Contributions Growth and Forecast
- Whose scheduled contributions failed within a date range?
  G6010E: Failed Scheduled Contributions By Date Range
- How many scheduled contributions do we have compared to one time/immediate contributions?
  G6050E: Online Transaction Comparison Data (Scheduled vs One Time)

5.7 **Pledges**

- How do I run pledge statements for people who have pledged?
  G1004: Pledge Statement
• What households are currently pledging and what is their status with that pledge?
  G4000: Household Pledge Report
• What households have multiple pledges?
  G4014E: Household Multi Pledge Drive Summary
• What is the pledge balance for those that have pledged?
  G4016E: Pledge Balances by Pledge Drive
  G4020E: Pledge Balances To Date by Pledge Drive and Contributor
• Who has given toward a pledge drive, but does not have a pledge card?
  G4025E: Giving toward Pledge Drive without Pledge
  G4127E: Households or Individuals Giving Without a Pledge
• Who has a pledge, but has not given?
  G4128E: Households with a Pledge and No Giving
• What are the statistics for our pledge drive?
  G4110: Pledge Drive Statistics
• Who has completed their pledge within a specific date range?
  G4122E: Pledges Completing in Date Range
• What is the difference given between pledge drives?
  G4150E: Pledge Drive Comparison with Differences

5.8 Receipt Funds
• Where can I print a statement for individuals who have made payments to receipt funds?
  G7000: Receipts Statement
• Where can I print a statement for completed payments for a registration?
  G7003: Receipts Statement for Activity Registration

6 PEOPLE & HOUSEHOLDS

6.1 Contacts
• What contacts were worked within a specific date range?
  M4010: Focus on contacts in progress or completed within a specific date range.
• Who entered contacts within a specific date range?
  A4008E: Contact Data Entry Report
  P1048E: Contact Entry Data Quality
• I need a quick summary of all the First Time Visitors that filled out a contact card this weekend.
  M4010: Focus on the date range and the First-Time Visitor contact item.
• I need to follow up on the Benevolence contacts that were entered 2 weeks ago to see where they stand.
  M4010: Focus on the Contact Items with Notes and the date range in which they were entered.
• Which contact items have contact notes within a certain date range?
  M4026: Contact Notes by Date Range

• How can I provide a follow-up worksheet to volunteers?
  M4036E: Contact Follow-Up Worksheet for Small Groups
  M4037: Contact Item Follow-Up Worksheet

• What contact items are tied to what forms?
  M9510E: Contact Items Tied to Contact Forms

• I want Contact Info for everyone who “Prayed to Receive Christ” via an Alter Call during the last 30 days.
  M4010: Run for Individual Contact Items within the given date range.

• I want a spreadsheet of people who filled out a visitor’s card and wanted more info about Baptism.
  P1041E: Contact Items by Contact Form (Matrix)

• How many contact items have been submitted within a certain date range?
  P1049E: Contact Count Based on Contact Type

• Which contact items have not been worked with a certain amount of days?
  P1083: Contact Items Not Worked in X Days Summary

• How many contacts were closed with a certain disposition?
  M4010: Focus on Contact Disposition

6.2 Directories

• I want a Membership Directory of Attendees who have not been Baptized
  P1019: Membership Directory

• Where can I get a membership directory based on the Head of Household?
  P1031: Membership Directory by Head of Household

• I want a Directory listing (with Photo) of individuals or Households based on a group list.
  A1033: Groups Directory With Multiple Options

• Where can I get a customizable membership directory?
  P1800: Customizable Membership Directory (3 columns)
  P1800: Customizable Membership Directory (4 columns)
  A1060: Condensed Church Directory Report

• Where can I get a membership directory report with photos?
  A5000E: Member Directory with Photos

• Where can I get a detailed household directory?
  A5010: Household Detailed Directory

6.3 Groups

• I want a list of people in a group such as "Fun Fest Volunteer" who are now "Inactive."
  M1400: Run for those assigned to the group and display status in the output.
• Who belongs to specific Groups/People Lists?
  M1400: Focus on InFellowship Groups’ membership.
  A1036: Groups Directory (Listed A-Z) for People Lists.

• What groups have been created within a date range?
  M7060: Focus on creation dates and changes to existing groups.

• How do I mash groups up to compare who is in each group?
  Run the M1400 for all groups and their members. Display the groups each individual is a member of on your output.

6.4 Group Emails

• What individuals have received an email from the Group Email application within a given date range?
  A1034E: Groups Email Confirmation

• Who did I send an email to by subject within a date range?
  P7600: Individual Email Recipients

• How can I see the status of a sent email?
  P7603E: Email Recipient Status

• Who has unsubscribed from group emails?
  P9400: Under “additional filters” you may select to see those that are unsubscribed.
  P7605E: Unsubscribed Email

• What emails are undeliverable?
  P7606E: Undeliverable Emails

6.5 Households

• Do we have any duplicate households?
  A1005: Duplicate Households

• Do we have any households with multiple people having the same household position?
  A1017E: Household With Multiple Head or Spouse

• How can I view household/individual activity/involvement?
  A1515: Household and Individual Details
  A1514: Household and Individual Details (Does not display contributions)
  P8007E: Household Involvement based on Status AND GAAC

• How can I look up what household a receipt tag code belongs to?
  M1020: Household Lookup Based on Tag Code

• What households have children?
  P2000: Households with Children - Members Listed
  P2001: Households With Children

• How do I send letters to households to verify their information is up to date?
  A1200: Data Quality Letter by Status
• How many households or individuals do we have within a zip code?
P9100: Household or Individual Counts by Zip Code

6.6 Individuals

• How can I get a statement that shows a person’s activity/involvement?
A1516: Individual Activity Statement

• Who has recently been added by either first record date or status date?
P9400: Run by the status of “member” and status date under “additional filters.”

• Who is within a certain age range that has a certain status?
P9400: Under “additional filters” select the desired age range under “Return based on birthdate or age” and then select the desired status.

• Show me a list of Members & Attendees having a birthday this month
P9400: Members with Birthday in X Month under additional filters in the “Return based on birthdate or age” filters.

• Who is a staff member with a birthday within a specific month?
P1101E: Staff with Birthday in X Month

• Show me the people in a specific Group(s) having a birthday this month
P9400: Run the report for the people in the specific group and select the desired birthday month under “Return based on birthdate or age.”

• I want a spreadsheet of children who were born between a certain date range
P9400: Run for those with the household position of “child” under the “Demographics” section, and the desired date range under the “Return based on birthdate or age” section.

• Who is missing basic demographic information?
P7000: Individuals Missing Basic Information

• Who has notes to a specific note type within a certain date range?
M4010: Focus on the specific note type and date range desired.

• Who has default tag comments? (appear on the bottom of name tags)
A9200E: People with Tag Comments

• How can I see who has been merged within a date range and by who?
A1013E: Duplicate Finder-Merge History

6.7 Individual Attributes

• Where do I find a list of all individuals with a specific attribute who are currently serving and their family information?
M1400: Run for those with an active staffing assignment or group leadership. Under “additional filters” select the specific attribute and display household information in the output.

• Show me everyone that has a specific attribute(s).
P9400: Under “additional filters” select the desired attribute.
• What households have people with certain attributes that can export to mailing labels?
P9400: Run the output to a temporary group and use the L1000 focusing on that temporary group to run labels.

• Show me everyone that doesn’t have a specific attribute(s).
P9400: Under the “additional filters” and under the “Return based on attributes,” select the option to show “Return people NOT having selected attributes,” and select the desired attribute/s.

• How many people records have certain attributes?
P9400: Focus on additional filters and attributes.

• I want a spreadsheet of all the people who have visited from Houston, TX where we now have a new campus.
P9400: Select the desired city/state under “Return based on address.”

• Who does not have a certain attribute and has not been attending a specific activity?
Run the M1211 for attendance on the specific activity with the output to a temporary group. Then run the P9400 focusing on that temporary group and selecting the desired attribute under “additional filters.”

• Show me everyone that has a specific attribute(s) with a Start or End Date in a certain range.
P9400: Focus on the desired attribute under “additional filters.”

• Show me everyone that has a specific attribute(s), but has not been attending within a certain date range?
Run the M1211 for those NOT attending a specific activity and run the output into a temporary group. Then run the P9400 using the temporary group as your focus and select the desired attribute under “additional filters.”

6.8 Membership/Status

• How many individuals possess certain membership statuses?
P9400: Focus on the desired status under “additional filters.”

• I want a spreadsheet of newly entered people within a date Range and their status.
P9400: Run by date range and display date entered.

• I want a list of every one of a certain age with mailing and contact information.
P9400: Run the report for your specific age range and display contact information in the output.

• I want a list of New People from the Website, InFellowship Groups, or Check-In.
P9400: New From website denotes those created in Weblink or InFellowship. New from check-in denotes those created during check-in.

• I want a list of children between 10 and 12 who were created during Check-In.
P9400: Run for the specific age range and the status of “new from check-in.”

6.9 Portal Users

• Are there any portal users that are missing information?
A1041: Portal User’s Missing Information
• When is the last time a portal user logged in?
  A1045: Portal User Last Login

• What security roles/rights do portal users have?
  A1051: Portal User’s Security Roles and Rights
  A1056: User Assigned Security Roles
  A1059: User Security Types and Roles

7 WEBLINK & INFELLOWSHIP

7.1 Registrations

• I would like to see everyone who has filled out a specific WebLink form within a certain date range along their answers to all the questions on the form.
  M6023: Activity registration, payment information and questions/answers are all available.

• I would like to see everyone who has filled out the WebLink form Childcare within the past 30 days along with questions and answers and any notes regarding refunds.
  M6023: Activity Registration Results by Form with WebLink Notes.

• Show me everyone who filled out the WebLink form for our Men's Retreat within the past 3 months along with the payment information and answers to form questions.
  M6023: Activity Registration by Form with Payment and Form Questions and Answers.

7.2 WebLink/InFellowship

• Who has created a web user account? Who has not?
  A8000: Web User Account Listing
  P7000: Missing Data Values – Focus on those missing the InFellowship ID or account.

• Where can I find the URLs to place on my church website?
  A8010: WebLink Setup Codes
  InFellowship links can be found under WebLink>InFellowship>Links in Fellowship One.
## 8 Revision History

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