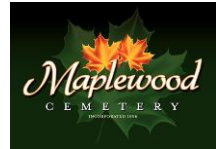


MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process

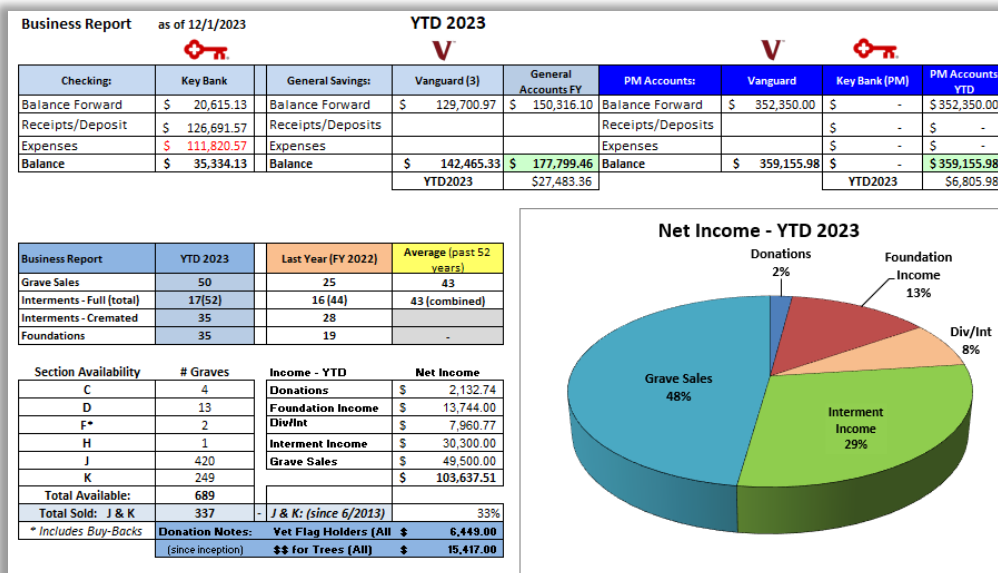


Introduction

Welcome to Graves Sold Report Training!

The MWC Quarterly and Annual reports are important and required to present the status of the MWC Association. This training document will take you through the process of completing this report.

Below is a sample of the quarterly business report:



This is a complex report to generate and requires multiple sources. More details on how to create this report are provided in the 'Business Reports' training.

Grave Sales, the actual number of graves sold, in the report year are more difficult to compile. This document focuses on how to report the GRAVE SALES. Multiple 'tools' are required. Some of that data will also be used to report the Section Availability numbers.

Information needed for this Grave Sales report requires data from:

- QuickBooks Online (QBO)
- MWC Admin
- MS Access database
- MS Excel

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process



Graves SOLD vs. Grave SALES

It turns out that these are 2 different items that make a big difference on how we report our inventory of graves and how we allocate Permanent Maintenance (PM) for Grave Sales. Both values are needed for our quarterly and annual reports for MWC and NYS.

- QuickBooks Online (QBO)
 - Provides the **Grave Sales** amount.
 - **Grave Sale Income Report:** reports all the funds applied to both the **complete purchase** and the **monthly payment plans** during the report period.
 - This is the amount that should be entered in the Grave Sales Income cell of the Business Report.
- **MWC Admin:** To provide the **Grave Sold** count.



The **'Sold Yr'** button can be used to generate the listing of Graves Sold for the year entered. This data must be filtered to produce the actual number of graves sold. The MWC database that is used contains the names and graves that each person is recorded as assigned to use.

In many cases, there is more than 1 person assigned to the same grave.

The data filtering needs to be done to eliminate that redundancy and provide an accurate grave sold count.

Once the **'Sold Yr'** button has been selected and the desired report year entered, the results will be displayed on the screen.

Enter

Grave Sold Year: **Search**

Searching for: 2023
MWC Database Output Rev. 2

The Results loop begins: 71

Section	Lot	Grave	Last	First	Int	Cre	Int Yr	Dod	Mnt	Grave Sold
K	25	7	Anticoli	Dana		C			0	2023-11-06
K	25	7	Anticoli	Matthew		C			0	2023-11-06
K	25	5	Baresse	Thomas		C			0	2023-11-06
K	25	6	Baresse	Noreen		C			0	2023-11-06
K	25	6	Baresse	Craig		C			0	2023-11-06
K	18	7	Bouphavong	Phetsamone		C			0	2023-12-29
K	18	7	Bouphavong	Manida		C			0	2023-12-29
J	4	22	Brady	Kevin					0	2023-05-19
F	207	4	Brooks	Norita					0	2023-09-13

- The results table can then be copied or **'screen scraped'** and pasted into an empty tab of an **Excel Spreadsheet**.

- This data should paste properly in multiple columns, with the headers, for further analysis.

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process



The screenshot displays the Microsoft Excel interface. The background shows a large data table with columns: Section, Lot, Grave, Last, First, Int, Cre, Int Yr, Dod, Mnt, and Grave_Sold. The foreground shows the 'PivotTable from table or range' dialog box. The 'Table/Range' is set to 'Sheet1!\$A\$1:\$K\$72'. Under 'Choose where you want the PivotTable to be placed', 'New Worksheet' is selected. The 'Location' is set to a new sheet. The 'Add this data to the Data Model' checkbox is unchecked.

Here is the Graves Sold data pasted into an Excel spreadsheet.

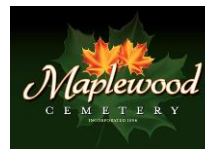
The 'Filtering' process involves creating a PIVOT table.

- Select all the data that was pasted into this tab.
- Click on **INSERT** in the top menu, then **Pivot Table**.

- This pop-up will appear showing the range you selected of this data, including the top row data headers.
- New Worksheet has already been selected. (a new tab)
- Click OK
- Then switch to the New Worksheet – **Sheet 2**

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process



PivotTable Fields

Choose fields to add to report:

Search

- ☒ Lot
- ☒ Grave
- ☒ Last
- ☒ First
- ☐ Int
- ☐ Cre
- ☐ Int Yr
- ☐ Dod
- ☐ Mnt
- ☒ Grave_Sold
- ☐ Days (Grave_Sold)

Drag fields between areas below:

Filters	Columns

Rows	Values
Section	
Lot	
Grave	
Last	
First	

Select these fields to be shown in the Pivot Table in the order shown below.

Make sure that the fields are selected in this order.

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process



PivotTable Name: PivotTable1
Active Field: First
Field Settings: Drill Down, Drill Up, Expand Field, Collapse Field
Group Selection: Ungroup, Group Field, Group
Filter: Insert Slicer, Insert Timeline, Filter Connections
Data: Refresh, Change Data Source, Clear

PivotTable Options
PivotTable Name: PivotTable1
Layout & Format | Totals & Filters | Display | Printing | Data | Alt Text
Display
☒ Show expand/collapse buttons
☒ Show contextual tooltips
☐ Show properties in tooltips
☒ Display field captions and filter drop downs
☒ Classic PivotTable layout (enables dragging of fields in the grid)
☐ Show the Values row
☐ Show items with no data on rows
☐ Show items with no data on columns
☒ Display item labels when no fields are in the values area
Field List
☐ Sort A to Z
☒ Sort in data source order

I prefer to use the 'Classic PivotTable' view.

The next step is to add a filter to the pivot table to get the actual count of the graves sold.

N5 : X ✓ fx =IF(D5<>"",1,0)

Section	Lot	Grave	Last	First	Grave_Sold	Count
D	467	3	Grieger	Patricia	11/4/2023	1
		4	Grieger	Irma	11/4/2023	1
F	40	8	Connor	Nancy	4/28/2023	1
	112	8	Ferera	Anthony	4/19/2023	1
	113	6	Klump	Mary	4/19/2023	0
				Carolyn	9/1/2023	1
	207	3	Costner	Robert	9/1/2023	0
		4	Costner	Lolita	9/13/2023	1
	211	8	Brooks	Norita	9/13/2023	1
		8	Cordello, Sr.	David	7/20/2023	1
H	15	3	Day	Timothy	9/6/2023	1
J	4	22	Brady	Kevin	5/19/2023	1
	5	1	Quaring	Angelina	2/8/2023	1
	6	1	Quaring	Cindy	1/12/2023	1
				Thomas	1/12/2023	0
		2	Quaring	Cindy	1/17/2023	1
	10	21	Rybinski	Erin	11/7/2023	1
				Steven	11/7/2023	0
		22	Theis	David	11/7/2023	1
		23	Theis	Monica	11/7/2023	1
				Scott	11/7/2023	0
		25	Gaskill	Frederick	5/1/2023	1

The filter is this equation that will eliminate the redundancies.

Add this equation in column N, repeat the equation to the end of the table data.

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process

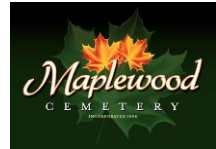


	A	B	C	D	E	F	G	H	I	J	K	L	M	N
46			8	O'Brien	Family	10/12/2023								1
47			9	O'Brien	Family	10/12/2023								1
48			10	O'Brien	Family	10/12/2023								1
49			11	O'Brien	Family	10/12/2023								1
50			12	O'Brien	Family	10/12/2023								1
51			13	O'Brien	Family	10/12/2023								1
52		11	17	Eller	Carl	3/28/2023								1
53					Janet	3/28/2023								0
54		12	9	Pfluke	Les	12/26/2023								1
55					Linda	12/26/2023								0
56		16	18	Kerr	Barbara	8/21/2023								1
57					Ray	8/21/2023								0
58		17	3	Edkins	Neil	1/31/2023								1
59					Phyllis	1/31/2023								0
60		18	7	Bouphavong	Manida	12/29/2023								1
61					Phetsamon	12/29/2023								0
62		21	2	Lapp	Darwin	8/31/2023								1
63			3	Lapp	Shirley	8/31/2023								1
64		22	7	Morton	Brian	9/25/2023								1
65					Geraldine	9/25/2023								0
66		23	8	Kleemann	Cole	8/31/2023								1
67			9	Kleemann	Jack	8/31/2023								1
68		25	5	Baresse	Thomas	11/6/2023								1
69			6	Baresse	Craig	11/6/2023								1
70					Noreen	11/6/2023								0
71			7	Anticoli	Dana	11/6/2023								1
72					Matthew	11/6/2023								0
73			8	Cordello, Sr.	Anthony	11/6/2023								1
74				Keady	Lori	11/6/2023								1
75			9	Cordello	Michael	11/6/2023								1
76	Grand Total													52
77														

The accurate count of the graves sold in report year 2023 is shown here:

MWC Graves Sold Report Training

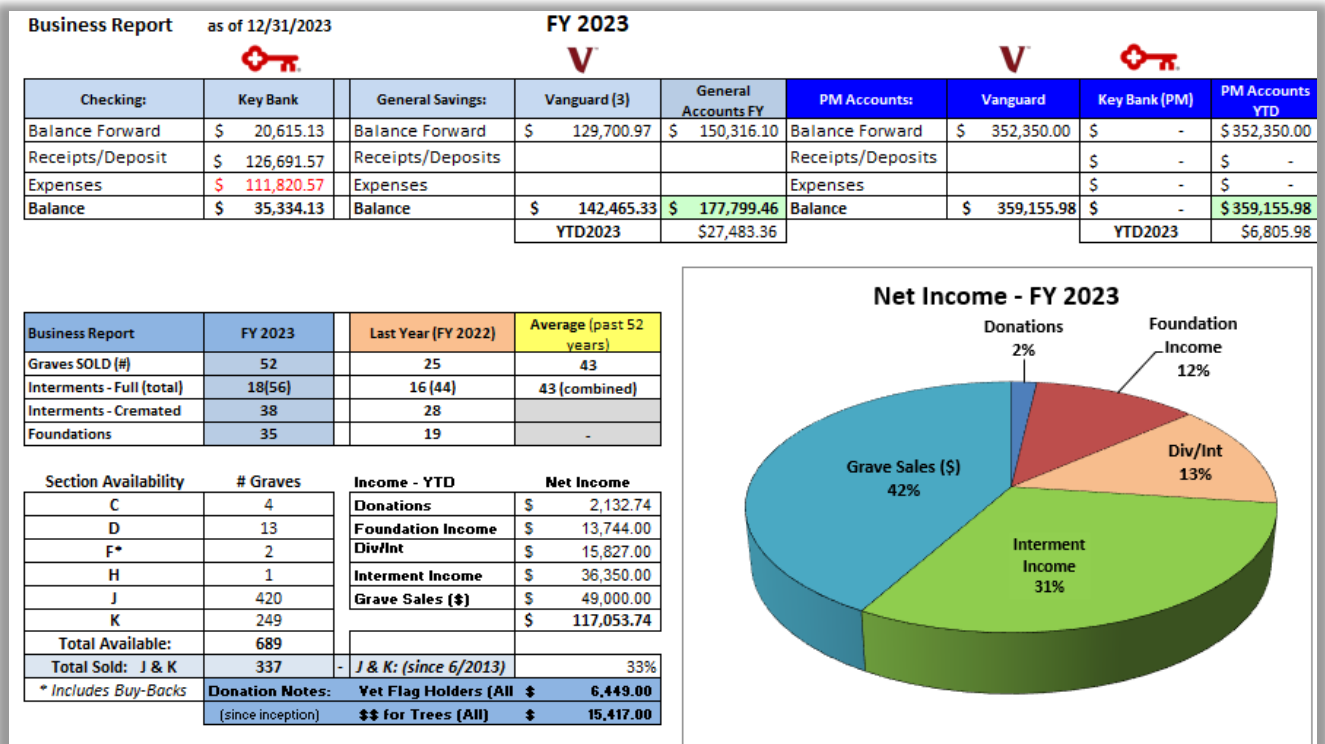
The Maplewood Cemetery Financial Process



Wrapping Up:

Once all the required data is plugged into the appropriate data cells, the Business Report should be ready to capture.

The area of the report used for distribution will be visible if the Print Area is set up properly. It is recommended that the Print Area of the report also be 'screen grabbed' using a tool like MS Snipping Tool to save the image as a PNG format image. This makes the overall quarterly meeting minutes easier to create.

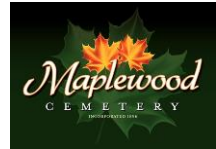


Conclusion: The Graves SOLD X \$1,200 (current price of a full grave) = \$62,400. That is **NOT** the actual grave sale income of \$49,000 that was received. It is important to be able to calculate and report Graves SOLD vs. Grave Sales accurately.

Remember that grave sale payment plans may run over the FY boundaries. Graves that were sold and placed in the payment plan that were purchased in a previous year will not be counted as GRAVES SOLD in this FY but will count as GRAVE SALES income.

MWC Graves Sold Report Training

The Maplewood Cemetery Financial Process



Other Reference materials: All are on the [MWC Admin website](#).

Reports/NYS Cemetery Div

- cemeteries-101-basics
- cemeteries-101-accounting-basics
- Not-For-Profit-Corporation-Law-Article-15-Public-Cemetery-Corporations
- NYS public cemetery regulations
- NYS treasurers-manual-final-100611

Reports/Training

- MWC Treasurer QBO Training
- MWC Treasurer Training
- MWC Sales Training
- MWC Business Reports
- MWC PM Reports
- MWC Grave SOLD Reports (this document)