AAUW California Fund Report November 17, 2022







Data the Report Contains

- AAUW ID Member ID
- Account Name Member name
- Produce Name Name of the Fund where the donation was made
- Amount The amount of the donation
- **Transaction Date** The date the the donation was credited. This may be different than the date that you submitted it.
- Branch Name Your Branch Number and Name

| AAUW ID | Account Name | Product Name | Amount | Transaction Date | Branch Name |
|---------|--------------|--------------------------------|---------|------------------|--------------------|
| 1234568 | Name 1 | 9110-AAUW Greatest Needs Fund | \$20.00 | 6/16/2022 | CA00XX-Branch Name |
| 1234569 | Name 2 | 4450-Education & Training Fund | \$14.00 | 6/20/2022 | CA00XX-Branch Name |
| 1234570 | Name 2 | 4450-Education & Training Fund | \$15.00 | 6/21/2022 | CA00XX-Branch Name |
| 1234571 | Name 3 | 4450-Education & Training Fund | \$15.00 | 6/21/2022 | CA00XX-Branch Name |
| 1234572 | Name 4 | 9110-AAUW Greatest Needs Fund | \$60.00 | 6/21/2022 | CA00XX-Branch Name |
| 1234573 | Name 5 | 4450-Education & Training Fund | \$30.00 | 6/21/2022 | CA00XX-Branch Name |
| 1234574 | Name 6 | 4450-Education & Training Fund | \$20.00 | 6/21/2022 | CA00XX-Branch Name |
| 1234575 | Name 7 | 4450-Education & Training Fund | \$25.00 | 6/21/2022 | CAOOXX-Branch Name |







Known Report Issues

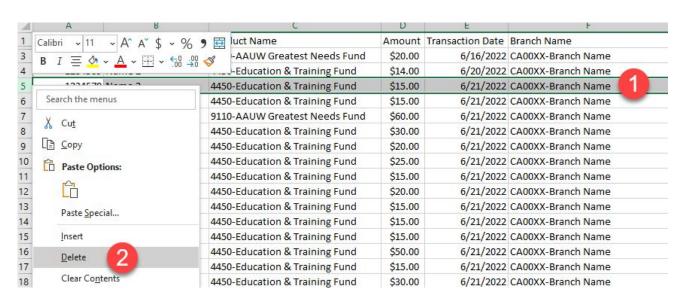
- Dual Members Donations from members who belong to multiple branches are listed on all branch reports.
- Some transactions seem to be duplicated.
- Unintended Recipients
 - o Reports were sent to current and immediate past branch leaders.
 - State leaders are listed on the report.
 - Sandi Gabe Marsha Swails
 - Roli Wendorf Dianne Owens





How To Remove State Leaders From The Report

- **1.** Highlight the row you want to remove.
- **2.** Right click and delete.

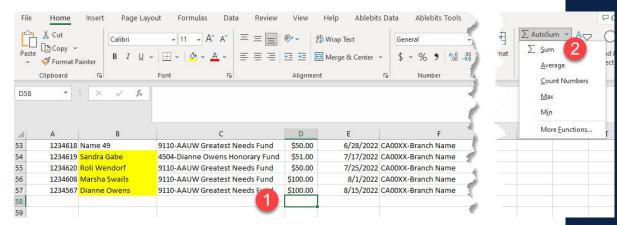






How To Find The Total Branch Donations

- 1. Place your cursor in the last cell in the amount column
- 2. Choose "Sum"
- **3.** Press enter to select the column or adjust the cells



| A | В | С | D | E | F |
|---------|---------------|---------------------------------|--------------------------|-----------|--------------------|
| 1234618 | Name 49 | 9110-AAUW Greatest Needs Fund | \$50.00 | 6/28/2022 | CA00XX-Branch Name |
| 1234619 | Sandra Gabe | 4504-Dianne Owens Honorary Fund | \$51.00 | 7/17/2022 | CA00XX-Branch Name |
| 1234620 | Roli Wendorf | 9110-AAUW Greatest Needs Fund | \$50.00 | 7/25/2022 | CA00XX-Branch Name |
| 1234608 | Marsha Swails | 9110-AAUW Greatest Needs Fund | \$100.00 | 8/1/2022 | CA00XX-Branch Name |
| 1234567 | Dianne Owens | 9110-AAUW Greatest Needs Fund | \$100.00 | 8/15/2022 | CA00XX-Branch Name |
| | | | =SUM(D2:E | | |
| | | 3 | SUM(number1, [number2],) | | |





How To Find The Total Donations By Member

- Sort by account name or account ID
 - 1. Choose column
 - 2.Choose sort
- Subtotal on amount column
 - 3. Choose Subtotal
 - 4. Choose the column
 - 5. Choose "Sum"
 - 6. Choose the column to total
 - 7. Choose OK

