How Do I…

Add Gift Details to my report?

Problem

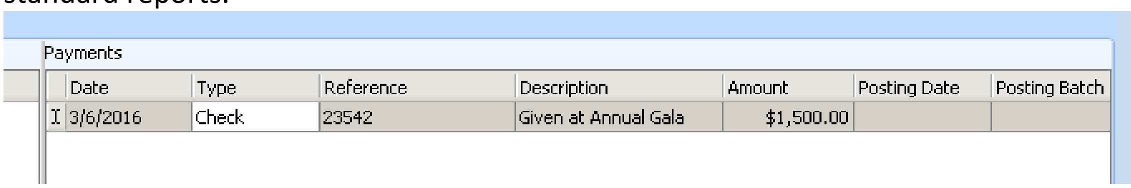
Many standard TCM reports show general gift information, but do not show detailed information such as Payment Reference or Description or even whether a Check or Credit Card was used.

Solution

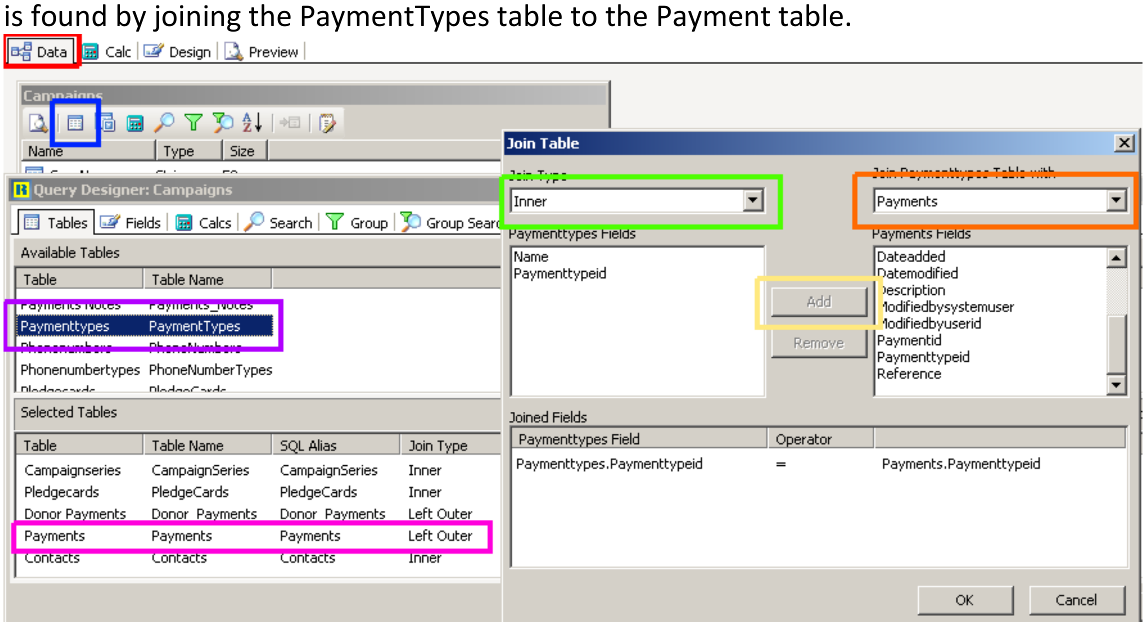
By adding a few columns to the report, the report can easily be enriched with additional information.

Process

1. Open your report for editing in TCM (Right click on the report and choose **Design**)
    a. For this example, "F 4-Donor Listing" will be used.
2. Go to **File → Save As** and give it a new name. This will prevent any accidental loss of the standard reports.

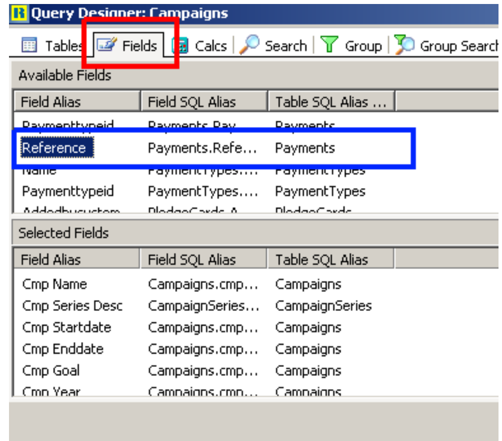


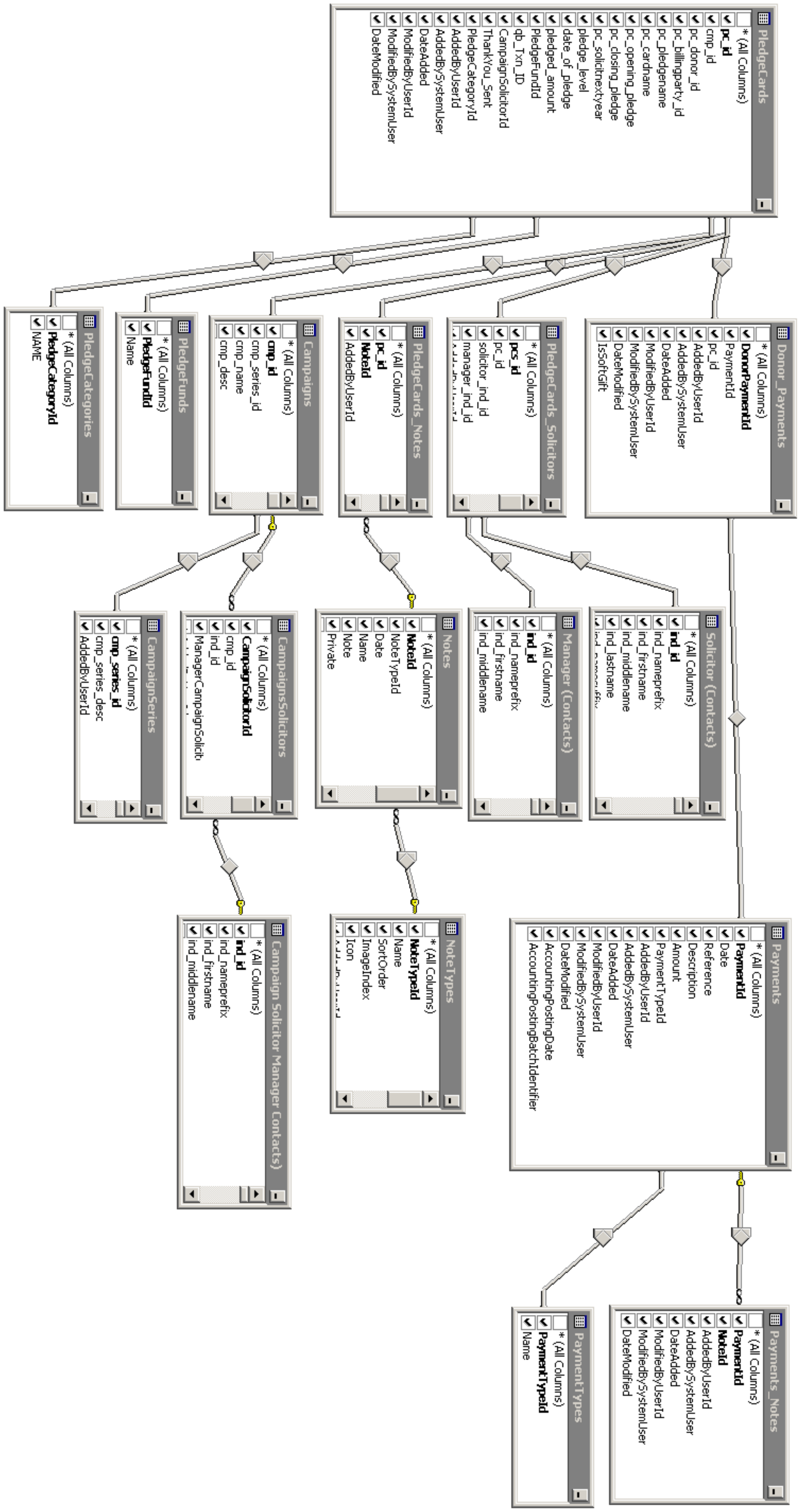
3. Determine which field needs to be added to the report. Generally the name in the application is similar to the database name. On the last page of this guide a schema diagram shows the fields and tables used by gifts in TCM.
4. This example requires Payment Type, Payment Reference and Payment Description.
5. The schema shows Reference and Description are in the Payments table. Payment Type is found by joining the PaymentTypes table to the Payment table.



6. Go to the Data tab [RED] in the report.

7. Click on the Tables icon [BLUE] and validate the two tables are present in the query. Payments [PINK] is present, but Paymenttypes [PURPLE] is not. Double click on Paymenttypes to add it to the list.
8. Set the Join Type to Inner [GREEN] and the table to Payments [ORANGE]. This defines the linkage between Paymenttypes and Payments.
9. Select PaymentTypeID on both sides and click *Add* [YELLOW]. Click *OK* and Paymenttypes will appear in the table list.
10. Click on the second tab, Fields [RED], and add the three new fields by double clicking on them from the top to the bottom [BLUE].
11. Once complete, Click *OK*, and then return to the *Design* tab.
12. Add the new fields to the report and Save.




PledgeCards
* (All Columns)
pc_id
cmp_id
pc_donor_id
pc_billingparty_id
pc_pledgename
pc_cardname
pc_opening_pledge
pc_closing_pledge
pc_solicitnextyear
pledge_level
date_of_pledge
pledged_amount
PledgeFundId
qb_Txn_ID
CampaignSolicitorId
ThankYou_Sent
PledgeCategoryId
AddedByUserId
AddedBySystemUser
DateAdded
ModifiedByUserId
ModifiedBySystemUser
DateModified
PledgeCategories
* (All Columns)
PledgeCategoryId
NAME
PledgeFunds
* (All Columns)
PledgeFundId
Name
Campaigns
* (All Columns)
cmp_id
cmp_series_id
cmp_name
cmp_desc
PledgeCards_Notes
* (All Columns)
pc_id
NoteId
AddedByUserId
PledgeCards_Solicitors
* (All Columns)
pcs_id
pc_id
solicitor_ind_id
manager_ind_id
Donor_Payments
* (All Columns)
DonorPaymentId
PaymentId
pc_id
AddedByUserId
AddedBySystemUser
DateAdded
ModifiedByUserId
ModifiedBySystemUser
DateModified
IsSoftGift
CampaignSeries
* (All Columns)
cmp_series_id
cmp_series_desc
AddedByUserId
CampaignsSolicitors
* (All Columns)
CampaignSolicitorId
cmp_id
ind_id
Notes
* (All Columns)
NoteId
NoteTypeId
Date
Name
Note
Private
Manager (Contacts)
* (All Columns)
ind_id
ind_nameprefix
ind_firstname
ind_middlename
Solicitor (Contacts)
* (All Columns)
ind_id
ind_nameprefix
ind_firstname
ind_middlename
ind_lastname
Campaign Solicitor Manager Contacts)
* (All Columns)
ind_id
ind_nameprefix
ind_firstname
ind_middlename
NoteTypes
* (All Columns)
NoteTypeId
Name
SortOrder
ImageIndex
Icon
Payments
* (All Columns)
PaymentId
Date
Reference
Description
Amount
PaymentTypeId
AddedByUserId
AddedBySystemUser
DateAdded
ModifiedByUserId
ModifiedBySystemUser
DateModified
AccountingPostingDate
AccountingPostingBatchIdentifier
PaymentTypes
* (All Columns)
PaymentTypeId
Name
Payments_Notes
* (All Columns)
PaymentId
NoteId
AddedByUserId
AddedBySystemUser
DateAdded
ModifiedByUserId
ModifiedBySystemUser
DateModified