# Reports Guide

08/19/2020 Blackbaud CRM 4.0 Reports US



Reports-2016

# Contents

# Manage Reports



From *Analysis*, you can view all of the program's reports. There are also two main tools provided to help create and manage reports: the Report Model Generator and the Report Explorer. With the Report Model Generator, you can create report models on which to base reports. With the Report Explorer, you can create and manage reports.

Hosted customers must have a Blackbaud hosting account to log into SQL Server Reporting Services, even if they have their own SSO login. Hosted clients will also only be able to view reports. Editing reports from SQL Server Reporting Services requires you to have access to the SQL Server to make edits to reports.

Due to the deprecation of certain features of Microsoft and the Report Builder for SQL Server 2016, you can now only access the reports and models for certain features via the SQL Server Reporting Services web view.

Report Requirement For SQL Server 2014 and SQL Server 2016:

If you host Blackbaud Enterprise CRM on premise, you must have a connection to SQL Server Reporting Services (SSRS) and permissions to the SQL Server to make edits to reports.

If you do not already have Report Builder, you will need to download it from the Microsoft Download Center. https://www.microsoft.com/en-us/download/details.aspx?id=53613. Report Builder can only be run in Internet Explorer or Microsoft Edge.

# Report Model Generator

For more advanced reporting needs, you can use Report Model Generator to create report models. You can then use these report models with tools such as Microsoft SQL Server Report Builder to create custom reports.

With Report Model Generator, you create the report models based on query views established in the program. Once you select the type of query to use, you can select which fields to include in the model. The model is accessible from the Report Explorer, as well as directly from the Reporting Services server.

***Note:*** We recommend you refer to Microsoft's SQL Server 2008 Books Online in the MSDN library at msdn.microsoft.com for information about how to use Report Builder.

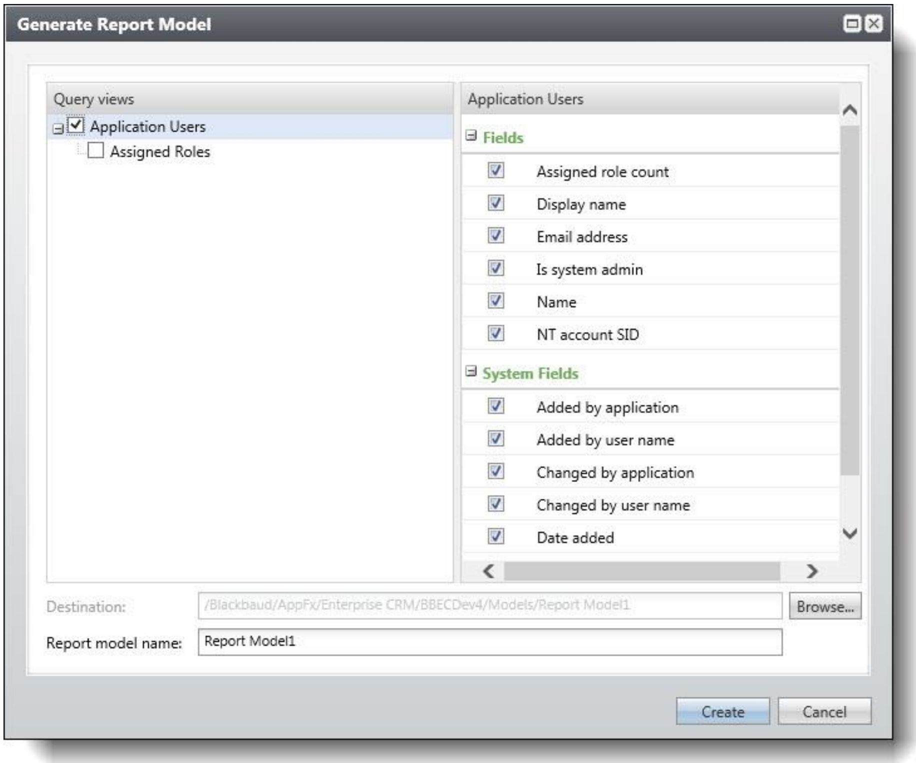
Once you have created a report based on a report model, from the Report Explorer, you can add a shortcut to the report to a page in the program so you can run it from a specific area.

## Create Report Models

When creating a report model, you must first specify the source view from which the model should be created. This determines the type of records and information that will be included.

### Create a report model

1. From *Analysis*, select **Report model generator**. The Select a Source View screen appears. On this screen you select the view containing the type of records and information you want in your report model.
2. Select the source view on which you want to base the model and click **OK**. The Generate report model screen appears.




3. Select the fields you want to include in your model, including any system fields.
4. Name your report model and specify where on the Reporting Services server to save it. The default location is a "Models" folder.

***Note:*** We recommend you refer to Microsoft's SQL Server 2008 Books Online in the MSDN library at msdn.microsoft.com for information about how to use Report Builder.

5. Click **Create** to generate this report model.
6. Click **Open the report model with report builder** to start the Report Builder application included with Reporting Services and begin working with the model. You can also access this report model later from Report Explorer or directly from the Reporting Services server.

   In SQL Server 2014, click **Open the report model with report builder** to start the ReportBuilder application included with Reporting Services and begin working with the model as the model is automatically linked to the report. You can also access this report model later from Report Explorer or directly from the Reporting Services server.

   In SQL Server 2016, the **Open the report model with report builder** option will not function due to the deprecation of certain features of Microsoft and the Report Builder. To edit the Report Model using SQL Server 2016, open SQL Server Reporting Services, create a new report, and select the model created from ***Blackbaud Enterprise CRM***.
7. Click **Close**.

# Edit Report Models

You can edit the information included in a saved report model. You should not edit a report model already used for reports unless you are sure the changes you make will not affect those reports.

### Edit a report model

1. From Report Explorer, in the Models folder, right-click on the model you want to edit and select **Edit model**. The Generate Report Model screen appears.
2. Make any necessary changes to the model.

> ***Warning:*** You should not edit a report model already used for reports unless you are sure the changes you make will not affect those reports. Removing fields from a report model means that data will no longer be available in reports which use the model.

3. Click **Save** to save your changes and return to the Report Explorer page.

> ***Note:*** In SQL Server 2014, the Generate Report Model screen will display the option to **Open the report model with report builder**, which automatically links the model with the report. In SQL Server 2016, the **Open the report model with report builder** link does not function due to the deprecation of certain features of Microsoft and the Report Builder. To edit the Report Model using SQL Server 2016, open SQL Server Reporting Services, create a new report, and select the model created from ***Blackbaud Enterprise CRM***.

# Delete Report Models

You can delete report models you no longer need. When you delete a report model, any reports which use that model will no longer run.

### Delete a report model

1. From Report Explorer, in the Models folder, right-click on the model you want to remove and select **Delete model**. A confirmation message appears.

> ***Warning:*** When you delete a report model, any reports which use that model will no longer run.

2. Click **Yes** to delete the report model.

# Report Explorer

Report Explorer provides a view of all the program reports on the server, including system reports, report models, and report parameter sets. In the Report Explorer, you can also see the primary data source for this program. You can use Report Model Generator to build report models to use in custom reports. If you have the appropriate security rights, you can access the data source directly from the Reporting Services server using other reporting or SQL Server tools such as Model Designer or Report Builder to create reports. To edit and customize ad-hoc query reports, you must use Report Builder 2.0.

***Note:*** We recommend you refer to Microsoft's SQL Server 2008 Books Online in the MSDN library at msdn.microsoft.com for information about how to use Report Builder.

Due to the deprecation of certain features of Microsoft and the Report Builder for SQL Server 2016, the create report and edit report features in Report Explorer are not available for use with SQL Server 2016. If you would like to create and edit reports you must open SQL Server Reporting Services and make your changes. Once you have made your changes in SQL Server Reporting Services, those changes will be reflected in Report Explorer in ***Blackbaud Enterprise CRM***.

***Note:*** Some features in Report Explorer can only be run in Internet Explorer.

# System Reports and Report Parameter Sets

Report Explorer provides a view of all system reports. You can open these reports, enter parameters, and run them. You can also enter parameters and save that parameter set—one that is linked to the original report for content and display information, but that contains the report parameters you specified.

System reports are available throughout the program. These reports are located under **Reports** on the explorer bar from various areas of the program. Security for system reports is set based on a user's role in the program.

Report parameter sets, on a basic level, have two things: parameters and permissions. The parameters are created specifically for that report parameter set. The permissions from within the program are determined by a user's role. Since parameter sets reside on the Reporting Services server, the permissions from outside the program are determined by permissions granted on the server itself.

# Create Report Parameter Sets

Because report parameter sets reside on the Reporting Services server, security on the server determines who has access to these reports from outside the program. Those permissions could be set up to be different than role-based security as defined in the program. Security on the Reporting Services server is inherent based upon the security of the folders on the server. You could set up a folder structure to mimic your roles in the program. That way, permissions for report parameter sets accessed directly from the server can be similar to the role-based permissions in the program.

If two different roles need access to a report parameter set on the Reporting Services server, you need to have a parameter set in each of those folders. However, report parameter set names on the Reporting Services server must be unique. If you set up folders on your Reporting Services server to mimic roles in the program, a report in two different places must have two different names, even if those reports are the same.

# Run Reports from Report Explorer

From Report Explorer, you can run any report, including system reports, report parameter sets, or custom reports you built. To run a report, select it and click **Open report** on the report explorer toolbar. You can then adjust the report parameters as needed and view the report.

# Edit Report Information

To edit a report, select it and click **Edit report**. In SQL Server 2014, the Report Builder application included with Reporting Services will open and you can begin editing the report.

In SQL Server 2016, the **Edit Report** option does not function due to the deprecation of certain features of Microsoft and the Report Builder. To edit the Report using SQL Server 2016, open SQL Server Reporting Services and navigate to the report.

# Save Report Parameter Set

Once you run a report, click **Save** to save a copy of the report parameter set for that particular report.

# Create a Report Snapshot

A snapshot of a report captures the data from that moment in time. You can refer back to the snapshot to see the data captured at that moment to compare to data viewed when you run the report again. The data in the snapshot will always be the same, even if there have been changes in the data since the snapshot.

***Warning:*** You can create report snapshots only for reports that do not have security permissions assigned.

To create a report snapshot, you must first run the report and save the parameter set. Select the parameter set and click **Create snapshot** on the **Parameter sets** toolbar. Enter a name and description of the snapshot and click **Save**.

***Note:*** When you create a snapshot of a campaign report, the snapshot appears on the campaign record's Snapshot tab. For information about the Snapshot tab, refer to the *Fundraising Guide*.

# Edit a Snapshot

Once you create a snapshot, you can edit the name and description. You cannot alter the data captured in the snapshot. To edit snapshot properties, select it and click **Edit properties** on the **Snapshots** toolbar. Make the necessary changes to the name and description and click **Save**.

# Create Tasks for Reports

You can also create a task for a report to add to a page. Select the report click **Create task** on the report explorer toolbar. You can then specify the functional area on which to add the report. Users going to that functional area would then see the link to the report on the page itself, not on the explorer bar. Access to where the report appears can be restricted based on a user's role in the program. You can also specify to add the shortcut to the report on the home page of users in specific roles.

# Key Performance Indicators

Key Performance Indicators track your organization’s strategic performance. Financial and non-financial matrices are used to assess your business condition and to help you determine a course of action. Monitoring your business activity using KPIs helps you place a value on otherwise difficult to measure activities, such as leadership development.

Depending on the nature of your organization and your strategy, KPIs can help measure the progress toward your goals. For example, your organization may decide to track the total number of gifts generated each month as a performance indicator. Or, if your organization uses direct marketing, you may decide to track the cost per dollar raised for a specific mailing. With KPIs, you can create an instance that defines this indicator. After you create the instance, your organization can view the status of your KPI goals and schedule updates for KPI instances.

# KPI Workflow

You can manage key performance indicators (KPIs) to allow quick access to track goals and progress.

The KPI feature also provides a variety of ways to access the information, such as dashboards, links on records, and RSS feed links you can copy to Internet browsers.

## System Roles Involved in the KPI Process

The KPI process involves three primary roles:

- KPI author: Authoring KPI definitions is available as a customization. If you need definitions beyond those included in the program, contact your in-house developer or your implementation consultant.
- KPI administrator: The administrator creates the KPIs based on data consumer’s requests.

  For example, the major giving manager wants his fundraisers to monitor their performances based on the dollar amount of each fundraiser’s “Qualified” gift opportunities. The manager makes this request to the KPI administrator, who, using the “Opportunities Amount” KPI spec, creates a KPI instance for each fundraiser.
- KPI data consumer: The consumer is the individual interested in viewing the data generated by the KPI.

  Continuing with the KPI administrator example above, the major giving manager and his fundraisers are the KPI data consumers. Because the data consumer’s understanding of the program may be limited, the KPI feature provides many options for granting the consumer access to the data they need.
- Continuing with the KPI administrator example above, because “Opportunities Amount” is a context-sensitive definition, KPI links are added to each fundraiser’s record, allowing him easy access to the KPI data.

  For information about context-sensitive definitions, refer to Context-Sensitive KPIs on page 18.
- The KPI administrator can provide the consumer an RSS feed link, which the consumer can copy to their web browser, allowing them to access up-to-date KPI data without opening the program.

# Types of KPIs

All KPI instances are based on a definition stored in the program catalog. The program includes a number of definitions, but the exact functionality of the KPI depends on the type of information contained in each definition.

***Note:*** Authoring KPI definitions is available as a customization. If you need definitions beyond those included in the program, contact your in-house developer or your implementation consultant.

## Standard KPIs

A standard KPI generates the requested value. Users can then view the data on the KPIs page or with an RSS feed or web page link provided them by the administrator.

## Context-Sensitive KPIs

A context-sensitive KPI is assigned to a specific record. In these cases, the KPI is then available within the context of that record.

For example, the “Number of Prospect Plans” KPI definition is context-sensitive. If you create a new KPI instance for this definition, one of the KPI instance parameters is **Fundraiser**. This is the context record field assigned the KPI in the KPI definition. When you generate this KPI instance, all fundraisers can access the KPI from their record in *Major Giving*. In addition, the individual fundraiser that you identify in the **Fundraiser** field on the Parameters tab of the KPI instance can access the KPI values from his record.

## Dynamic Goal KPIs

A dynamic goal KPI defines the KPI instance goal outside of the KPI instance. This is useful for records that include goal information and for users who want the KPI instance goal to always reflect the record value.

For example, the “Event Registrant Capacity” KPI definition includes a dynamic goal. If you create a new KPI instance for this definition, after you identify the event to use, the **Capacity** value included on the event record defaults to the **Goal value** field on the Goal tab. Registrant information is then always compared to the event capacity goal.

# Access KPIs

To access KPIs, from *Analysis*, click **Information library**, and click the KPIs tab. From this page, you can create, edit, and delete KPI instances, update an existing KPI value, open an instance, and assign permissions.

# KPI Definitions

The program contains several standard KPIs, such as for marketing efforts and fundraising goals.

## Marketing KPIs

The program contains several standard KPIs for marketing mailings. These KPIs are available for both mailings and segments. You can calculate a KPI on the mailing level, the segment level, or across selected mailings and segments.

***Note:*** Marketing KPIs include values from indirect responses in their calculations.

**Average Gift Amount for Mailing/Segment**

For the Average Gift Amount KPI, the program divides the total revenue by the total number of responses to calculate the Average Gift Amount for each mailing or segment.

**Cost Per Dollar Raised for Mailing/Segment**

The Cost Per Dollar Raised for Mailing/Segment KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate the Cost Per Dollar Raised KPI, the program divides the total cost of the mailing or segment (as determined by the precalculations) by the total revenue received as a result of the mailing or segment.

**Number of Responses for Mailing/Segment**

For the Number of Responses KPI, the program displays the total number of distinct gifts received as a result of the mailing or segment.

**Response Rate for Mailing/Segment**

For the Response Rate KPI, the program divides the total number of responses for a mailing or segment by the total number of offers, and multiplies the result by 100.

**Return on Investment (ROI) Amount for Mailing/Segment**

The Return on Investment (ROI) Amount for Mailing/Segment KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate the Return on Investment Amount KPI, the program subtracts the total cost of the mailing or segment from the total revenue received as a result of the mailing or segment.

**Return on Investment (ROI) Percent for Mailing/Segment**

The Return on Investment (ROI) Percent for Mailing/Segment KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate the ROI Percent KPI, the program subtracts the total cost from the total revenue, divides the result by the total cost, and then multiplies the result by 100.

**Total Revenue for Mailing/Segment**

For the Total Revenue KPI, the program displays the total amount of all gifts received as a result of the mailing or segment.

#### Cost Per Renewal for Membership Mailing

For the Cost Per Renewal KPI, the total cost of a membership mailing is divided by the number of renewals that occurred as a result of the mailing.

## Fundraising Goals KPIs

The program contains several standard KPIs to view the effectiveness of fundraising goals.

#### Revenue Growth

For the Revenue Growth KPI, the program compares the revenue activity for two periods of time based on a calendar or fiscal year and displays the revenue growth from one period to the other. To compare the current year to date against the previous year to the same date, select **Year over year (as of)**. To compare the current year to date against the total of the previous year, select **Year over year (breakeven)**. To compare the previous 12 months against the 12 months prior, select **Running year over year**. When you create the KPI, you can select to include only revenue transactions made toward a specific designation or campaign. For example, you can create a Revenue Growth KPI to compare the revenue growth of a designation year over year. By default, the KPI includes all pledges and payments toward a donation or recurring gift that meet the selected criteria.

## Prospects KPIs

The program contains several standard KPIs to view the effectiveness of fundraising plan activity and opportunity details. To access these KPIs, from the Select a KPI screen, expand **Prospects** in the treeview. For information about how to create a KPI, refer to Add KPI Instances on page 21.

#### Average Days in Plan Stage

With the Average Days in Plan Stage KPI, you can determine the average number of days a plan was a categorized as a specific stage. For example, if you determine that major giving plans appear to stay in the “Identification” stage longer than another plan type, you can determine how best to reduce this amount of time.

#### Average Days to a Closed Gift

The Average Days to a Closed Gift KPI show the average number of days from the time the first plan step occurs until the prospect accepts the ask amount.

#### Number of Completed Moves

The Number of Completed Moves KPI displays the number of completed interactions based on the criteria you specify. You can limit the results to steps assigned to a specific team or fundraiser, a pre-defined selection of interactions, steps with a specific date range, plan steps of a certain type or at a selected stage in the process, or by the type of interaction that occurred with the step.

#### Number of Planned Moves

The Number of Planned Moves KPI displays the number of planned or pending interactions based on the criteria you specify. You can limit the results to steps assigned to a specific team or fundraiser, a pre-defined selection of interactions, steps with a specific date range, plan steps of a certain type or at a selected stage in the process, or by the type of interaction that occurred with the step.

**Number of Prospect Plans**

With the Number of Prospect Plans KPI, you can view the number of prospect plans associated with a specific team or fundraiser, a selected plan type or stage, a prospect's status, an amount range, or a certain designation.

**Opportunities Amount**

With the Opportunities Amount KPI, you can view the amount you have or expect to receive based on selected opportunities. You can limit the results to include opportunities assigned to specific team or fundraiser; selected opportunity details such as the type of plan, plan stage, amount range or designation; or, you can include only opportunities with a specific status, such as Response Pending or Accepted. If you choose to include opportunities with an Accepted status, you can select to use the committed amount in the KPI calculation rather than the ask amount.

**Opportunities Amount by Selection**

The Opportunities Amount by Selection KPI displays information about opportunity revenue based on a pre-defined selection of opportunities. For opportunities with a status of Accepted, you can select to include the committed amount in the KPI calculation rather than the ask amount.

**Opportunities Count**

The Opportunities Count KPI displays the number of opportunities that meet the specified criteria.

# Manage KPIs

You can manage KPIs from the KPI Instances page and from the records of KPI instances.

## Add KPI Instances

A KPI instance defines what you want the performance indicator to accomplish.

For example, your event coordinator wants to track registrants for an upcoming event, comparing the number of registrants to the event's capacity. You can create a KPI instance using the "Event Registrant Capacity" KPI definition. After you create and generate a value for the KPI, a link appears in the event record. Depending on permission settings, a user can then access a dashboard displaying the status of the event's registration vs. the event's capacity. The user can also manage the KPI from this page, updating the values, editing the KPI settings, or adding additional KPIs.

***Note:*** For Fundraising KPI instances, a Site filtering tab appears on the KPI instance screen. To enable site filtering, from the Site filtering tab, select **Site filter enabled**. In the **Site** grid, select sites to associate with a KPI instance. The sites you select here in combination with user security setup determine the KPI instances a user can view. When you associate a site with a KPI instance, a filter is created so that only users with rights to sites you select can view the associated KPI instances on the KPI Instances pages and dashboard. For Fundraising KPI instances, not all sites appear as selections in the **Sites** grid. Available sites are determined by permissions and sites assigned to a user's system role. Only those sites assigned to a user through a system role that is associated with the KPI instance add or edit permission appear on the KPI Instances page and dashboard.

## Add a new KPI instance

The Major Giving manager wants to help his primary fundraiser - Jeffrey Andrews - track his performance related to his annual qualified opportunity goal amount, which is $40,000. At this time, he is interested in only the qualified gift opportunities in the “Cultivation” stage of the Major Giving plan. He also wants a performance below 35% designated in red and below 73% designated in yellow. Finally, as milestones, the Major Giving manager wants the fundraiser to satisfy a fourth of his annual requirement every quarter.To accomplish this, he has asked the system administrator to create a KPI instance for the fundraiser.

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. On the action bar, click **Add**. The Select a KPI screen appears.
4. Select the KPI definition on which to base your new instance.

   For this scenario, select “Opportunities Amount,” located in the Prospects folder.
5. Click **OK**. The KPI instance screen appears.
6. On the General tab, enter a **Name** and **Description** for the KPI to help identify it.
7. On the Criteria tab, select the specific information to represent in the KPI instance. The exact fields and options included on the tab depend on the selected KPI definition.

   For information about the definition for a KPI, refer to KPI Definitions on page 19.

   For example, if you select the “Event Registrant Capacity” definition, the **Event** field appears on the Criteria tab so you can select the event for which you want to track registrants. If you select the “Percentage of Revenue Record Count” definition, a **Selection 1** and **Selection 2** field appears on the Criteria tab so you can select the two selections that contain the records on which to base the percentage calculation.

***Note:*** A “selection” is a named set of IDs of the same record type. It has a name and description and is often used as input into a process or report to specify which set of records should be acted on by that process. Because selections consist only of IDs, they are optimized for peak processing speed. For information about selections, refer to the *Query and Export Guide*.

   For this scenario, using the “Opportunities Amount” definition, you must complete the following fields:

   a. When using either a Fundraiser or Major Giving KPI definition, you can filter KPI results based on an organizational team created in **Manage Organization Hierarchy**. An **Organizational team** field is included as a filter on the Criteria tab of the KPI Instance screen. Enter or select the team you want to include.

   b. In the **Fundraiser** field, click the magnifying glass at the end of the field to access the Fundraiser Search screen and locate the fundraiser. For this scenario, locate “Jeffrey Andrews.” This is a required field.

   c. In the **Ask date filter** field, you can select the time period for which you want data. For this scenario, the Major Giving manager requested data for the “current fiscal year.”

   d. In the **Plan type** field, you can select to restrict the data collected to a specific giving plan. For this scenario, the manager requested data for just the “Major Giving” plan.

e. In the **Plan stage** field, you can select to restrict the data collected to a specific stage of the selected **Plan type**. For this scenario, the manager requested data in the “Cultivation” stage of the Major Giving plan.

f. In the **Prospect status** field, you can restrict the data collected to a specific prospect status, such as “Identified” or “Stewardship.” For this scenario, the major giving manager made no **Prospect status** request, so leave the field blank to include all prospect statuses.

g. In the **Amount range** field, you can restrict the data collected based on the opportunity amount ranges. For this scenario, the major giving manager made no amount range request, so leave the field blank to include all ranges.

h. In the **Designation** field, click the magnifying glass at the end of the field to access the Designation Search screen and locate a designation. For example, you may want to include only Annual Campaign designations in the KPI. For this scenario, the major giving manager made no designation request, so leave the field blank to include all designations.

i. In the **Opportunity statuses** frame, you must select at lease one status to include in your KPI. For this scenario, the major giving manager requested “Qualified” opportunities, so mark the **Qualified** check box.

***Note:*** You must complete all required fields on the Criteria tab before you can proceed to the next tab.

8. Select the Preview tab.
9. In the **As of** field, select the date as of when to view the results of the value that satisfies the set parameters of the KPI and click **Preview**. The value that satisfies the set criteria as of the selected date appears.

   For example, you completed the Criteria tab to satisfy the major giving manager’s request for the current fiscal year. You can now view this fundraiser’s qualified opportunities amount as of the end of the first month of the fiscal year.

   The **Value as of date** field displays the opportunities amount for the selected fundraiser as of the date you entered.
10. Select the Goal tab.
11. In the **Overall goal** field, enter this KPI instance goal. For a dynamic goal KPI definition, the **Overall goal** defaults to the goal associated with the record selected on the Criteria tab.

    For this scenario, the major giving manager said this fundraiser’s annual qualified opportunity goal amount is $40,000, so enter “40,000” in the **Overall goal** field.

***Note:*** For information about dynamic goals, refer to Dynamic Goal KPIs on page 18.

12. In the **Good target** and **Satisfactory target** fields, enter the amounts or select the percentages to represent in red and in yellow as warnings for under performance.

    For this scenario, the manager requested that values running at less than 35% of goal display red, so enter 35% in **% of overall goal** for the **Good target**; he requested that values running at less than 73% of goal display in yellow, so enter 73% in **% of overall goal** for the **Satisfactory target**; any values running above 73% display in green.
13. Under **Milestones**, click **Add** to create milestones to track progress.

For example, in this scenario, the Major Giving manager wants the fundraiser to satisfy a fourth of his annual requirement every quarter.

a. In the **Milestone date** field, enter the date of the milestone, such as the first quarter end date.

b. In the **Milestone goal** field, enter the amount to reach by the milestone date.

c. In the **Good target** and **Satisfactory target** fields, enter the amounts to represent in red and in yellow, as warnings for under performance.

   For this scenario, the manager did not specify, so accept the system defaults.

d. Click **OK**. In the grid, the new milestone appears.

e. Repeat steps a-d for each additional quarter.

14. Select the History tab.
15. Select whether to archive all history records generated with each instance update or only a select number of recent records. These values are used to create the trend graph for the KPI instance.

***Note:*** For Fundraising KPI instances, a Site filtering tab appears on the KPI instance screen. To enable site filtering, from the Site filtering tab, select **Site filter enabled**. In the **Site** grid, select sites to associate with a KPI instance. The sites you select here in combination with user security setup determine the KPI instances a user can view. When you associate a site with a KPI instance, a filter is created so that only users with rights to sites you select can view the associated KPI instances on the KPI Instances page and dashboard. For Fundraising KPI instances, not all sites appear as selections in the **Sites** grid. Available sites are determined by permissions and sites assigned to a user's system role. Only those sites assigned to a user through a system role that is associated with the KPI instance add or edit permission appear on the KPI Instances page and dashboard.

16. Click **Save**. You return to the KPI instances page. In the grid, a gray icon appears to the left of the new instance to indicate that a value for the instance has not yet been generated. For information about how to generate values, refer to Generate Values for a KPI Instance on page 26.
17. After you generate the KPI value, if the KPI definition used to create the KPI is context-sensitive, KPI links appear on the related record type.

    For example, the scenario used in this procedure included a context-sensitive KPI definition with the context record field "Fundraiser." As a result, a **Manage KPIs** link is added to all "fundraiser" record types. In addition, we identified "Arthur Andrews" as our specific "fundraiser for this KPI, so two links are added to his "fundraiser" record: **Manage KPIs** and **KPI dashboard**.

# View KPI Data

After you add a KPI instance, depending on the type of KPI created, you can access its information a number of ways.

## From a Record

If you select a context-sensitive KPI definition when you create the KPI, links appear on the related record type.

For example, you add a KPI instance to your system based on the Major Giving "Opportunities Amount" KPI definition. This definition is based on the "Fundraiser" record type. When you create your KPI, you select **Fundraiser** "Arthur Andrews," identifying the specific fundraiser record to which you want the KPI assigned.

***Note:*** For information about how to add KPIs to your system, refer to Add KPI Instances on page 21.

In addition, depending on permission settings, the **Manage KPIs** link appears under **More information** on all fundraiser records so any fundraiser can create Major Giving KPIs.

## From the Web

With the RSS feed included on the KPI instances page, users can easily access up-to-date information they need without opening the program. Simply send your users the RSS feed link, which they can copy into their Internet browser and add to the **Feeds** list. For more information, refer to Manage RSS Feed on page 31.

## From Vista or 7 Viewer Gadgets

*Windows Vista* and *Windows 7* users can access a "Gadgets" CAB file which includes a number of KPI viewer gadgets. You can add these gadgets, which display selected KPI information, to your desktop.

## From Yahoo! Widgets

*Windows XP* users who cannot use the *Windows Vista* gadgets can use Yahoo! widget compatibility to add a free-floating KPI widget to their desktops. The widget displays information about the selected KPI instances and is updated regularly. For more information, refer to Create Yahoo! Widgets for a KPI Instance on page 31.

### Manage KPIs from a record

1. Open the record associated with the KPI instance.

   For example, if you added a KPI instance to your system based on the Major Giving "Opportunities Amount" KPI definition, this definition is based on the "Fundraiser" record type, so open the record of the fundraiser specified in the KPI instance or any fundraiser record.

   ***Note:*** Exactly what appears on a record depends on the permission settings for the KPI. For more information, refer to Assign KPI Permissions on page 26.

2. Under **More information**, click **Manage KPIs**. The KPI instances page for the selected record appears.
3. Manage the KPI instance as necessary.

- Add a new KPI instance. The KPI definitions available are limited to only those assigned to the corresponding record type. For more information, refer to Add a new KPI instance on page 22.
- Generate KPI values for a selected instance. For more information, refer to Generate values for a selected KPI instance on page 26
- Assign task permissions. For more information, refer to Assign KPI Permissions on page 26.

# Assign KPI Permissions

You can control system role permissions granted to each individual KPI instance. When a user assigned the specific role opens the program, only KPIs for which they are granted permission appear.

For example, you create a KPI instance to track registrant capacity for an upcoming event. As a result, links to the KPI are added to the event record and event support staff has access to event records; however, only event coordinators should have access to these links. Using the **Assign Permissions** functionality, you can assign event coordinators access to the links and deny access to all other system roles.

***Note:*** For more information about system roles and security, refer to the *Security Guide*.

### Set user permissions for KPI instances

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the KPI instance for which to assign permissions.
4. On the action bar, click **Assign Permissions**. The Assign KPI Instance Permissions screen appears.
5. Under **System Roles**, select the checkboxes for the roles to access the KPI.

   ***Note:*** To deny a role access, do not select its checkbox. To clear all existing assignments, click **Clear all**.
6. Click **Save**. You return to the KPI Instances page.

# Generate Values for a KPI Instance

After you create a KPI instance, you can generate the values associated with its settings whenever necessary. When you generate values, the selected KPI record opens and displays details about the indicator values. For information about KPI instance records, refer to KPI Instance Record on page 28.

***Note:*** To generate KPI values, you can also create an *SQL Server* agent job or *Windows* scripting file. For more information, refer to or Create a Windows Scripting File to Generate KPI Values on page 31.

### Generate values for a selected KPI instance

For information about how to create a KPI instance, refer to Add KPI Instances on page 21.

1. From *Analysis*, click **Information library**. The information library appears.

2. Click the KPIs tab.
3. In the grid, select the instance for which to generate values.
4. On the action bar, click **Update KPI value**. The Update KPI screen appears.
5. Select whether to view data based on the current date or another date.
   - If you select **Process once using current date**, the program creates one history record relative to the current date.

***Note:*** We recommend you back date values for new KPI instances, when trend information does not exist. After you create a KPI instance, you can schedule a business process to update its values. Each time the process runs, the program creates a new KPI instance history record for the values of the date the process runs.

   - If you select **Back-date**, the program creates several history records for the time period determined by the selected interval such as “every 3 months” or “every 7 days”. For example, if you back date a KPI for a year with an interval of every three months, the program create four history records, one of each quarter.

   If you select **Back-date**, enter the start and end dates for which to view data. In the **Interval** field, enter the interval by which to generate data.

***Warning:*** When you back date a KPI instance, you erase any values that fall within the specified date range previously stored for the instance.

6. Click **Start**. The program updates the KPI values and displays the record of the instance. For more information about the items on the record, refer toKPI Instance Record on page 28.

# Import and Export KPI Definitions

If you have a KPI definition defined and saved outside the program, you can import the definition as a valid *.xml document. for use in the program. You can also export any KPI definitions from the program as a valid XML document.

### Import a KPI definition

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. Under **KPI**, click **Import KPI definition**. The Open screen appears.
4. Map to the definition file to import.
5. Click **Save**. The KPI is added to the system.

### Export a KPI definition

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the instance to export and select the KPI instance name. The record of the instance appears.

4. Under **Tasks**, click **Export definition**. The Open screen appears.
5. Select **Save File** and click **OK** to export the KPI to the default download folder.

## Organize KPIs

You can organize KPIs to make them easier to navigate in the information library.

- To mark a KPI as a favorite, click the star next to the KPI's name.
- To move KPIs to folders, select "Folder" in the **View by** field. Select the KPI or KPIs you want to move, and click **Move**. In the Move KPIs to folder screen, select a folder and click **Save**.
- To create and edit folders and arrange them in hierarchies, click **Manage folders**.
- To view different details about your KPIs, click **Columns** and select the columns you want to see on the list. You can also filter columns to only see KPIs that meet certain criteria.

# KPI Instance Record

The KPI instance record displays details about the indicator values. When you update KPI values, the record appears. The information that appears on the record is based on the parameter selections used when you generate the values. For more information about how to update KPI values, refer to Generate Values for a KPI Instance on page 26.

## Goal Status

The Goal status tab displays status information related to the KPI goals. In the **Show** field under **Percent of goal**, you can select to view data for the overall goal or the milestone goal. In the **Show** field under **KPI value chart**, select the time period for which to view status information. You can select a predefined time period or a custom period. If you select Custom, **Start date** and **End date** fields appear so you can define the time span. Also, if you select Custom, you must click **Go** to update the status. If you select a predefined option, the display automatically updates after you make your selection.

## Goal Status History

The Goal status history tab tracks KPI status changes. For example, if a KPI's status changes from red to yellow or from yellow to green. In addition, this tab is compatible with the **Custom Email Alerts** feature, allowing you to track select KPIs by directing the application to email you every time the status changes. For more information about Email Alerts, refer to the *Administration Guide* .

## Recent Status

The Recent status tab displays information about the most recent KPI instance update. For example, if the update “Completed,” dates and times of the last update, number of records processed, number of exceptions, and much more.

# History

Each time you run a KPI process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the KPI process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

***Note:*** For information about how to create a KPI instance, refer to Add KPI Instances on page 21.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

# Job Schedules

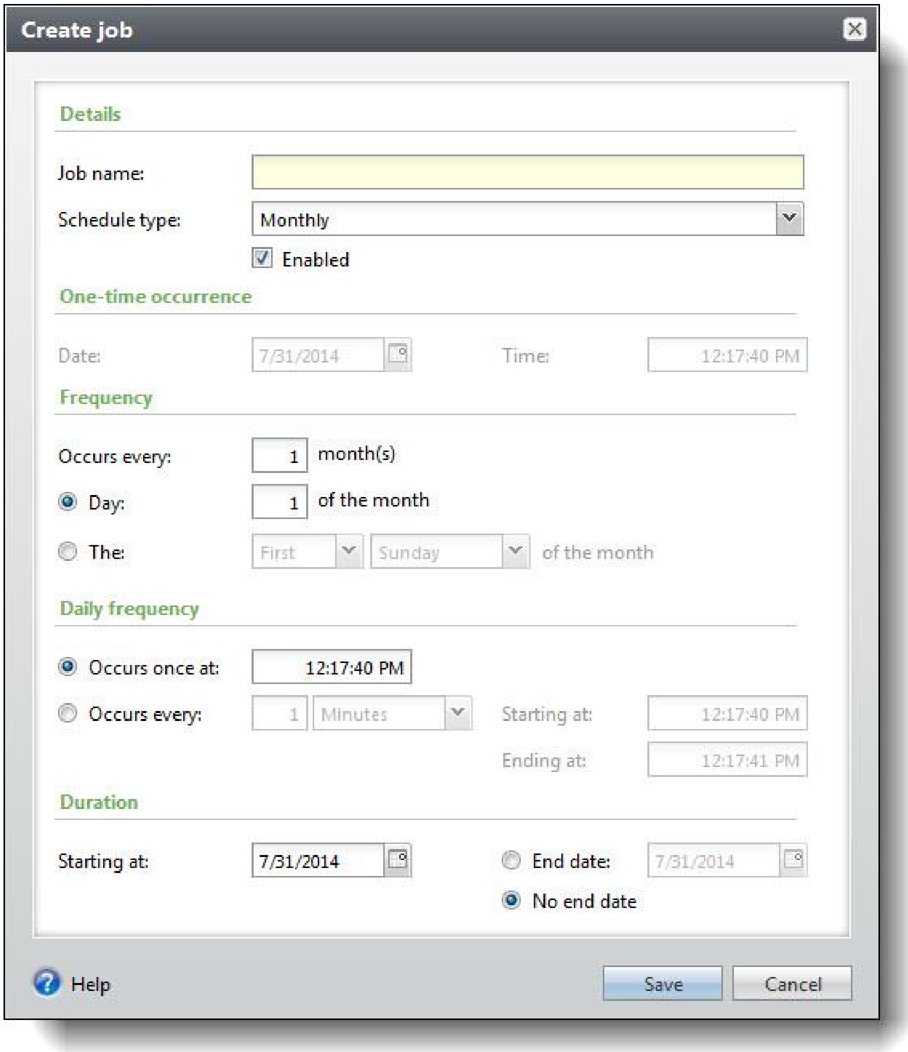
You can create a job schedule to automatically generate KPI instance values, such as during off-hours. This job scheduler uses the SSIS packages, which can make web service calls to the program so you can create a *SQL Server Agent* job through the program shell. You can use *SQL Server Agent* jobs to generate KPI instances automatically and opt to run the task on a recurring basis. When you create a job schedule, you define the conditions that cause the job to run.

## Add a Job Schedule

When you click the **Add** button on the Job schedule tab, the Create job screen appears. From this screen, you define your automated job schedule.

### Add a New Job Schedule

1. From the Job Schedules tab, select **Add**. The Create job screen appears.




2. In the **Job name** field, enter a name for the job schedule. This will help to identify the job schedule.
3. Select the **Schedule type** for the job. The schedule type dictates when and how often a job schedule will run.
4. The job schedule is **Enabled** by default. To suspend the job schedule, deselect the **Enabled** checkbox.
5. If the **Schedule type** is set to "One time," the One-time occurrence options will be available. Select the **Date** and **Time** for the job schedule to run.
6. If the **Schedule type** is set to Daily, Weekly, or Monthly, the Frequency, Daily frequency, and Duration options will be available. Use these options to determine exactly when and how often the schedule will run.

***Note:*** The Frequency, Daily frequency, and Duration options will change depending on the selected **Schedule type**.

7. Select **Save**.

# Create Yahoo! Widgets for a KPI Instance

With the Yahoo! *Widget Engine*, you can run applications called “widgets” on your desktop. You can add KPI widgets to your desktop so you can view the most up-to-date values every time you turn on your computer.

***Note:*** Before you can use the Yahoo! widget functionality, you must download the free Yahoo! *Widget Engine* from http://widgets.yahoo.com/.

### Create a KPI Yahoo! widget

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the process for which to create a widget.
4. On the action bar, click **Go to KPI instance**. The record of the instance appears.
5. Under **Tasks**, click **Create Yahoo! widget**. A zip archive that contains the widget files will download.
6. Unzip the files and double click the Yahoo Widget file.
7. The program creates a widget for the selected KPI.
8. To view the widget, double-click on its icon. To view the graph and thermometer representation of the KPI value, click the **Trend** field.

# Manage RSS Feed

You can enable your KPI data consumers can monitor KPI values from outside of the program. On a KPI Instance record, select the Goal Status History tab. Select **More** and click **View RSS feed**. Your web browser opens and displays the updates for the KPI instance whenever the status changes from one threshold value to another.

You can provide the address of the web page to your KPI data consumers. With the web address, they can then subscribe to the feed, add it to their **Microsoft Feeds** list, and generate up-to-date KPI data from their web browser at any time.

# Create a Windows Scripting File to Generate KPI Values

The program allows you to create a *Windows* scripting file (*.wsf) to schedule and run a process to update KPI values. For information about *Windows* scripting files, visit the Microsoft website at http://msdn.microsoft.com/library/.

# Key Performance Indicator Dashboard



All users have a personal dashboard, displaying Key Performance Indicator data. The KPI dashboard stores all KPI values and statistic information in an easy to view format.

The dashboard includes data from every KPI instance for which the user has permission. For information about establishing permission settings, see Assign KPI Permissions on page 26.

You can customize the dashboard view, making it even easier to access the specific information you need. You can also export the information to Microsoft *Excel* or generate a PDF.

## View KPI Dashboards

Whenever you generate values for a KPI instance, the values are automatically added to the KPI dashboard.

Dashboards are permission-based, so only KPIs for which you have permission appear on the dashboard panel.

### View KPI data from a dashboard

1. To view the dashboard, either click the **KPI dashboard** link from the Data page, or if you are working on the KPI instances page or in a KPI instance record, click the **KPI dashboard** link in the **Tasks** pane on the left side of the screen. The KPI dashboard page appears.

   In addition, if can access an context-sensitive KPI instance dashboard from your record in the program. For more information, see Types of KPIs on page 18.

***Note:*** For information about accessing the Data page or the KPI instances page, see Access KPIs on page 18 or KPI Instance Record on page 28.

2. From the KPI dashboard page, in the **Time span** field, select the time period for which you want to view status information. You can select a predefined time period or a “Custom”

period. If you select “Custom”, **Start date** and **End date** fields appear, allowing you to define your time span. Also, if you select “Custom”, you must click the **Go** button to update the status display. If you select a predefined option, the display automatically updates after you make your selection.

3. The dashboard includes the following information:
   - A color-coded line displaying the KPI status
   - A graph displaying KPI value trends
   - The data represented in the thermometer and graph

# Customize KPI Dashboard

The **Customize dashboard** option allows you to arrange your dashboard to meet your specific needs. For example, if your KPI dashboard page includes value information for 20 or 30 KPI instances, you spend a good deal of time scrolling through this very long list, trying to locate specific instance information. With **Customize dashboard**, you can create different dashboard pages on which to store specific instance data. You can also arrange information in tabs, making it easy to access different instance data while working on the same page.

### Customize KPI dashboard

1. From the KPI dashboard page, click **Customize dashboard**. The Customize KPI dashboard screen appears. All KPI instances appear in the left pane.

***Note:*** For information about accessing the KPI dashboard page, see View KPI Dashboards on page 32.

2. To create new dashboard page, in the right pane, click **New page**.
3. In the **Page** field, enter a name for your page.
4. A tab structure appears in the bottom half of the right pane. Drag any instances you want to include on the page to a corresponding tab.
5. Double click on the tab and enter a new tab name.

   For example, if you have Major Giving and Revenue KPI instances, you may want to create two pages, one housing all Major Giving instances and another housing all Revenue instances. To accomplish this, follow these steps:

   a. After you click **New page**, enter “Major Giving” in the **Page** field.
   b. In the left hand pane, select the first Major Giving instance and drag it to Tab 1.
   c. Double click on the tab name and rename the tab to better identify the instance.
   d. Click the **New tab** button and continue adding Major Giving instances until your page is complete. You can also add more than one instance to a tab.
   e. When you finish creating the Major Giving page, click **Save**. You return to the KPI dashboard page.
   f. Click **Customize dashboard** to reopen the Customize KPI dashboard screen and create a Revenue page. Repeat steps a-e, creating a Revenue page.

6. When you finish creating your pages and return to the newly customized KPI dashboard page, a **Page** field now appears. Use this field to select the page you want to display. If you added tabs, your new tabs also display, each housing value information related to the assigned KPI instance.

# Manage KPIs

While working in the **KPI dashboard**, you can access the KPI instances page by clicking **Manage KPIs**.

# Export KPI Dashboards

You can easily share KPI dashboard data with users outside the program. In addition to printing out the dashboard page, you can also export the information, creating either an *Excel* spreadsheet or a PDF.

***Note:*** You can also export to *Excel* and *Acrobat* PDF from the web view. For more information, see View Web Dashboard on page 1.

### Export a KPI Dashboard data to an Excel spreadsheet

1. From the KPI dashboard page, right click.
2. Select **Export**, **Excel**. The Save as screen appears.
3. Select a **Save in** location.
4. Enter a **File name** for the *Excel* spreadsheet about to be generated.
5. Click **Save**. The dashboard information is saved to the new spreadsheet.

### Export a KPI Dashboard data to a PDF

1. From the KPI dashboard page, right click.
2. Select **Export**, **Acrobat (PDF) file**. The Save as screen appears.
3. Select a **Save in** location.
4. Enter a **File name** for the PDF about to be generated.
5. Click **Save**. The dashboard information is saved to the PDF.

# Web Dashboard



The Web Dashboard presents information from your database in one consolidated location using dynamic tools such as lists, charts, gauges, and web content from external web sites. Users customize the content, appearance, and layout of the parts and pages that make up the Web Dashboard site. Other users can view or manipulate parts for their own needs. For example, users can select the dates or records displayed in the part. Administrators can define permissions so only specified users have view or edit rights for the site, pages, and parts.

Parts on the same page can be connected so they share data. Using a part's embed code and direct URL, you can embed the part in other web applications, or use it with Microsoft *Vista* or *7* gadgets or *Yahoo!* widgets.

## Blackbaud Dashboard Page

Use the Blackbaud Dashboard home page to organize your site. If you use multiple databases, you can select the database you want to use for the site. Once you select a database, you access the Folder Contents page. On this page you can set site and page permissions and add pages and folders.

### Site Options

Using the options under the **Site Options** field, you can specify which system roles have rights to edit the site or parts.

| Option | Description |
|---|---|
| **Edit Site Privileges** | Assign rights to roles. Options include the ability to personalize pages, add new pages, assign page permissions, and add, edit, or delete folders. |
| **Edit Part Privileges** | Assign add or edits rights to dashboard parts that are secured. |

# Folder Options

You can organize pages by adding folders to your site. The **Folder options** field appears on the Folder Contents page of the dashboard.

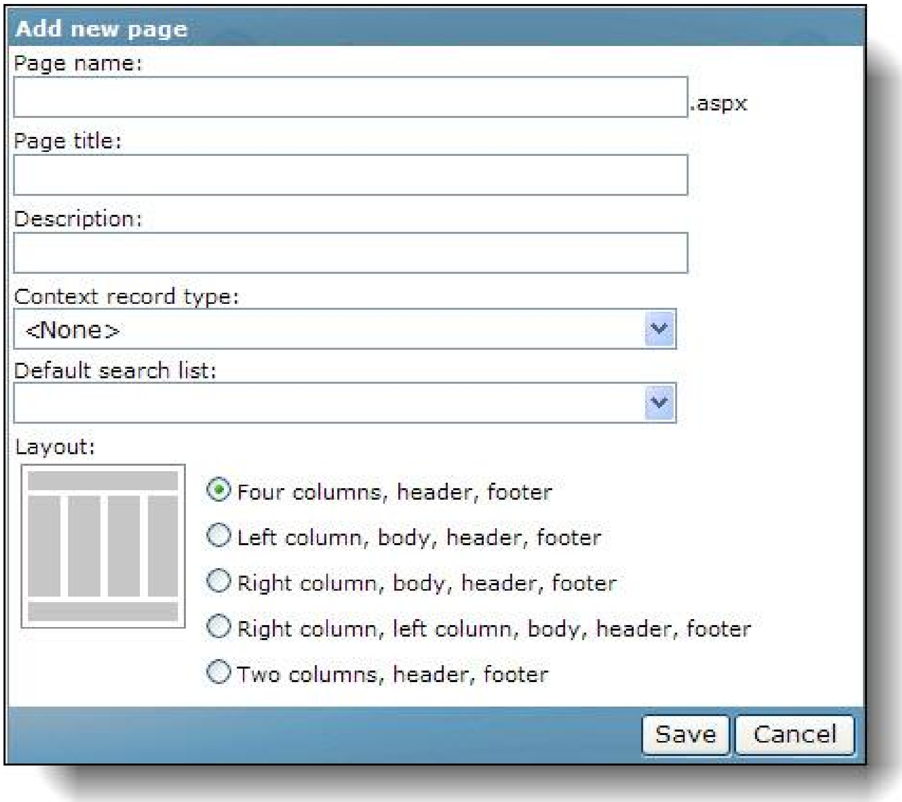
| Option | Description |
|---|---|
| **Add new page** | Add a new page to this folder. For more information, refer to Add Pages on page 36. |
| **Import page** | Import an existing dashboard page using an page definition file. You can export a page definition file using the **Export page** option under **Page options**. For more information about exporting, refer to Page Options on page 37. |
| **Add new folder** | Add a new sub-folder to this folder. |

# Add Pages

When you add pages to the site, you define basic properties for the page as well as the layout and context record type.

### Add a page

1. From the Blackbaud Dashboard page, if you use multiple databases, select the database to use. The Folder Contents page appears.
2. Select **Folder options**, **Add new page**. The Add new page screen appears.




3. In the **Page name** field, enter the file name for the page.
4. In the **Page title** field, enter a title for the page.
5. In the **Description** field, enter a description of the page.
6. In the **Context record type** field, select a record type to base the dashboard on.
7. In the **Default search list** field, select a search type. The options available depend on the context record type you selected.
8. In the **Layout** field, select the web page layout. When you select a layout, a preview appears on the left demonstrating column, header, and footer positions for each layout.
9. Click **Save**. You return to the Folder Contents page which displays a link to the new page.

# Page Options

The **Page options** field appears on the page view of the dashboard.

| Page Option | Description |
|---|---|
| **Edit personal version of this page** | Displays the personal version of the page in edit mode. Any changes you make to the personal version are visible only to you. |

| Page Option | Description |
|---|---|
| **Edit shared version of this page** | Displays the shared version of the page in edit mode. Any changes you make to the shared version are visible to any users who view this page. |
| **Show shared view** | From the personal version, select this option to display the shared view of the page. |
| **Show personal view** | From the shared version, select this option to display the personal view of the page. |
| **Reset page content** | When editing the personal version, select this option to remove all personalization settings from the page. |
| **Edit page information** | Edit the page name, title, description, context record, or default search list. |
| **Copy page** | Make a copy of the page. |
| **Move page** | Move the page to a different folder. |
| **Export page** | When editing the shared version, select this option to export the shared settings for the page. You can save the page definition file and later import it using the **Import page** option under **Folder options**. For more information about importing, refer to Folder Options on page 36. |
| **Edit permissions** | Set view and edit rights for the page. |
| **Delete page** | Deletes the page. |

# Edit Pages

After adding a new page, you can edit the personal or shared version. When editing, you can add parts to the page and connect them so they share information.

### Edit a page

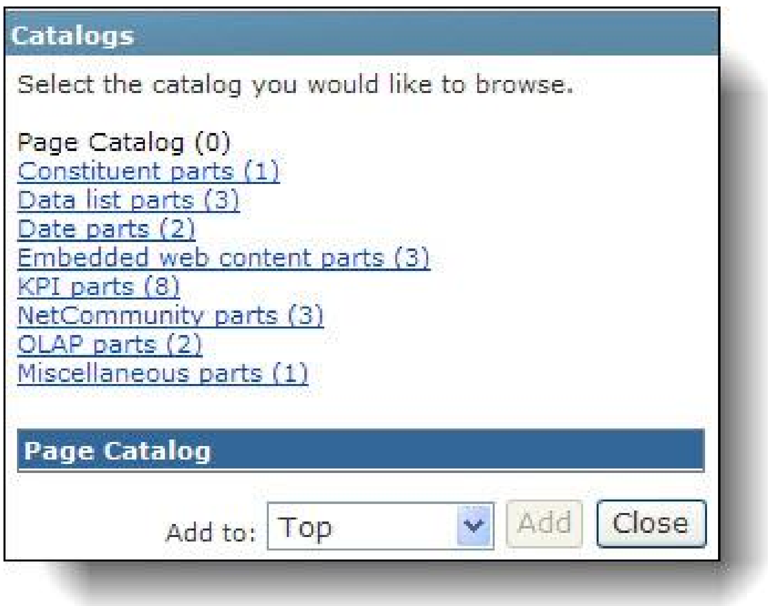
1. From the Folder Contents page, click the page to edit. The Page options page appears.
2. Select **Page options**, **Edit personal version of this page** or **Page options**, **Edit shared version of this page**. The personal version or shared version of the page appears. Any changes you make to the personal version are visible only to you. Any changes you make to the shared version are visible to any users who view this page.
3. You can edit existing dashboard parts on this page or add additional ones. For more information about how to add dashboard parts, refer toAdd Parts on page 39.
4. You can connect parts so they share data. For more information, refer to Add Connections on page 42.
5. Click **Exit edit mode** to return to the view mode of the page.

# Add Parts

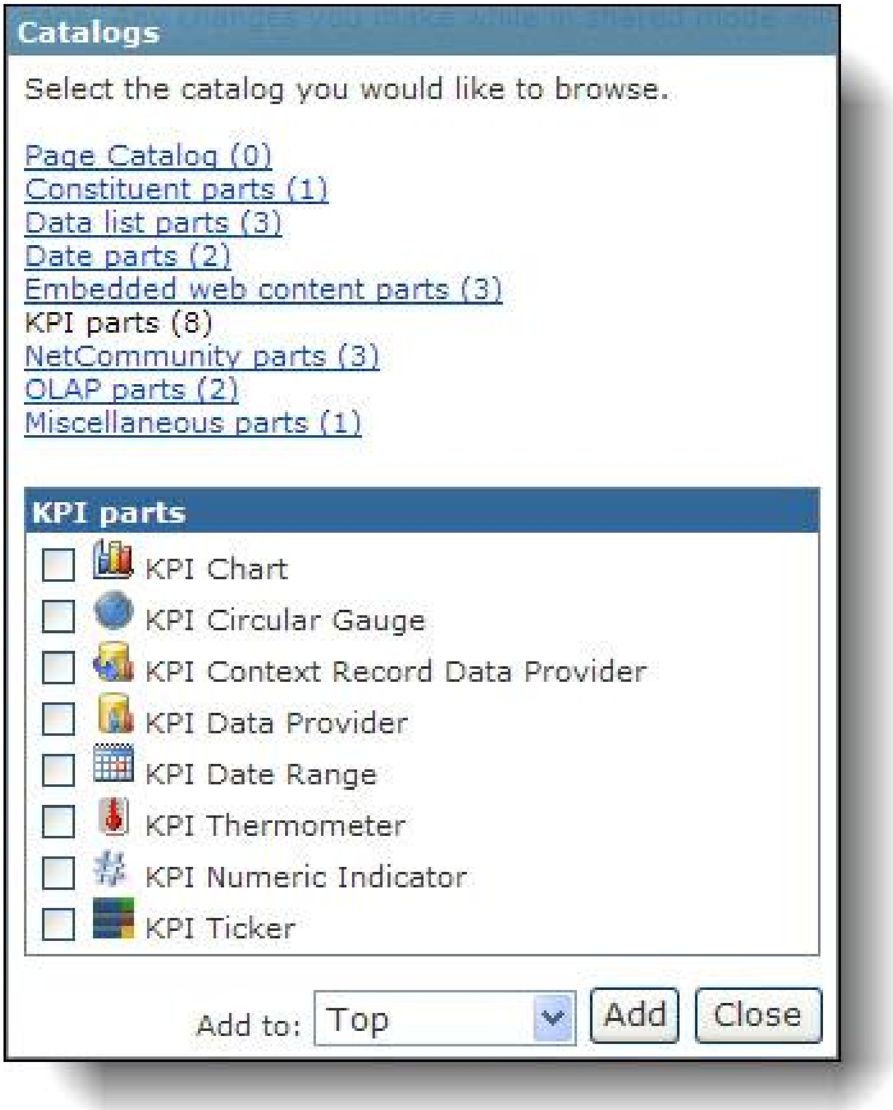
You can add several different types of dashboard parts such as Date and Data list parts, as well as Embedded web content parts.

## Add dashboard parts to a page

1. From a page, select **Page options**, **Edit personal/shared version of this page**. The edit view appears.
2. Click **Add dashboard item**. The Catalogs screen appears.

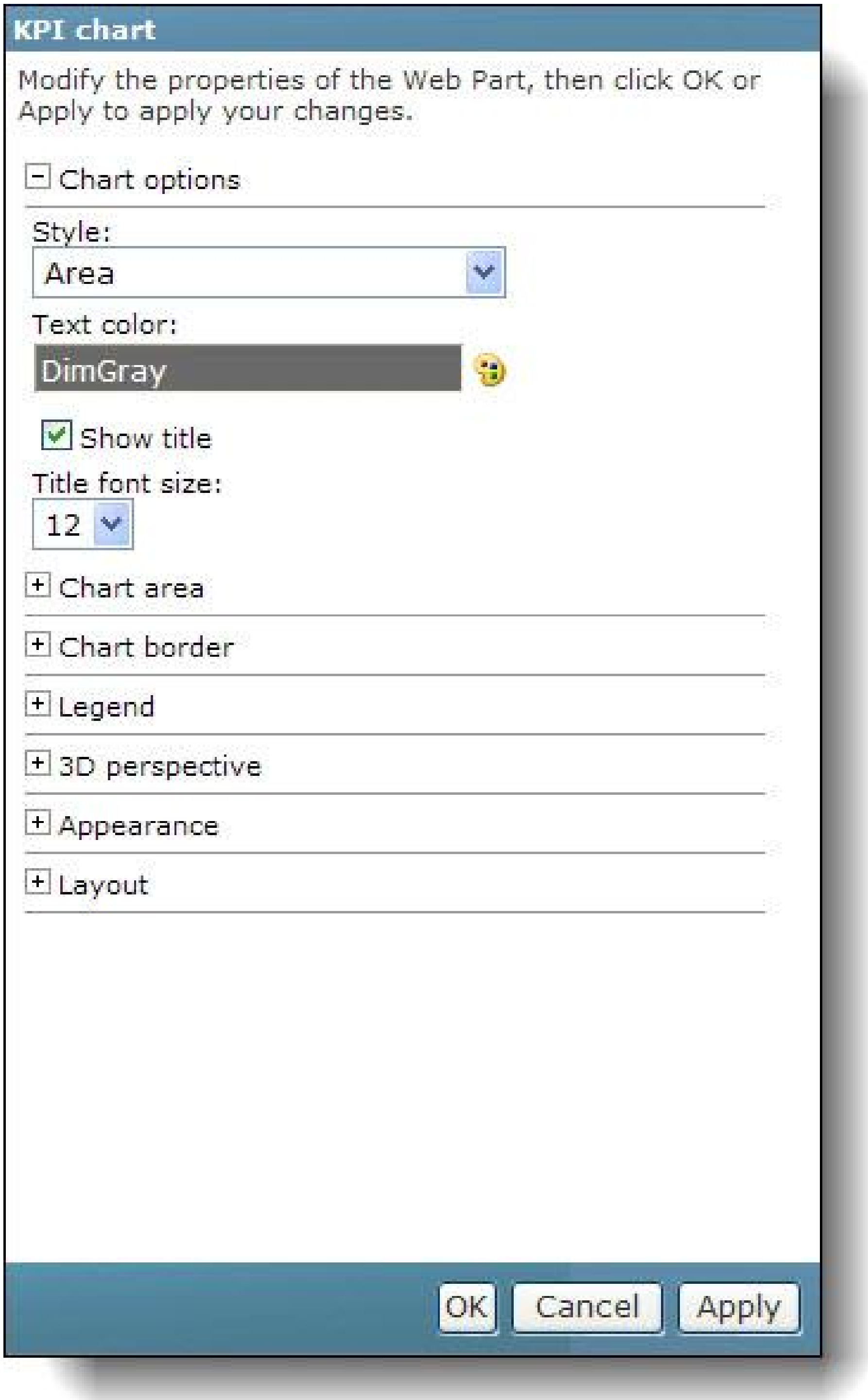



3. Select the catalog of parts to browse. When you select a catalog, all the parts available for that type appear.




When you hover your cursor over a part type, a description of the part appears.

4. Select the parts to add.
5. In the **Add to** field, select the area of the page to place the part. For example, if you selected a “Two columns, header, footer” layout for this page, you can place the part in the Top, Left, Right, or Bottom zone.
6. Click **Add**. If the part has formatting options, such as Properties, Appearance, and Layout, a screen appears so you can select these.




7. Click **OK**. You return to the page and the dashboard part appears in the selected zone.
8. If you are using *Internet Explorer* as your browser, you can drag and drop dashboard parts to different zones. If you are using any other browser, to move a part, click **Edit** to access the properties screen. In the Layout section, select a different zone.

> ***Tip:*** For certain part types, a Web properties icon appears when you hover over the part. When you click the icon, the Properties screen appears displaying the part's embed code and direct URL. You can use these to embed the part in other web applications, or to use with Microsoft *Vista*or *7*gadgets or *Yahoo!* widgets.

9. Continue to add dashboard parts to the page or click **Exit edit mode** to return to the page.

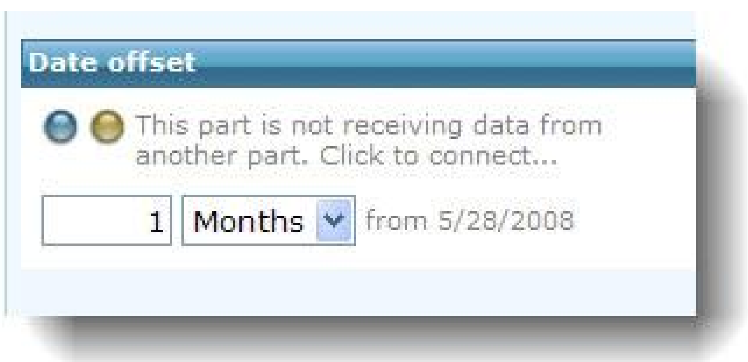
# Add Connections

You can connect parts so that one part provides data to other parts to be used for different purposes. For example, you can connect Calendar Date Picker, Date Offset, and KPI Numeric Indicator parts so that users can compare KPIs for a selected date with KPIs for the same date in the previous month. Because the parts are connected, when a user selects a different date for the KPIs, the previous month's date updates automatically.

> ***Tip:*** "Provider" parts provide data to other parts. "Consumer" parts receive data from other parts. Some parts can be both providers and consumers.

### Connect dashboard parts

1. From the edit view of a page, add the parts you want to connect, making sure that at least one of them is a provider.
2. Place your cursor over the yellow button for the consumer part. This message appears:




3. Click the yellow button on the consumer. The provider and consumer parts start blinking.


4. Click the blue button on the provider part.


5. Click the yellow button on the consumer part. The parts connect.


Calendar date picker
5/28/2008
Date offset
Currently receiving data from 1 other web part. Click to edit connections...
1
Months
from 5/28/2008

# Report Options



This chapter includes information about the various report options available, such as print and export.

## Reports Toolbar

When you generate a report, you can use the report toolbar to modify how you view the report. The toolbar buttons are common to all reports.

| Toolbar item | Description |
|---|---|
| **First Page** | On a report with multiple pages, click this button to return to the first page. |
| **Previous Page** | On a report with multiple pages, click this button to return to the previous page. |
| **Current Page** | The chronological number of the selected page appears. To navigate to a specific page, enter the page number and press **ENTER**. |
| **Next Page** | On a report with multiple pages, click this button to return to the previous page. |
| **Last Page** | On a report with multiple pages, click this button to go to the last page. |
| **Refresh** | To refresh information to include new or updated data, click this button. |
| **Export** | To select a file format for exporting, click this button. File types include XML file with report data, CSV (comma delimited), TIFF file, pdf file, Web archive, *Excel*, and *Word*. **Note:** In exported reports, such as PDF versions of the reports, some items may appear as links. These currently direct you to the Blackbaud website, instead of to the specific records in the program. |
| **Search Text** | To search the report for a word or phrase, enter the text in this field and click Find. |
| **Find** | To search for text entered in the Search Text field, click this button. |
| **Next** | To search for the next instance of text in the Search Text field, click this button. |

# Microsoft Excel Add-In



Programs built on Blackbaud's Infinity platform can integrate with Microsoft *Excel 2007* or *2010* for easy access to Infinity data from within a spreadsheet. You can take advantage of the tools in *Excel*, such as graphs and pivot tables, to present and analyze the data. The data is pulled from the Infinity database and can be refreshed each time the spreadsheet is opened or can be refreshed on demand.

## Set Up Microsoft Excel Add-In

To install the Microsoft ***Excel*** Add-in, you can use a utility on the Utilities, Gadgets, and Reference page that you access from the application start page. After you install the add-in, a Blackbaud tab appears on the ribbon in ***Excel***. You can then select ad-hoc queries, data lists, or KPIs in the program to create spreadsheets with data from your database. For more information about how to install the add-in, refer to the *Installation Guide* and the *Update Guide*.

## Data Options in Excel

You can display data from your database in the spreadsheet using ad-hoc queries, data lists, or KPIs. After you display data in the spreadsheet, you can use the standard tools in *Excel* to format, graph, and analyze it.

**Ad-hoc Query in Excel.** On the Blackbaud tab, click **From Ad-hoc Query** to display data from an Infinity ad-hoc query. The results of the query — the fields and data from the results tab of the ad-hoc query — appear in the spreadsheet.

**Data Lists in Excel.** On the Blackbaud tab, click **From Data List** to select an Infinity data list. Many data lists require a record to be selected so the data is in context. For example, the "Constituent 5 Year Giving" data list needs a constituent record for context. When you select this data list, you must also select a constituent. The information from the data list, including fields and parameters, is displayed in the spreadsheet. You can change the parameters to update the information in the fields.

**KPIs in Excel.** On the Blackbaud tab, click **From KPI** to select an Infinity KPI instance. The KPI instance must already exist in order for the data to display in a spreadsheet.

**Smart Query in Excel.** On the Blackbaud tab, click **From Smart Query** to display data from an Infinity smart query. The results of the query — the fields and data from the results tab of the smart query — appear in the spreadsheet.

***Note:*** Query results are restricted to 500 records. If your results exceed the 500 record limit, you can save your query and create an export instead of using the Excel Add-in functionality.

# Appeal Reports



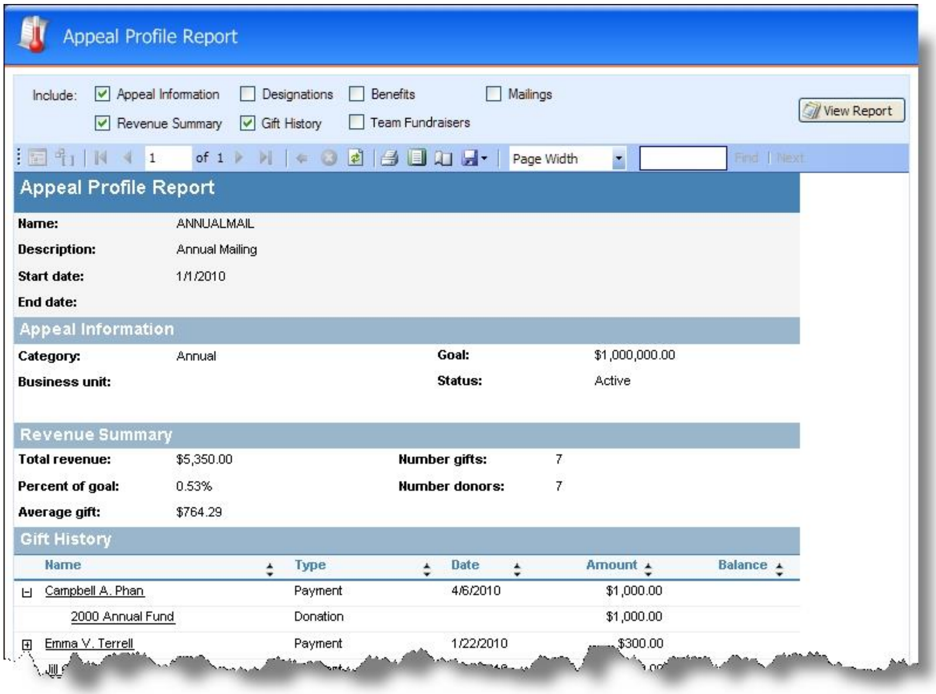
Appeal reports help you evaluate the performance of your efforts to communicate with your constituents to raise funds. You can generate and view several reports to determine and compare the effectiveness of your appeals, appeal mailings, and communication plans.

## Appeal Profile Report

The Appeal Profile report shows information about an appeal such as designations, benefits, associated mailings, and revenue information. To run the report from *Marketing and Communications* or an appeal record, click **Appeal profile** under **Reports**. When you run the report from *Marketing and Communications*, you must search for and select the appeal for which to generate the report. After you select the appeal, the Appeal Profile page appears.

***Note:*** To access the Appeal Profile report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal profile**.

To run the report, select the type of information to include and click **View Report** in the parameter area.




If you select **Revenue Summary**, the report displays the total amount of revenue, the total number of gifts, and the average gift amount received in response to the appeal.

If you select **Gift History**, the payments associated with the appeal and applied toward donations, pledge installments, and recurring gift payments appear. For each payment, you can view the constituent, date, and amount associated the revenue. To view the applications of a payment, click the plus sign (+). For each application, you can view the designation and amount associated with the revenue.

***Note:*** Under **Revenue Summary**, the **Total revenue** field displays the total amount of all revenue transactions associated with the appeal. Under **Gift History**, the **Amount** column displays only the amount of each transaction applied toward donations, pledge installments, or recurring gift payment. Therefore, the sum of the amounts under **Gift History** may not equal the total revenue amount.

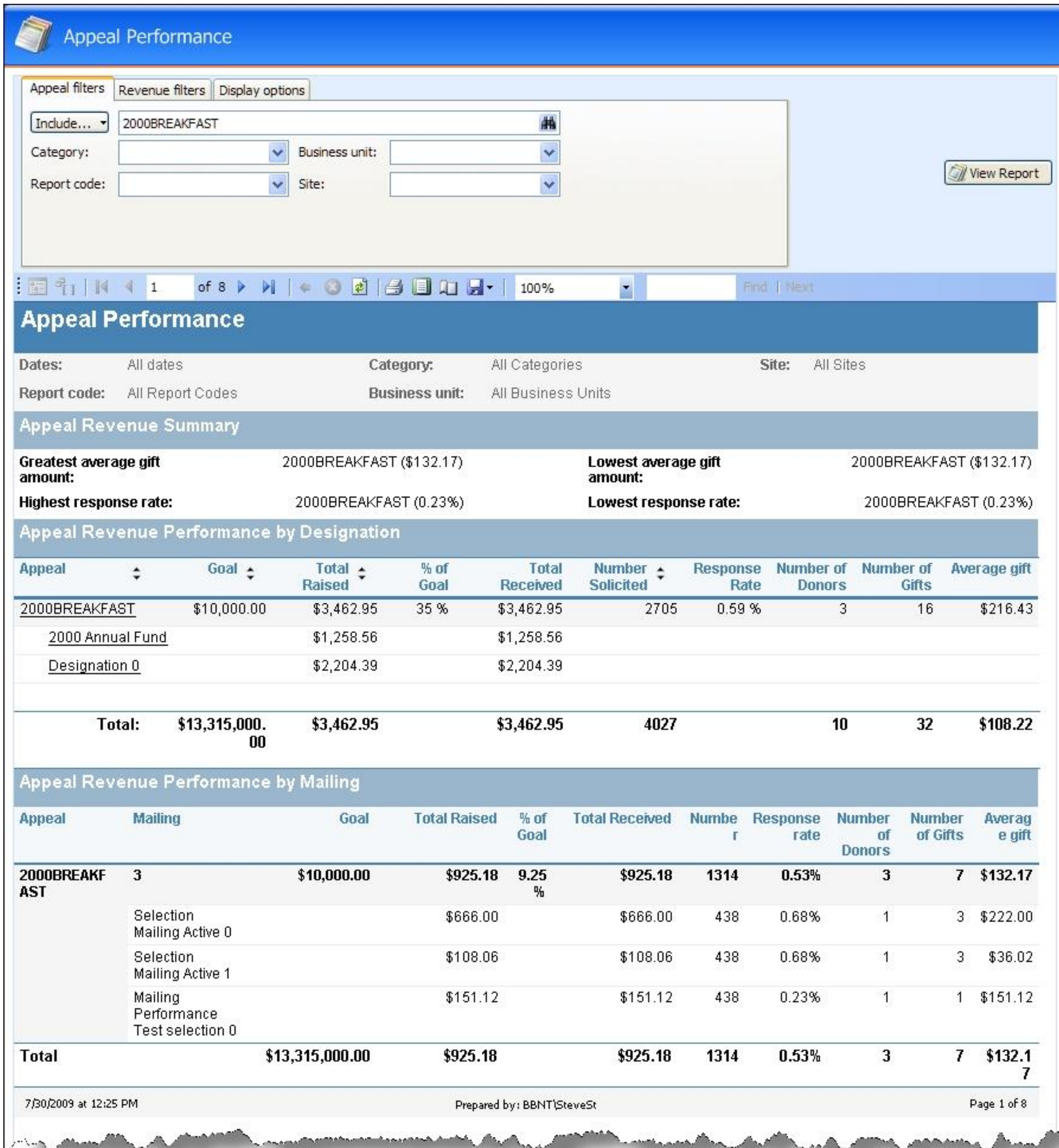
You can print the report or export it in several different formats.

# Appeal Performance Report

The Appeal Performance report provides information about the effectiveness of your appeals. When you generate the report, you can select to view information about a single appeal or multiple appeals. You can filter the appeals and revenue information included in the report by various criteria, such as the appeal's category or the date of the revenue transactions.

***Note:*** The Appeal Performance Report includes recurring gift revenue. The revenue counts toward the appeal on the recurring gift payment, not the appeal on the recurring gift.

You can also select to organize the results by the associated designations or the revenue generated by each mailing. You can select whether to view cost information about the appeals or generate charts to represent the comparison of multiple appeals. To access the Appeal Performance report from *Marketing and Communications*, click **Appeal performance** under **Reports**. To run the report, select the criteria of the appeals to include in the report and the information to generate and click **View Report**.




- On the Appeal filters tab, select the appeals to include in the report. You can include all appeals, an appeal selection created in *Query*, or a specific appeal. If you select Appeal selection or Specific appeal, click the binoculars to search for and select the appeal or selection of appeals to include. You can also select the criteria of the selected appeals to include, such as category or report code.

***Note:*** To compare the effectiveness of only two appeals, you can also use the Appeal Period Comparison Report. With this report, you can compare two separate appeals during like time periods, such as by quarter of their respective fiscal years. For information about this report, see Appeal Period Comparison Report on page 51.

- To filter the revenue associated with the appeals included in the report by the dates of the transactions, select the Revenue filters tab and enter the start and end dates of the transactions to include.
- On the Display options tab, select whether to display the revenue associated with each designation or mailing of the selected appeals. You can also select whether to display cost information for the appeals and generate charts to represent the comparison of multiple appeals.

Under **Appeal Revenue Summary**, the report displays which of the selected appeals have the highest and lowest response rates and average gifts.

Under **Appeal Revenue Performance**, the report provides a detailed breakdown of the revenue performance of each selected appeal, including the goal amount, the total raised toward the goal, the total received toward the appeal, the number of constituents solicited through the appeal, and the response rate. If you select **Break down by designation**, you can also view the performance of each designation associated with the appeals.

If you select **Break down revenue by mailing**, the report provides a detailed breakdown of the revenue performance of each selected appeal by mailing, including the total received as a response to each mailing and the response rate and average gift amount for each mailing.

If you select **Display appeal cost**, the report displays a summary of the total cost of the selected appeals. Under **Appeal Cost Summary**, you can view highlights of positive performance and potentially negative performance of the selected appeals with revenue transactions, such as based on return on investment (ROI). Under **Appeal Cost Performance**, the report provides a detailed breakdown of the cost performance of each appeal with revenue transactions, including the number of mailings, total raised, cost, and profit.

If you select **Include charts**, the report provides graphs to represent the total raised toward the goal, average gift amount, and response rate of each appeal. If you select both **Include charts** and **Display appeal cost**, the report provides graphs to represent information such as the ROI percentage and total raised compared to total cost of each appeal with revenue transactions. With these graphs, you can quickly compare the effectiveness of multiple appeals.

You can print the report or export it in several different formats.

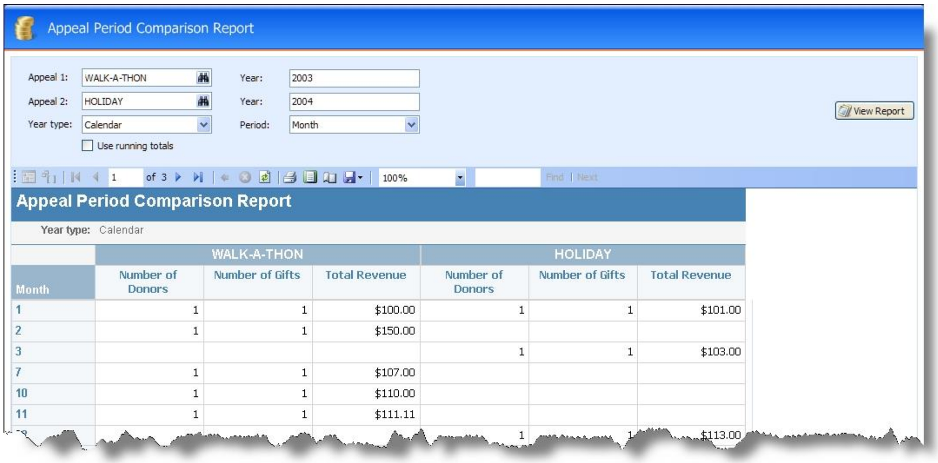
# Appeal Period Comparison Report

The Appeal Period Comparison report compares the effectiveness of two separate appeals during like time periods. For example, you can use this report to compare two separate annual appeals by quarter of their respective fiscal years. The report includes all pledges and all payments toward donations and recurring gifts received for each appeal during their respective years. Each appeal must have an established start date. The report does not include any revenue received after the first year of an appeal.

When you generate the report, you can select whether to base the comparison on the calendar or fiscal year and by which interval. You can also select whether the charts generated by the report display running totals during the selected time period of the appeals. To access the Appeal Period

Comparison report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal period comparison**. The Appeal Period Comparison Report page appears.

***Note:*** To compare the effectiveness of multiple appeals, you can also use the Appeal Performance Report. You can include all appeals or a selection of appeals in this report, such as to compare overall effectiveness. For information about this report, see Appeal Performance Report on page 49.



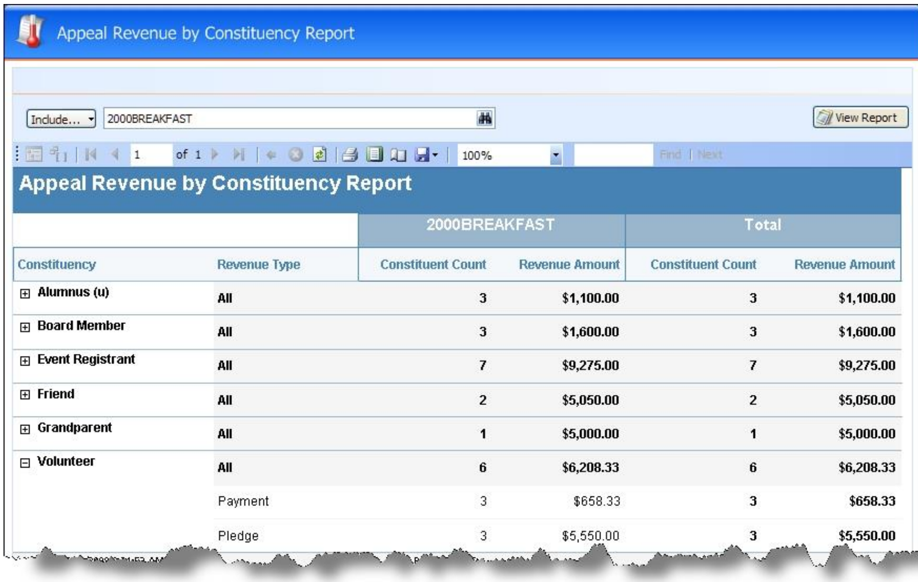

To run the report, select the appeals, years, and time period to compare and click **View Report**. The report compares the performance of the selected appeals over one year from their respective start dates. The comparison displays the total revenue received and the number of donors and gifts received for each appeal at the selected intervals.

The report also generates charts to quickly compare the number of gifts and total revenue received for each appeal during each interval. If you select **Use running totals**, the charts display graphs to represent the totals over the selected intervals.

You can print the report or export it in several different formats.

# Appeal Revenue by Constituency Report

The Appeal Revenue by Constituency report provides information about the effectiveness of your appeals by constituency response. When you generate the report, you can select to include information about a single appeal or about multiple appeals, such as to compare effectiveness. To access the report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal revenue by constituency**. The Appeal Revenue by Constituency Report page appears.




| | | 2000BREAKFAST | | Total | |
|---|---|---|---|---|---|
| Constituency | Revenue Type | Constituent Count | Revenue Amount | Constituent Count | Revenue Amount |
| Alumnus (u) | All | 3 | $1,100.00 | 3 | $1,100.00 |
| Board Member | All | 3 | $1,600.00 | 3 | $1,600.00 |
| Event Registrant | All | 7 | $9,275.00 | 7 | $9,275.00 |
| Friend | All | 2 | $5,050.00 | 2 | $5,050.00 |
| Grandparent | All | 1 | $5,000.00 | 1 | $5,000.00 |
| Volunteer | All | 6 | $6,208.33 | 6 | $6,208.33 |
| | Payment | 3 | $658.33 | 3 | $658.33 |
| | Pledge | 3 | $5,550.00 | 3 | $5,550.00 |

To run the report, select the appeals to include in the report and click **View Report**. You can include all appeals, an appeal selection created in *Query*, or a specific appeal. If you select Appeal selection or Specific appeal, click the binoculars to search for and select the appeal or selection of appeals to include.

The report displays a breakdown of the constituencies of the constituents who responded to the selected appeals. For each appeal, you can view how many constituents of each constituency responded and the revenue amount received from each constituency. You can also break down the revenue received from each constituency by revenue type such as payments and pledges.

You can print the report or export it in several different formats.

# Appeal Mailing Indirect Responses Report

The Indirect Responses report provides detailed information about responses from donors who did not receive the appeal mailing, but gave a gift that was associated with the appeal mailing anyway. As long as they are unresolved, these gifts cannot be credited to a specific mailing. The gift is associated with the appeal itself, but not a specific appeal mailing. This report is available from an appeal mailing, under **Reports**.

# Appeal Mailing Unresolved Responses Report

The Unresolved Responses report provides detailed information about responses from donors who received the appeal mailing, but gave a gift that was associated to the appeal, but not the specific mailing. As long as they are unresolved, these gifts cannot be credited to a specific mailing. The revenue is counted toward the appeal, but not toward the specific mailing. This report is available from an appeal mailing, under **Reports**.

# Appeal Mailing Revenue Report

The Revenue report displays the revenue a specific mailing generates for your organization. Revenue from unresolved or indirect responses to the appeal mailing is not counted toward the appeal mailing; however, that revenue is counted toward the appeal itself. This report is available from an appeal mailing, under **Reports**.

# Batch Entry Reports



Several reports are available to help you track records entered in a batch and correct the exceptions generated when you commit a batch.

## Batch Control Report

On the Commit parameters screen, when you select **Create control report**, you can view a control report after you commit the batch to the database. The control report lists records in the batch that were committed to the database and provides information about each record. The information that appears depends on the type of batch selected. For example, a control report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. By default, a revenue batch control report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.


Enhanced Revenue Batch Control Report

1 of 1 Find | Next

Enhanced Revenue Batch Control Report

| | | | | | |
|---|---|---|---|---|---|
| Batch number: | 56 | Projected #: | 4 | Projected total: | $1,250.00 |
| Status: | Committed | Committed #: | 4 | Current total: | $1,250.00 |
| Owner: | BBNT\Ba | | | | |
| Exception batch number: | | Payments: | 4 | Total payments: | $1,250.00 |
| | | Pledges: | 0 | Total pledges: | $0.00 |
| | | Recurring gifts: | 0 | Total recurring gifts: | $0.00 |
| | | MG claims: | 0 | Total MG claims: | $0.00 |

| Constituent Name | Constituent Lookup ID | Date | Revenue Type | Amount | Payment Method | Appeal | Designation / Event |
|---|---|---|---|---|---|---|---|
| Max G. Taylor | 77 | 1/09/2014 | Payment (donation) | $500.00 | Check | NEWSLETTER | Library Fund |
| John T. Smith | 71 | 1/09/2014 | Payment (donation) | $150.00 | Cash | NEWSLETTER | Library Fund |
| Mary Young | 8-10000137 | 1/09/2014 | Payment (donation) | $100.00 | Check | NEWSLETTER | Library Fund |
| Kenneth Parker | 125 | 1/09/2014 | Payment (donation) | $500.00 | Cash | NEWSLETTER | Library Fund |

1/09/2014 at 2:41 PM  Prepared by: BLACKBAUD\Ba  Page 1 of 1

You can view a batch control report on the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **View control report**.

You can also view a control report from the commit status page of a batch. Under **Reports**, select **View control report** from the Explorer bar.

# Batch Exception Report

When you commit a batch to the database, the batch commit status page appears and displays the number of records that did and did not commit to the database. Records that did not commit are called exceptions. A batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. The information that appears depends on the type of batch selected. For example, an exception report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.


You can view a batch exception report on the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **View exception report**.

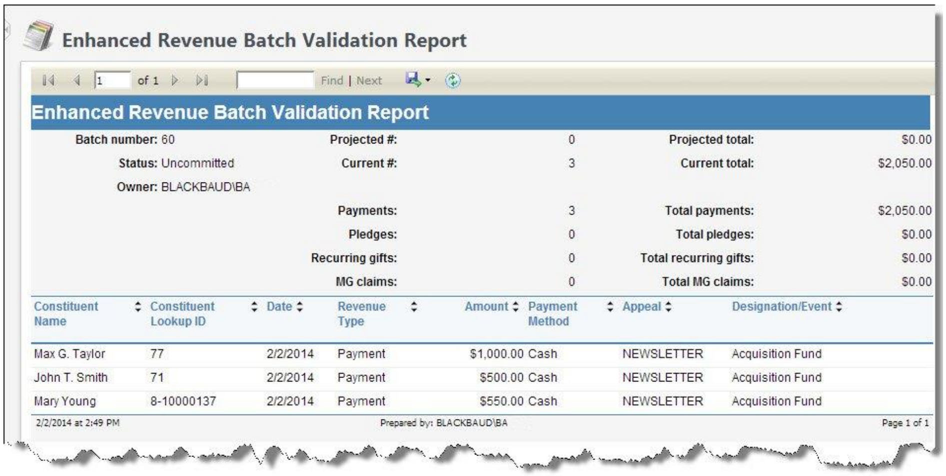
You can also view an exception report from the commit status page of a batch. Under **Reports**, select **View exception report** from the Explorer bar.

# Revenue Batch Validation Report

For an enhanced revenue batch, the Enhanced Revenue Batch Validation Report displays the number and properties of the batch; calculates the total count and monetary amount of the payments, pledges, recurring gifts, and matching gift claims in the batch; and lists the transactions entered in the batch.

For revenue update batches, the Revenue Update Batch Validation Report compares the values of each of the fields in the batch with what is already in the database and displays which fields are being changed in the batch, what the previous value was, and what the new value is.

For each transaction listed, the report provides the constituent associated with the transaction, revenue type, amount of the revenue, date associated with the transaction, and designations to which the revenue is applied. By default, a revenue batch validation report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.


Enhanced Revenue Batch Validation Report

1 of 1 Find | Next

Enhanced Revenue Batch Validation Report

| | | | | |
|---|---|---|---|---|
| Batch number: 60 | Projected #: | 0 | Projected total: | $0.00 |
| Status: Uncommitted | Current #: | 3 | Current total: | $2,050.00 |
| Owner: BLACKBAUD\BA | | | | |
| | Payments: | 3 | Total payments: | $2,050.00 |
| | Pledges: | 0 | Total pledges: | $0.00 |
| | Recurring gifts: | 0 | Total recurring gifts: | $0.00 |
| | MG claims: | 0 | Total MG claims: | $0.00 |

| Constituent Name | Constituent Lookup ID | Date | Revenue Type | Amount | Payment Method | Appeal | Designation/Event |
|---|---|---|---|---|---|---|---|
| Max G. Taylor | 77 | 2/2/2014 | Payment | $1,000.00 | Cash | NEWSLETTER | Acquisition Fund |
| John T. Smith | 71 | 2/2/2014 | Payment | $500.00 | Cash | NEWSLETTER | Acquisition Fund |
| Mary Young | 8-10000137 | 2/2/2014 | Payment | $550.00 | Cash | NEWSLETTER | Acquisition Fund |

2/2/2014 at 2:49 PM Prepared by: BLACKBAUD\BA Page 1 of 1

You can view the Enhanced Revenue Batch Validation Report from the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to an enhanced revenue batch to expand its row. On the action bar, click **Validation report**.

# Marketing Effort Reports



With marketing effort reports, you can track the performance of marketing plans, appeals, selections, and marketing efforts across your system.

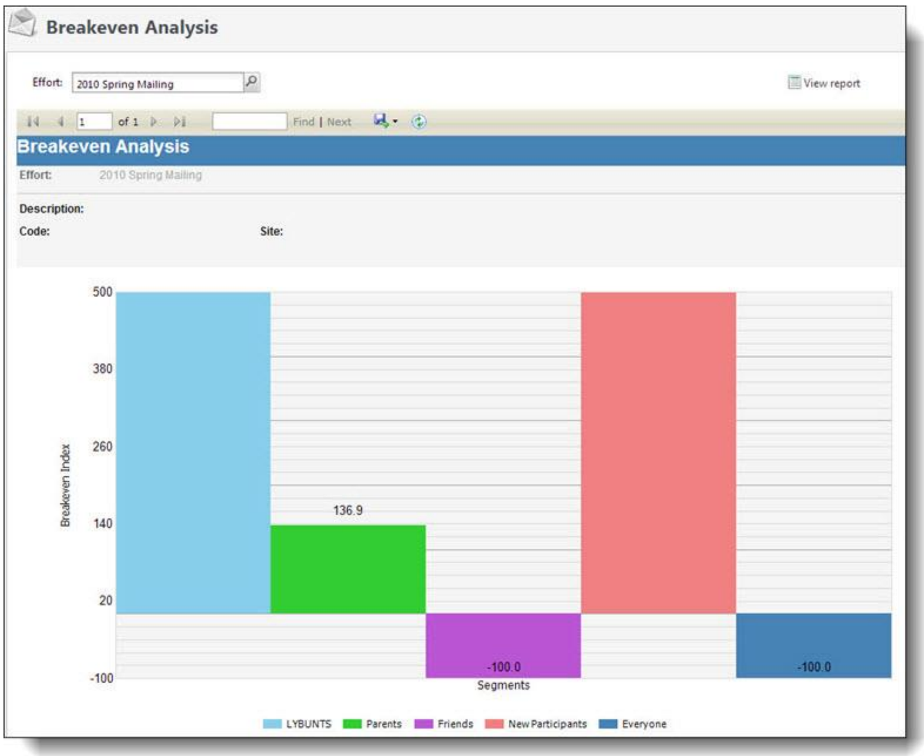
## Ask Ladder Response Report

The ask ladder response report provides information about how ask ladders perform across a selection of marketing efforts. For each ask ladder, the report displays the response rate to each ask amount. To run the report, on the Membership Renewal Efforts page, click **Ask ladder response** under **Reports**, search for and select the selection of marketing efforts to analyze, and click **View report**.

# Breakeven Analysis Report

The Breakeven analysis report determines when the net profit generated by a segment exceeds the cost to send a marketing effort to the segment. For marketing efforts, a review of the Breakeven analysis report shows how a segment performed relative to its peers.

To run the report, click **Breakeven analysis** under **Reports** on a marketing effort record. The report appears.




The **Effort** field displays the marketing effort. To search for another marketing effort to analyze, click the binoculars. A search screen appears.

To calculate the Breakeven (BE) figure, the program uses the following calculations:

(cost per piece)[1] / (net profit from a single sale)[2]

- 1: Cost per piece. The cost per piece from the Package for a given segment.
- 2: Net profit from a single sale. Donation Amount - (cost per piece + fixed cost per piece[3])
  - 3: Fixed cost per piece. The Fixed Cost from the Mailing Budget / Total number of Offers for the Breakeven index (BEI)

[(Response Rate[1] - BE[2])] * 100

- The segment Response Rate. Number of responders / Number of Offers
- BE. The Breakeven calculated above.

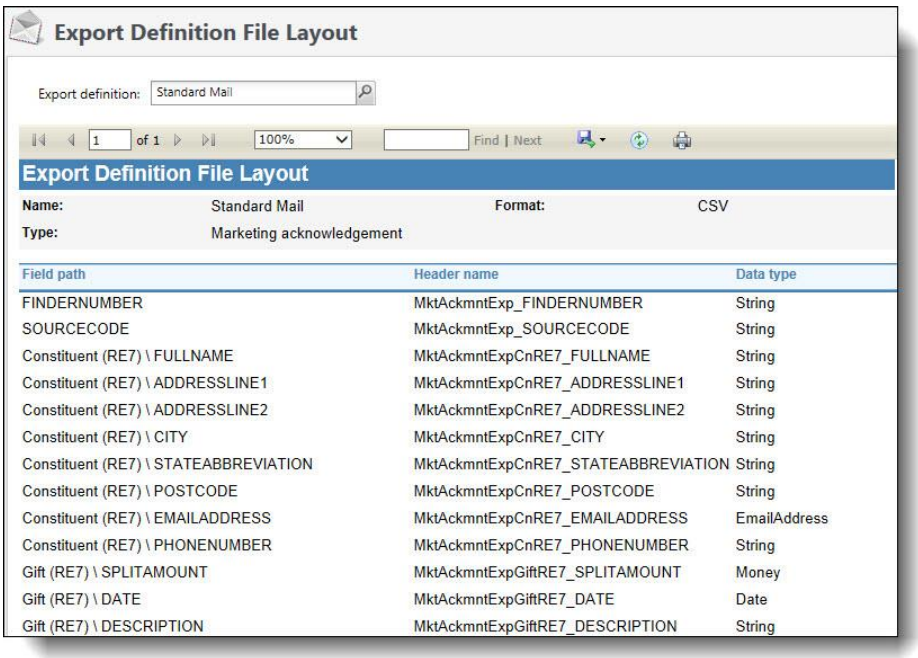
Results:

- > 0: The segment made money
- 0: The segment broke even
- < 0: The segment lost money

# Export Definition File Layout Report

The Export definition file layout report provides detailed information about the export definitions associated with marketing efforts. This report lists the output fields that match fields in the export definition. It includes field paths, header names, and the type of data. This report is sent with the export file to indicate what to expect in the file.

To run the report, go to *Marketing and Communications* and click **Export definitions** under **Configuration**. Then on the Export Definitions page, click **Export definition file layout** under **Reports**. The report appears.



Export Definition File Layout

Export definition: Standard Mail

1 of 1 100% Find | Next

Export Definition File Layout

| | | | |
|---|---|---|---|
| **Name:** | Standard Mail | **Format:** | CSV |
| **Type:** | Marketing acknowledgement | | |

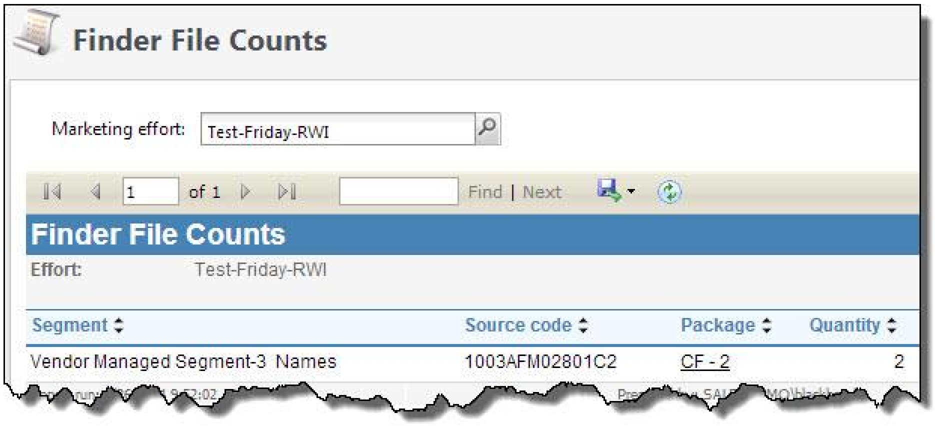
| Field path | Header name | Data type |
|---|---|---|
| FINDERNUMBER | MktAckmntExp_FINDERNUMBER | String |
| SOURCECODE | MktAckmntExp_SOURCECODE | String |
| Constituent (RE7) \ FULLNAME | MktAckmntExpCnRE7_FULLNAME | String |
| Constituent (RE7) \ ADDRESSLINE1 | MktAckmntExpCnRE7_ADDRESSLINE1 | String |
| Constituent (RE7) \ ADDRESSLINE2 | MktAckmntExpCnRE7_ADDRESSLINE2 | String |
| Constituent (RE7) \ CITY | MktAckmntExpCnRE7_CITY | String |
| Constituent (RE7) \ STATEABBREVIATION | MktAckmntExpCnRE7_STATEABBREVIATION | String |
| Constituent (RE7) \ POSTCODE | MktAckmntExpCnRE7_POSTCODE | String |
| Constituent (RE7) \ EMAILADDRESS | MktAckmntExpCnRE7_EMAILADDRESS | EmailAddress |
| Constituent (RE7) \ PHONENUMBER | MktAckmntExpCnRE7_PHONENUMBER | String |
| Gift (RE7) \ SPLITAMOUNT | MktAckmntExpGiftRE7_SPLITAMOUNT | Money |
| Gift (RE7) \ DATE | MktAckmntExpGiftRE7_DATE | Date |
| Gift (RE7) \ DESCRIPTION | MktAckmntExpGiftRE7_DESCRIPTION | String |

In the **Export definition** field, select the export definition to analyze. To refresh the data after you make a selection, click **Refresh**.

# Finder File Counts Report

The Finder file counts report provides details about finder files associated with a marketing effort. The report includes the segments, source codes, packages, and number of records included.

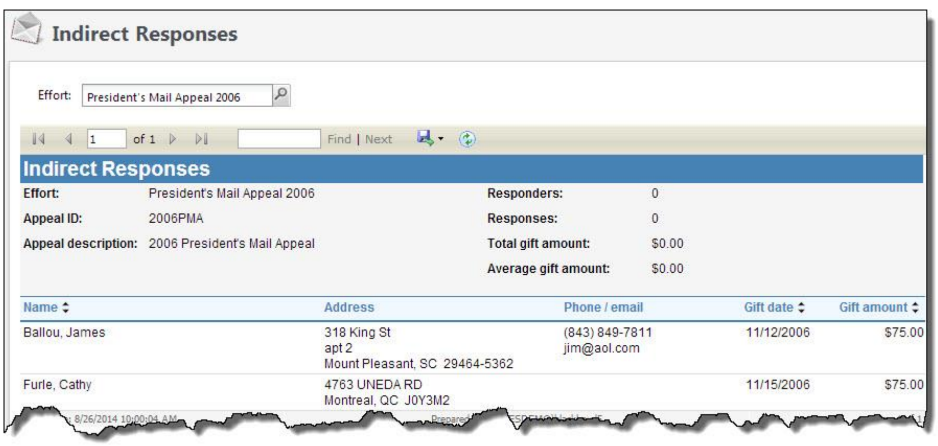
To run the report, click **Finder file counts** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.




# Indirect Responses Report

The Indirect responses report lists donors who were not included in a marketing effort but who gave a gift that was somehow associated with the appeal and marketing effort ID.

To run the report, click **Indirect responses** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.




# Marketing Exclusions Report

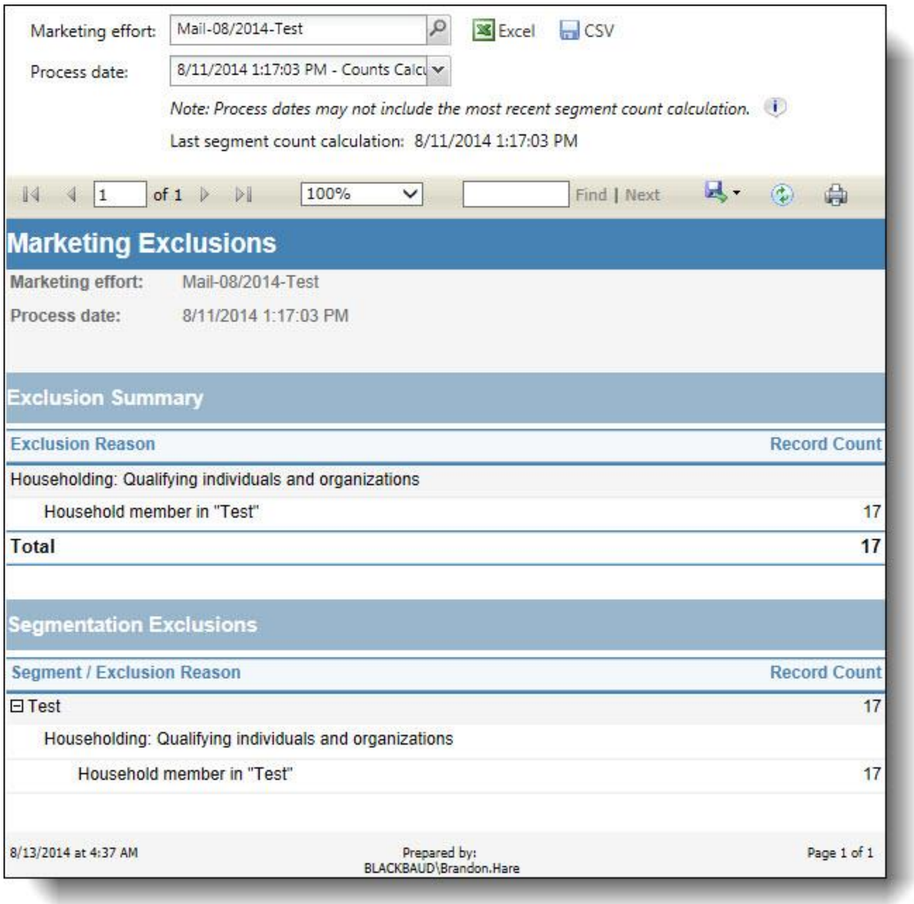
The Marketing exclusions report displays the total number of records excluded from a marketing effort and the reasons for their exclusion, such as the contact rules or exclusion selections. If the effort includes segment exclusions, the report also includes those record counts. Exclusions are updated when you run the Calculate segment counts process for an effort.

When you run the Marketing exclusions report, you can output the results to a *Microsoft* Excel pivot table or CSV file. The pivot table format supports the volume of the data returned in the report and allows you to manipulate the data to identify errors in your exclusion settings. You can add or remove filter fields to increase or decrease the level of detail included in the report. You can also drill down to view the individual constituents excluded from the report.

To run the report, click **Marketing exclusions** under **Reports**. The Marketing Exclusions page appears. In the **Marketing effort** field, select the marketing effort and in the **Process date** field, select the instance of the process to base your report on. In most cases, you probably want the most recent instance. Then, click **View Report**.

***Note:*** If you opted not to run a marketing exclusions report for a segment count calculation or mailing activation process, a report will not be available for that process date.

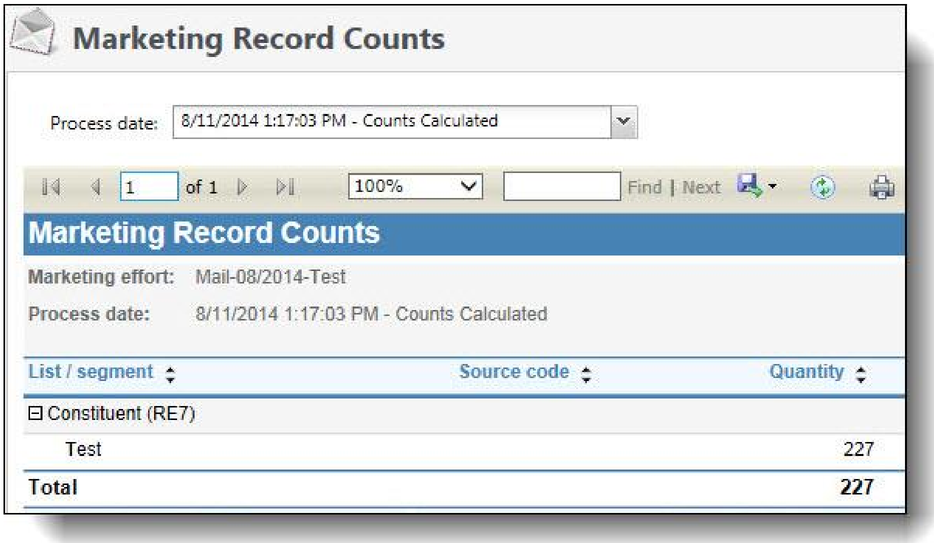
Click **Excel** or **CSV** to download the report output. The graphic below demonstrates how the report data appears in a pivot table.




# Marketing Record Counts Report

The Marketing record counts report shows the to-be-mailed count and source code for each segment, and the total number of records that will be mailed for a marketing effort. If the effort includes a segment exclusion, the report also includes the number of records excluded.

To run the report, click **Marketing record counts** under **Reports** on a marketing effort record. The report appears.

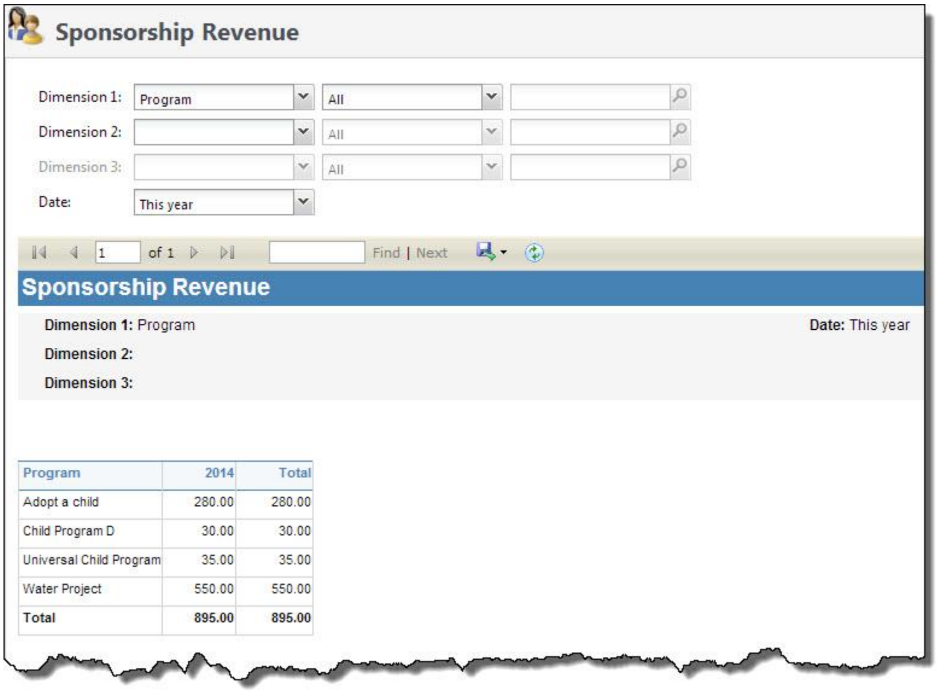



Record counts are updated during the Calculate segment counts process. In the **Process date** field, select the instance of the process to base your report on. In most cases, you probably want the most recent instance.

# Marketing Revenue Report

The Marketing revenue report displays the revenue that a marketing effort generates for your organization. You can use the report to display revenue from a single marketing effort or multiple efforts associated with a single appeal or marketing plan.

To run the report, click **Marketing revenue** under **Reports** on a marketing effort record. The report appears.



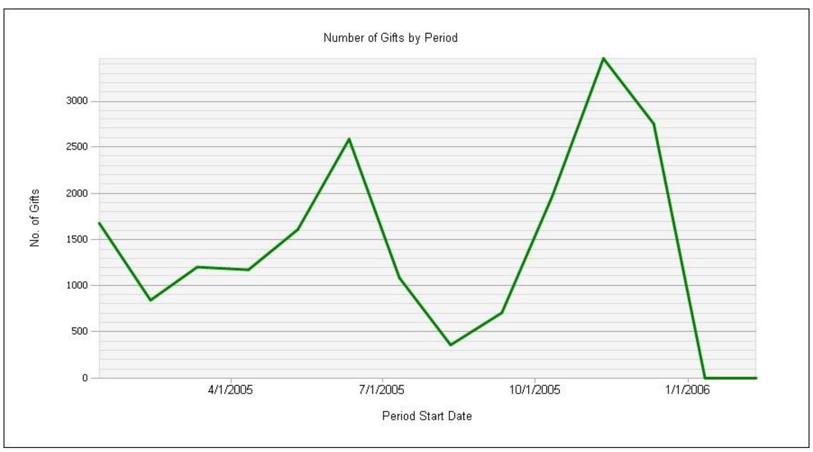

Under **Period totals**, the report displays gifts and revenue for the date range you select. Under **Totals to date**, it displays gifts and revenue up to and including the date range. This allows you to compare totals for the date range to the gifts and revenue before the start date.

The Marketing revenue report display the following parameters and calculations.

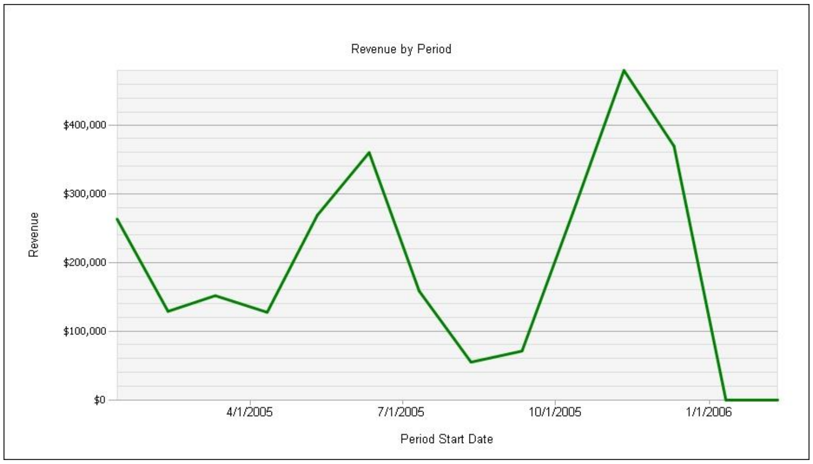
| Report item | Calculation |
|---|---|
| **Start date** | The first date to include data in the report. For marketing plans, this is the start date of the marketing plan. For appeals and marketing efforts, it is the mail date. If no mail date is defined for an appeal or marketing effort, the report uses the activation date. |
| **Total budget** | The amount budgeted for all marketing efforts in the report. |
| **Projected revenue** | The revenue expected from all marketing efforts in the report. |
| **Quantity mailed** | The quantity of mail for all marketing efforts in the report. |
| **Final cost** | The cost of all marketing efforts in the report. |
| **Actual revenue** | The revenue received so far for marketing efforts in the report. |
| **Date period** | The date range for the revenue information in the report. |

| Report item | Calculation |
|---|---|
| **Gifts** | Under **Period totals**, this column displays the number of gifts during the date range. Under **Totals to date**, it displays all gifts up to and including the date range. |
| **% of total gifts** | The number of gifts during the date range divided by the number of gifts by the report's end date. |
| **Revenue** | Under **Period totals**, this column displays the revenue during the date range. Under **Totals to date**, it displays the revenue up to and including the date range. |
| **% of total revenue** | The gift amount during the date range divided by the gift amount by the report's end date. |
| **Avg gift** | The gift amount during the date range divided by the number of gifts during the date range. |
| **Response rate** | The number of responses to the marketing efforts divided by the number of items sent. |

In addition to a grid with the results sorted by column, the report includes the **Number of Gifts by Period** and **Revenue by Period** charts. The **Number of Gifts by Period** chart displays the number of gifts received for the marketing efforts during the date range.



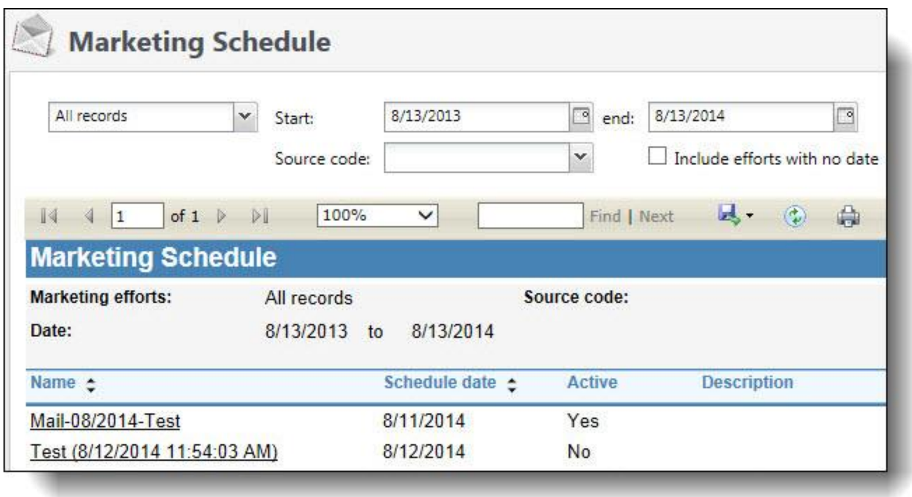

The **Revenue by Period** chart displays the total amount of revenue the marketing efforts generated during the date range.




# Marketing Schedule Report

The Marketing schedule report provides an overview of marketing efforts over a given time period. The report can include both active and unactivated marketing efforts, and it uses the schedule date to determine which efforts to include.

To run the report, click **Marketing schedule** under **Reports** on the Marketing Efforts page.

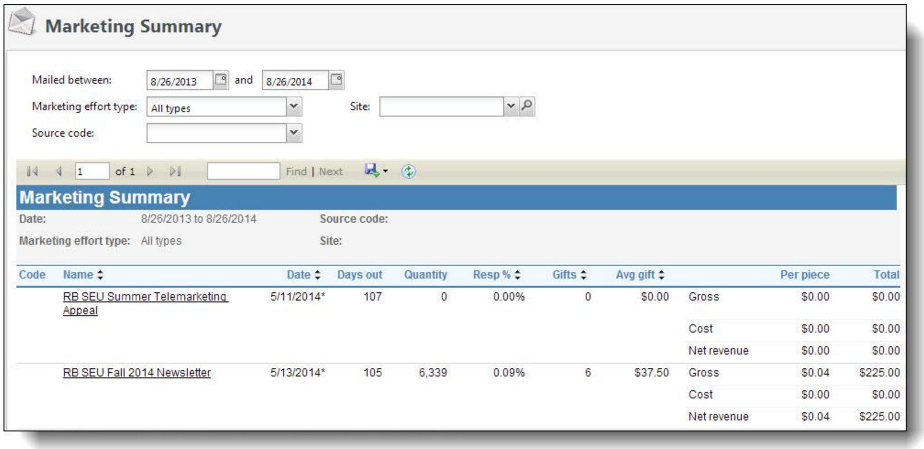



On the report, you click **Include** to select whether to include all marketing efforts or a selection of efforts. You can also filter the report based on date range, source code, and whether the marketing efforts have a schedule or active date.

# Marketing Summary Report

The Marketing summary report allows you to view detailed information about all your marketing efforts in a single report.

To run the report, click **Marketing summary** under **Reports** on the Marketing Efforts page.




You can filter the report based on date range, source code, and site. If you did not enter the mail date for marketing efforts in the report, the activate date appears instead. The date range defaults to the past year, and source code defaults to blank. To open a marketing effort record, click its name in the report.

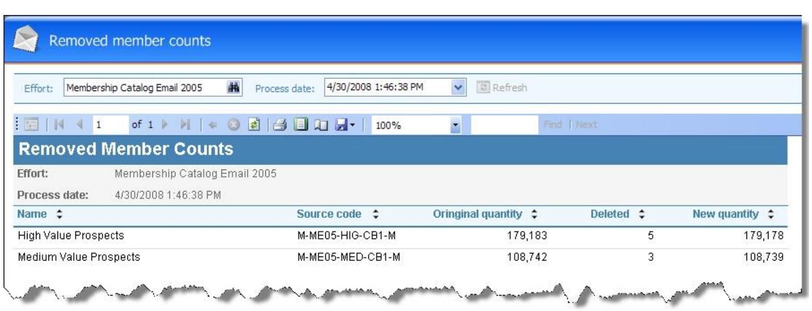
# Membership Renewal Efforts Report

The Membership Renewal Efforts report provides details about the response rate to a membership renewal marketing effort. The report includes renewal, upgrade, and downgrade statistics for the effort as a whole and for segments. To run the report, on the Membership Renewal Efforts page, click **Membership renewal efforts** under **Reports**, search for and select the effort to analyze, and click **View report**.

# Removed Member Counts Report

The Removed member counts report lists information about records removed from a marketing effort during the Remove Members process. The report includes the number of records originally in the marketing effort segment, the number of records removed, and the number of records in the updated effort. The number of records removed equals all the valid finder numbers in the UMC file from the vendor.

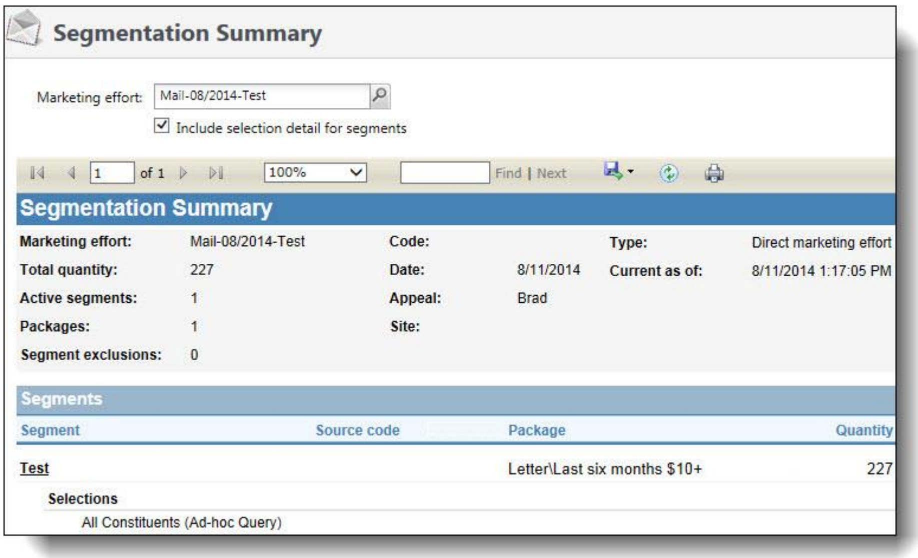
To run the report, click **Removed member counts** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.



# Segmentation Summary Report

The Segmentation summary report provides summary information about segments included in a marketing effort and about the selections within the segments. You can run this report for both active and unactivated marketing efforts.

To run the report, click **Segmentation summary** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.

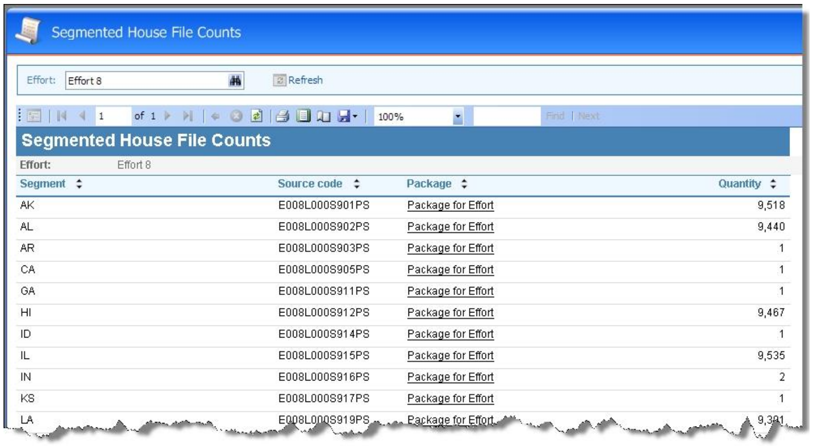



You can also select whether to display summary information about the selections within the segments. When you click a segment name, the segment record appears.

# Segmented House File Counts Report

The Segmented house file counts report provides the record counts, source codes, and packages for each segment in an imported house file for a marketing effort.

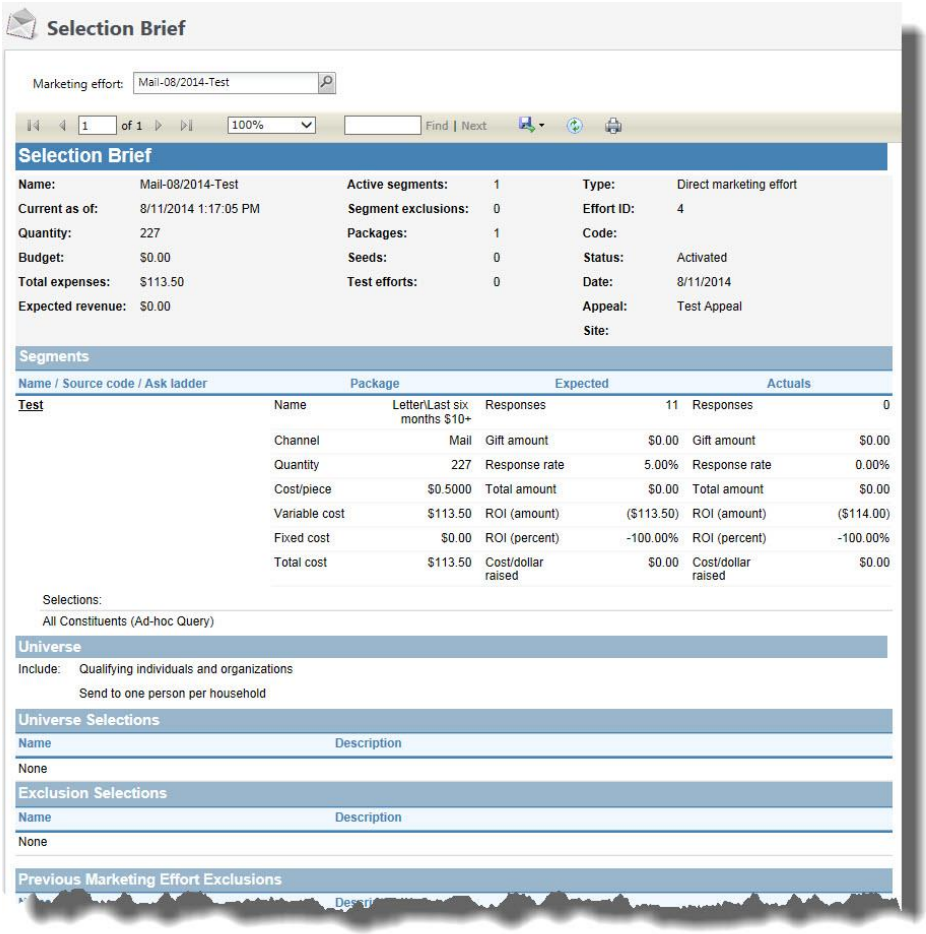
To run the report, click **Segmented house file counts** under **Reports** on the Segmented House Files page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.




# Selection Brief Report

The Selection brief report shows “who” and “what” for a selected planned marketing effort. Using information from a marketing plan, it specifies which segments need to be created (who) and which packages people in those segments should receive (what).

To run the report, click **Selection brief** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.

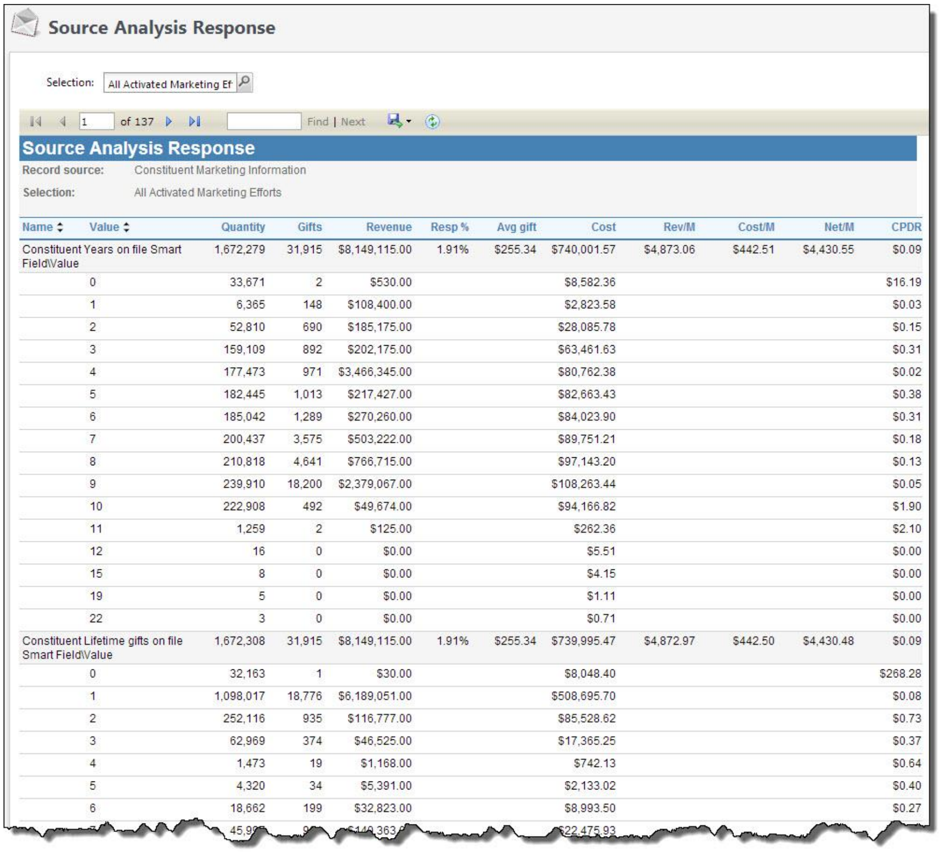



If you did not enter a mail date for the marketing efforts, the activate date appears instead. When you click a segment name, the segment record appears.

# Source Analysis Response Report

The Source analysis response report provides detailed information about how source analysis rules perform across marketing efforts for a record source. When you run the Source analysis response report, you choose a selection to view data for.

To run the report, click **Source analysis response** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.


Source Analysis Response

Selection: All Activated Marketing Ef

1 of 137 Find | Next

**Source Analysis Response**

Record source: Constituent Marketing Information

Selection: All Activated Marketing Efforts

| Name | Value | Quantity | Gifts | Revenue | Resp % | Avg gift | Cost | Rev/M | Cost/M | Net/M | CPDR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Constituent Years on file Smart Field\Value | | 1,672,279 | 31,915 | $8,149,115.00 | 1.91% | $255.34 | $740,001.57 | $4,873.06 | $442.51 | $4,430.55 | $0.09 |
| | 0 | 33,671 | 2 | $530.00 | | | $8,582.36 | | | | $16.19 |
| | 1 | 6,365 | 148 | $108,400.00 | | | $2,823.58 | | | | $0.03 |
| | 2 | 52,810 | 690 | $185,175.00 | | | $28,085.78 | | | | $0.15 |
| | 3 | 159,109 | 892 | $202,175.00 | | | $63,461.63 | | | | $0.31 |
| | 4 | 177,473 | 971 | $3,466,345.00 | | | $80,762.38 | | | | $0.02 |
| | 5 | 182,445 | 1,013 | $217,427.00 | | | $82,663.43 | | | | $0.38 |
| | 6 | 185,042 | 1,289 | $270,260.00 | | | $84,023.90 | | | | $0.31 |
| | 7 | 200,437 | 3,575 | $503,222.00 | | | $89,751.21 | | | | $0.18 |
| | 8 | 210,818 | 4,641 | $766,715.00 | | | $97,143.20 | | | | $0.13 |
| | 9 | 239,910 | 18,200 | $2,379,067.00 | | | $108,263.44 | | | | $0.05 |
| | 10 | 222,908 | 492 | $49,674.00 | | | $94,166.82 | | | | $1.90 |
| | 11 | 1,259 | 2 | $125.00 | | | $262.36 | | | | $2.10 |
| | 12 | 16 | 0 | $0.00 | | | $5.51 | | | | $0.00 |
| | 15 | 8 | 0 | $0.00 | | | $4.15 | | | | $0.00 |
| | 19 | 5 | 0 | $0.00 | | | $1.11 | | | | $0.00 |
| | 22 | 3 | 0 | $0.00 | | | $0.71 | | | | $0.00 |
| Constituent Lifetime gifts on file Smart Field\Value | | 1,672,308 | 31,915 | $8,149,115.00 | 1.91% | $255.34 | $739,995.47 | $4,872.97 | $442.50 | $4,430.48 | $0.09 |
| | 0 | 32,163 | 1 | $30.00 | | | $8,048.40 | | | | $268.28 |
| | 1 | 1,098,017 | 18,776 | $6,189,051.00 | | | $508,695.70 | | | | $0.08 |
| | 2 | 252,116 | 935 | $116,777.00 | | | $85,528.62 | | | | $0.73 |
| | 3 | 62,969 | 374 | $46,525.00 | | | $17,365.25 | | | | $0.37 |
| | 4 | 1,473 | 19 | $1,168.00 | | | $742.13 | | | | $0.64 |
| | 5 | 4,320 | 34 | $5,391.00 | | | $2,133.02 | | | | $0.40 |
| | 6 | 18,662 | 199 | $32,823.00 | | | $8,993.50 | | | | $0.27 |
| | [illegible] | [illegible] | [illegible] | [illegible] | | | $22,475.93 | | | | |

The Source analysis response report displays the following parameters and calculations:

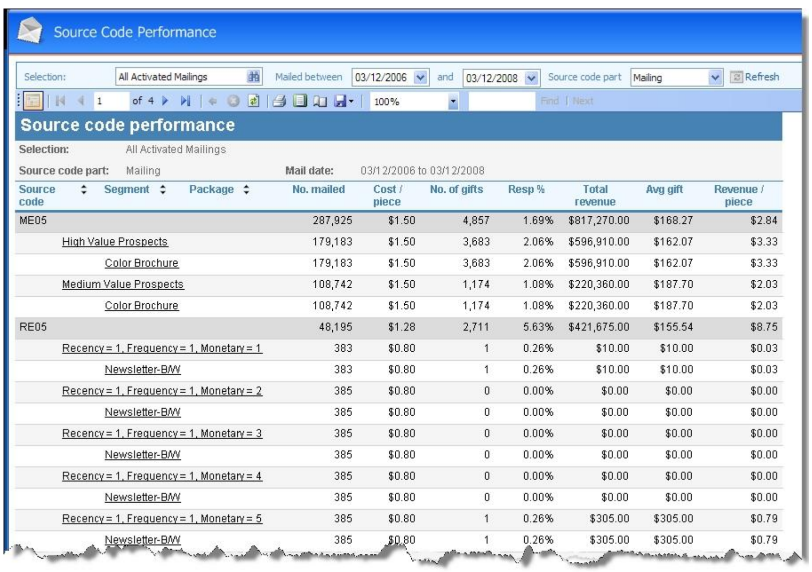
| Report item | Calculation |
|---|---|
| **Record source** | The name of the record source for the marketing effort. The report includes source analysis rule information for the record source. |
| **Selection** | The segment selection in the report. |
| **Name** | The name of the source analysis rule in the report. |
| **Value** | The value of the source analysis rule in the report. |
| **Quantity** | The number of pieces of mail sent to constituents in the source analysis rule for the record source. |
| **Gifts** | The number of gifts received from constituents in the source analysis rule for the record source. |
| **Revenue** | The revenue received from constituents who meet the source analysis rule criteria for the record type. |

| Report item | Calculation |
|---|---|
| **Resp %** | The response rate of constituents in the source analysis rule for the record source. |
| **Avg gift** | The average amount of the gifts received from constituents in the source analysis rule for the record source. |
| **Cost** | The costs incurred by the marketing efforts in the report. |
| **Rev/M** | The revenue that the marketing efforts generated divided by the quantity mailed, multiplied by 1000. |
| **Cost/M** | The cost the marketing efforts divided by the quantity mailed, multiplied by 1000. |
| **Net/M** | The **Cost/M** value subtracted from the **Rev/M** value. |
| **CPDR** | The cost per dollar raised for constituents in the source analysis rule for the record source. |

# Source Code Performance Report

The Source code performance report provides detailed information about how source codes perform across marketing efforts. The report includes only marketing efforts that are activated and that use a source code including the selected part. When you click on a segment name, that segment record appears.

To run the report, click **Source code performance** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.


Source Code Performance

Selection: All Activated Mailings Mailed between 03/12/2006 and 03/12/2008 Source code part Mailing Refresh

1 of 4 100% Find | Next

Source code performance

Selection: All Activated Mailings

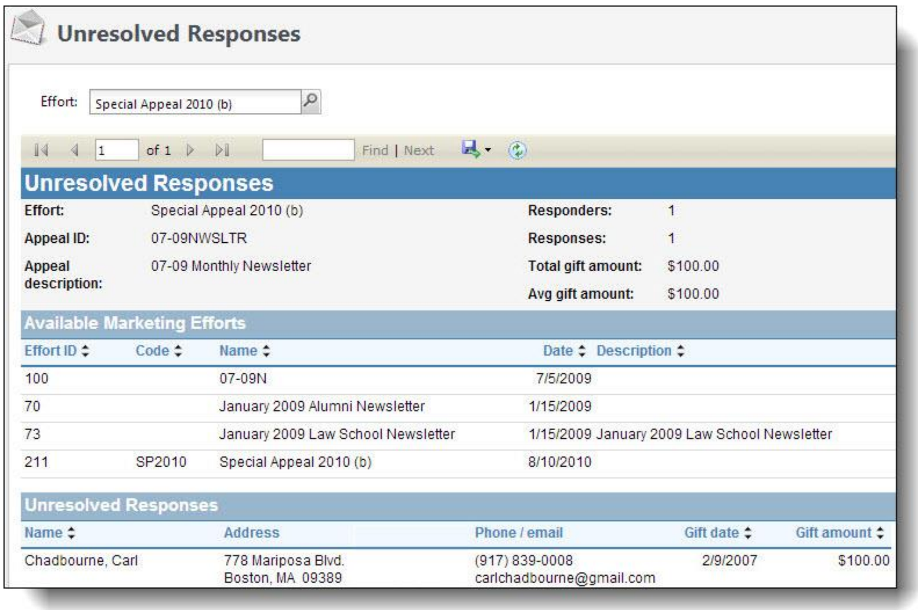
Source code part: Mailing Mail date: 03/12/2006 to 03/12/2008

| Source code | Segment | Package | No. mailed | Cost / piece | No. of gifts | Resp % | Total revenue | Avg gift | Revenue / piece |
|---|---|---|---|---|---|---|---|---|---|
| ME05 | | | 287,925 | $1.50 | 4,857 | 1.69% | $817,270.00 | $168.27 | $2.84 |
| | High Value Prospects | | 179,183 | $1.50 | 3,683 | 2.06% | $596,910.00 | $162.07 | $3.33 |
| | | Color Brochure | 179,183 | $1.50 | 3,683 | 2.06% | $596,910.00 | $162.07 | $3.33 |
| | Medium Value Prospects | | 108,742 | $1.50 | 1,174 | 1.08% | $220,360.00 | $187.70 | $2.03 |
| | | Color Brochure | 108,742 | $1.50 | 1,174 | 1.08% | $220,360.00 | $187.70 | $2.03 |
| RE05 | | | 48,195 | $1.28 | 2,711 | 5.63% | $421,675.00 | $155.54 | $8.75 |
| | Recency = 1, Frequency = 1, Monetary = 1 | | 383 | $0.80 | 1 | 0.26% | $10.00 | $10.00 | $0.03 |
| | | Newsletter-B/W | 383 | $0.80 | 1 | 0.26% | $10.00 | $10.00 | $0.03 |
| | Recency = 1, Frequency = 1, Monetary = 2 | | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | | Newsletter-B/W | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | Recency = 1, Frequency = 1, Monetary = 3 | | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | | Newsletter-B/W | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | Recency = 1, Frequency = 1, Monetary = 4 | | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | | Newsletter-B/W | 385 | $0.80 | 0 | 0.00% | $0.00 | $0.00 | $0.00 |
| | Recency = 1, Frequency = 1, Monetary = 5 | | 385 | $0.80 | 1 | 0.26% | $305.00 | $305.00 | $0.79 |
| | | Newsletter-B/W | 385 | $0.80 | 1 | 0.26% | $305.00 | $305.00 | $0.79 |

# Unresolved Responses Report

The Unresolved responses report provides detailed information about responses from donors who did not receive an offer but gave gifts to an appeal anyway. As long as the they are unresolved, the gifts cannot be credited to a marketing effort. The donors were not part of a marketing effort but gave gifts that somehow were associated with the appeal but have no marketing effort IDs. The gifts have only the appeal.

To run the report, click **Unresolved responses** under **Reports** on the Marketing Efforts page. A search screen appears. Search for and select a marketing effort, and click **Select**. The report appears.




In the **Effort** field on the report, you can search for and select other marketing efforts to analyze in the report. If you did not enter a mail date for the efforts the report, the activate date appears instead.

# List Reports

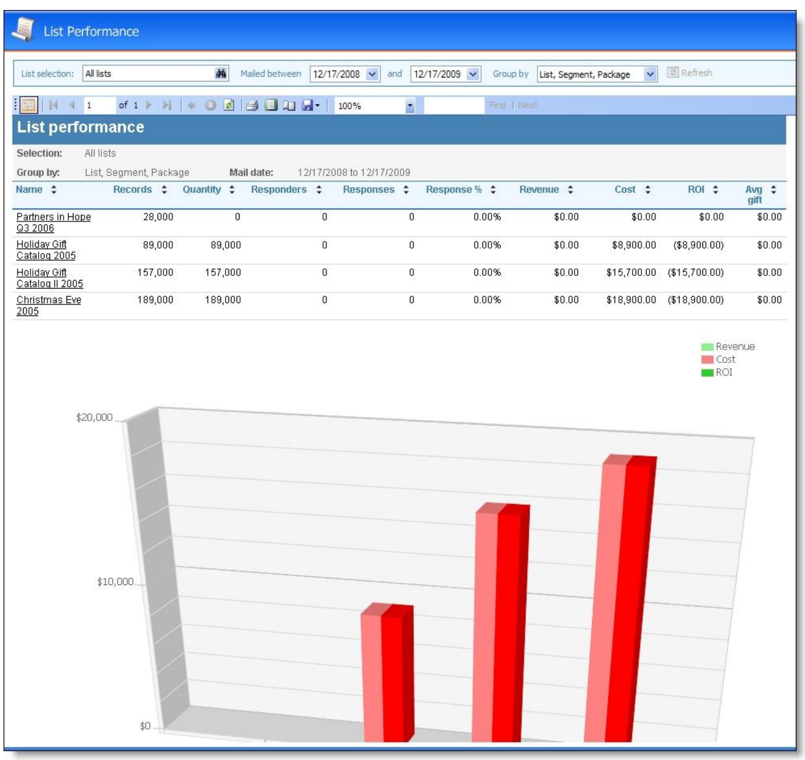


List reports allow you to track the performance of acquisition lists throughout your system. List reports include the List performance report, the List profile report, and the List summary report.

## List Performance Report

The List performance report shows detailed information about your lists, such as response percentage, total revenue, return on investment (ROI).

To run the report, click **List performance** under **Reports** on the Acquisitions lists page.

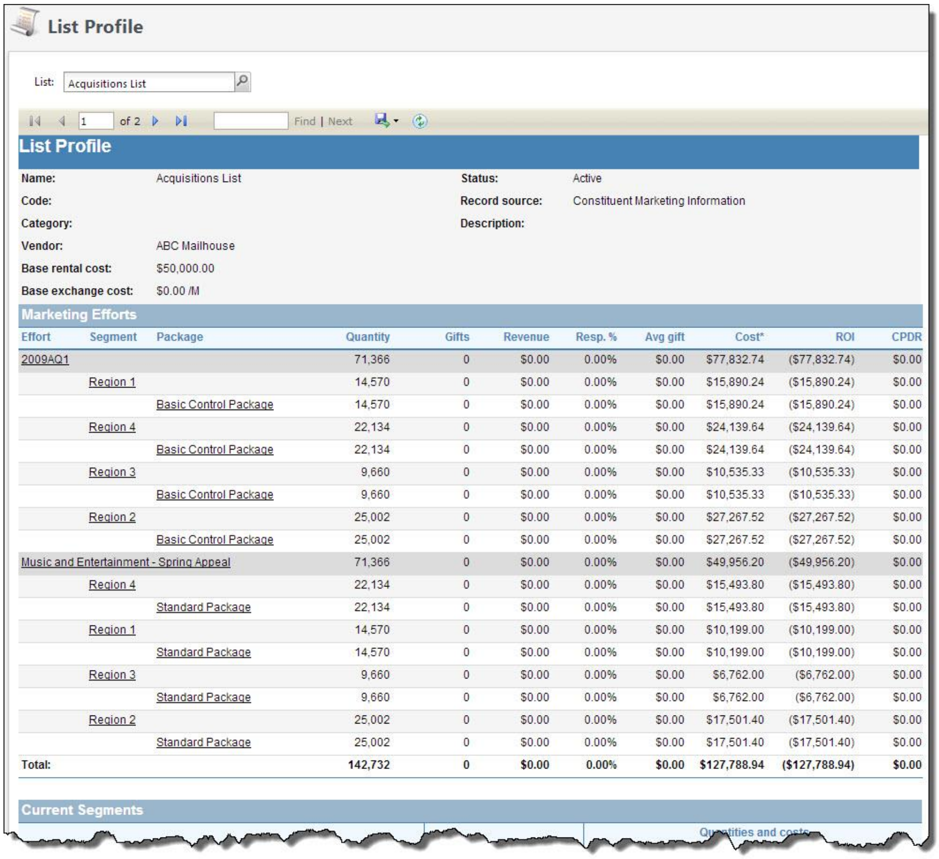



You can filter the report based on mailing date range. The date range defaults to the past year. When you click a list, segment, or package name, the record appears.

# List Profile Report

The List profile report shows detailed information about a list.

To run the report, click **List profile** under **Reports** on a list record.


List Profile

List: Acquisitions List

1 of 2 Find | Next

List Profile

| | | | |
|---|---|---|---|
| **Name:** | Acquisitions List | **Status:** | Active |
| **Code:** | | **Record source:** | Constituent Marketing Information |
| **Category:** | | **Description:** | |
| **Vendor:** | ABC Mailhouse | | |
| **Base rental cost:** | $50,000.00 | | |
| **Base exchange cost:** | $0.00 /M | | |

Marketing Efforts

| Effort | Segment | Package | Quantity | Gifts | Revenue | Resp. % | Avg gift | Cost* | ROI | CPDR |
|---|---|---|---|---|---|---|---|---|---|---|
| 2009AQ1 | | | 71,366 | 0 | $0.00 | 0.00% | $0.00 | $77,832.74 | ($77,832.74) | $0.00 |
| | Region 1 | | 14,570 | 0 | $0.00 | 0.00% | $0.00 | $15,890.24 | ($15,890.24) | $0.00 |
| | | Basic Control Package | 14,570 | 0 | $0.00 | 0.00% | $0.00 | $15,890.24 | ($15,890.24) | $0.00 |
| | Region 4 | | 22,134 | 0 | $0.00 | 0.00% | $0.00 | $24,139.64 | ($24,139.64) | $0.00 |
| | | Basic Control Package | 22,134 | 0 | $0.00 | 0.00% | $0.00 | $24,139.64 | ($24,139.64) | $0.00 |
| | Region 3 | | 9,660 | 0 | $0.00 | 0.00% | $0.00 | $10,535.33 | ($10,535.33) | $0.00 |
| | | Basic Control Package | 9,660 | 0 | $0.00 | 0.00% | $0.00 | $10,535.33 | ($10,535.33) | $0.00 |
| | Region 2 | | 25,002 | 0 | $0.00 | 0.00% | $0.00 | $27,267.52 | ($27,267.52) | $0.00 |
| | | Basic Control Package | 25,002 | 0 | $0.00 | 0.00% | $0.00 | $27,267.52 | ($27,267.52) | $0.00 |
| Music and Entertainment - Spring Appeal | | | 71,366 | 0 | $0.00 | 0.00% | $0.00 | $49,956.20 | ($49,956.20) | $0.00 |
| | Region 4 | | 22,134 | 0 | $0.00 | 0.00% | $0.00 | $15,493.80 | ($15,493.80) | $0.00 |
| | | Standard Package | 22,134 | 0 | $0.00 | 0.00% | $0.00 | $15,493.80 | ($15,493.80) | $0.00 |
| | Region 1 | | 14,570 | 0 | $0.00 | 0.00% | $0.00 | $10,199.00 | ($10,199.00) | $0.00 |
| | | Standard Package | 14,570 | 0 | $0.00 | 0.00% | $0.00 | $10,199.00 | ($10,199.00) | $0.00 |
| | Region 3 | | 9,660 | 0 | $0.00 | 0.00% | $0.00 | $6,762.00 | ($6,762.00) | $0.00 |
| | | Standard Package | 9,660 | 0 | $0.00 | 0.00% | $0.00 | $6,762.00 | ($6,762.00) | $0.00 |
| | Region 2 | | 25,002 | 0 | $0.00 | 0.00% | $0.00 | $17,501.40 | ($17,501.40) | $0.00 |
| | | Standard Package | 25,002 | 0 | $0.00 | 0.00% | $0.00 | $17,501.40 | ($17,501.40) | $0.00 |
| **Total:** | | | **142,732** | **0** | **$0.00** | **0.00%** | **$0.00** | **$127,788.94** | **($127,788.94)** | **$0.00** |

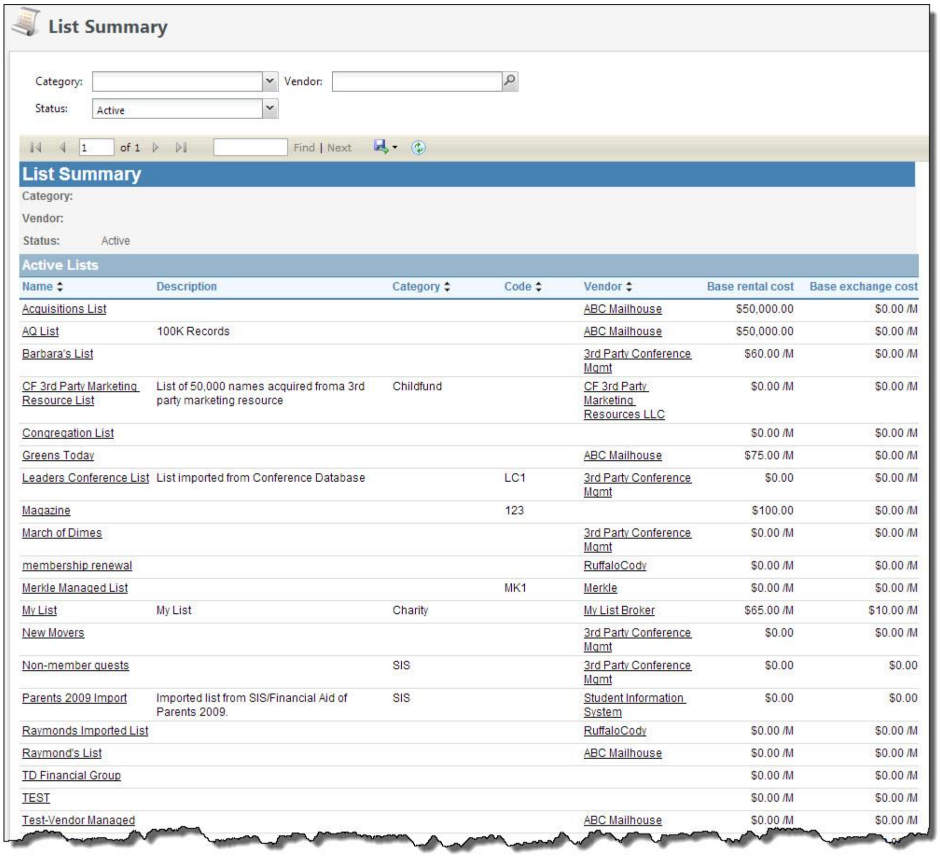
Current Segments

In the **List** field, you can select other lists and view their profiles. When you click a marketing effort, segment, or package name, the record appears.

# List Summary Report

The List summary report shows detailed information about each of your lists.

To run the report, click **List summary** under **Reports** on the Acquisitions lists page.



List Summary

Category: Vendor:
Status: Active

## List Summary

**Category:**
**Vendor:**
**Status:** Active

**Active Lists**

| Name | Description | Category | Code | Vendor | Base rental cost | Base exchange cost |
|---|---|---|---|---|---|---|
| Acquisitions List | | | | ABC Mailhouse | $50,000.00 | $0.00 /M |
| AQ List | 100K Records | | | ABC Mailhouse | $50,000.00 | $0.00 /M |
| Barbara's List | | | | 3rd Party Conference Mgmt | $60.00 /M | $0.00 /M |
| CF 3rd Party Marketing Resource List | List of 50,000 names acquired froma 3rd party marketing resource | Childfund | | CF 3rd Party Marketing Resources LLC | $0.00 /M | $0.00 /M |
| Congregation List | | | | | $0.00 /M | $0.00 /M |
| Greens Today | | | | ABC Mailhouse | $75.00 /M | $0.00 /M |
| Leaders Conference List | List imported from Conference Database | | LC1 | 3rd Party Conference Mgmt | $0.00 | $0.00 /M |
| Magazine | | | 123 | | $100.00 | $0.00 /M |
| March of Dimes | | | | 3rd Party Conference Mgmt | $0.00 /M | $0.00 /M |
| membership renewal | | | | RuffaloCody | $0.00 /M | $0.00 /M |
| Merkle Managed List | | | MK1 | Merkle | $0.00 /M | $0.00 /M |
| My List | My List | Charity | | My List Broker | $65.00 /M | $10.00 /M |
| New Movers | | | | 3rd Party Conference Mgmt | $0.00 | $0.00 /M |
| Non-member guests | | SIS | | 3rd Party Conference Mgmt | $0.00 | $0.00 |
| Parents 2009 Import | Imported list from SIS/Financial Aid of Parents 2009. | SIS | | Student Information System | $0.00 | $0.00 |
| Raymonds Imported List | | | | RuffaloCody | $0.00 /M | $0.00 /M |
| Raymond's List | | | | ABC Mailhouse | $0.00 /M | $0.00 /M |
| TD Financial Group | | | | | $0.00 /M | $0.00 /M |
| TEST | | | | | $0.00 /M | $0.00 /M |
| Test-Vendor Managed | | | | ABC Mailhouse | $0.00 /M | $0.00 /M |

You can filter the report based on the category and vendor. When you click a list name, the record appears.

# Segment Reports

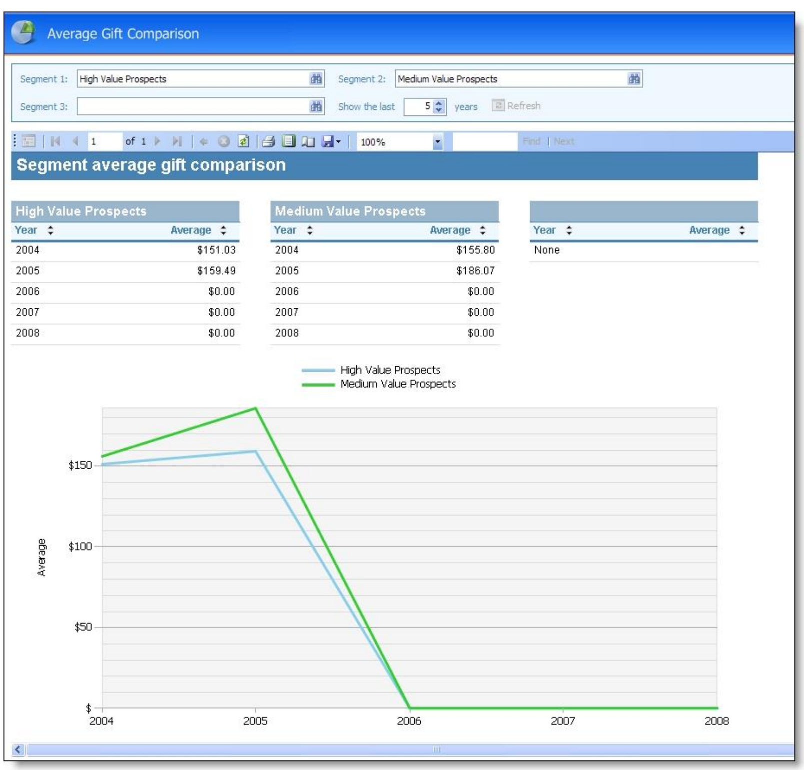


Segment reports allow you to track the performance of segments throughout your system.

## Average Gift Comparison Report

The Average gift comparison report allows you to compare and graphically illustrate average gift amounts for multiple segments.

To run the report, click **Average gift comparison** under **Reports** on the Segments page.

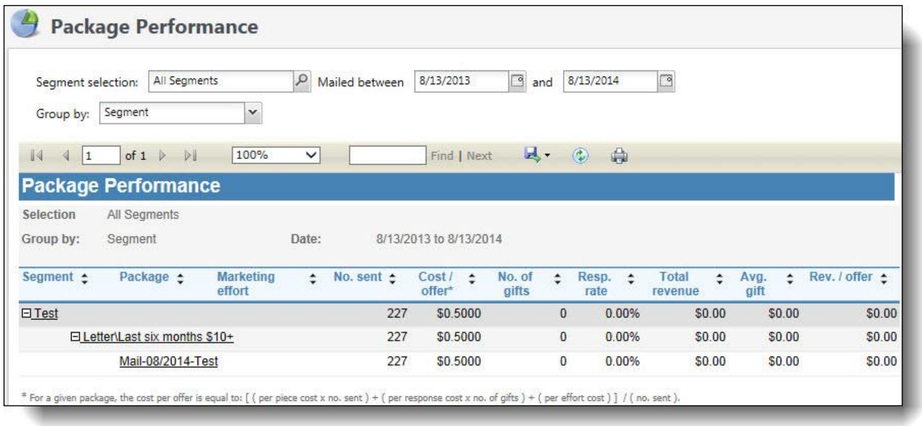


In the segment fields, you can select the segments to compare. In the **Show the last [ ] years** field, enter the time frame for the report.

# Package Performance Report

You can use the Package performance report to assess the effectiveness of packages. When you group by segment, the report displays how each package performed for the selected segment. When you group by package, the report displays how each selected segment performed for each package.

To run the report, click **Package performance** under **Reports** on the Segments page. A search screen appears. Search for and select a segment, and click **Select**. The report appears.



The Segment Package Performance report includes these items:

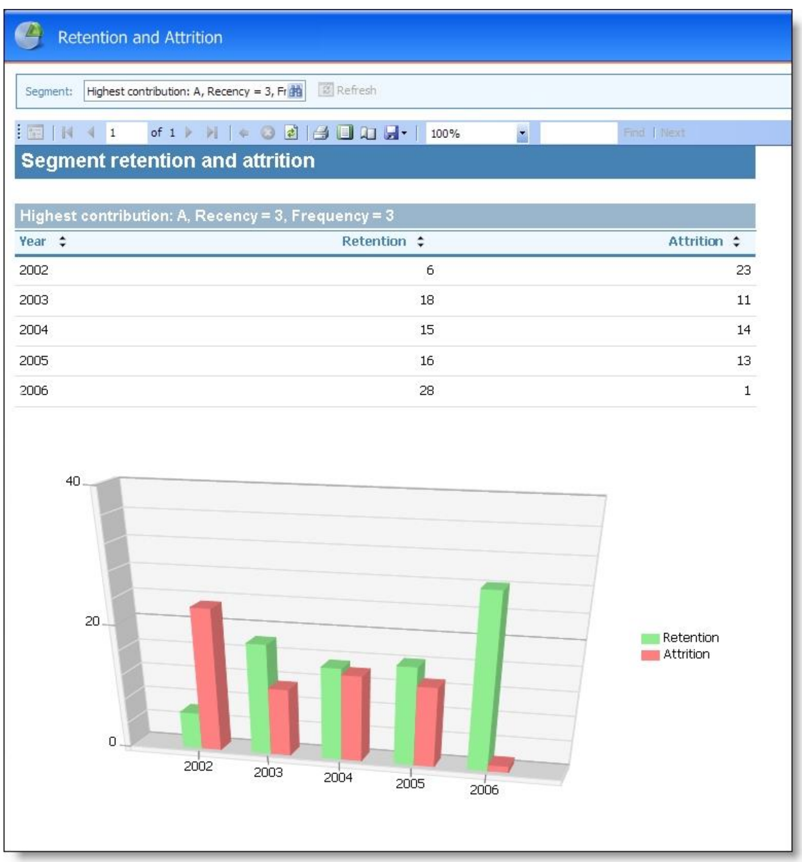
| Report item | Description |
|---|---|
| **Segment selection** | Enter the segment selections to analyze in the report. |
| **Mailed between** | Select the date range of mailed packages to include in the report. |
| **Group by** | Select whether to group the report by segment or package. |
| **Mail date** | The start and end dates for information you select in the **Mailed between** fields. |
| **Segment** | The segment name. When you click a name, the segment record appears. |
| **Package** | The package name. When you click a name, the package record appears. |
| **Marketing effort** | The marketing effort name. When you click a name, the marketing effort record appears. |
| **No. mailed** | The quantity mailed to each segment and package combination in each marketing effort. |
| **Cost/piece** | The cost per piece mailed to each segment and package combination. |

| Report item | Description |
|---|---|
| **No. of gifts** | The number of gifts received from each segment and package combination. |
| **Resp %** | The response rate for each segment and package combination. |
| **Total revenue** | The revenue received from each segment and package combination. |
| **Avg gift** | The average gift amount for each segment and package combination. |
| **Revenue/piece** | The revenue per piece mailed to each segment and package combination. |

# Retention and Attrition Report

The Retention and attrition report displays how many members of a segment gave a gift during the year (retention) and how many did not (attrition). Over time, you would want to see the attrition number decline and the retention number increase.

To run the report, click **Retention and attrition** under **Reports** on the Segments page. A search screen appears. Search for and select the segment to analyze.




In the **Segment** field, you can search for another segment to analyze.

# White Mail Segment Summary Report

The White mail segment summary report includes performance statistics for white mail segments including the number of responders and responses, the total amount given, and the average gift amount. The report also displays the segment's current status.

To run the report, click **White mail segment summary** under **Reports** on the White mail segments page.


In the filter fields, you enter a cutoff date for segments to include. If you select **Include inactive**, the report also includes any inactive segments for the specified period. In the **Source code** field, you can select a source code to filter by.

# Planner Reports

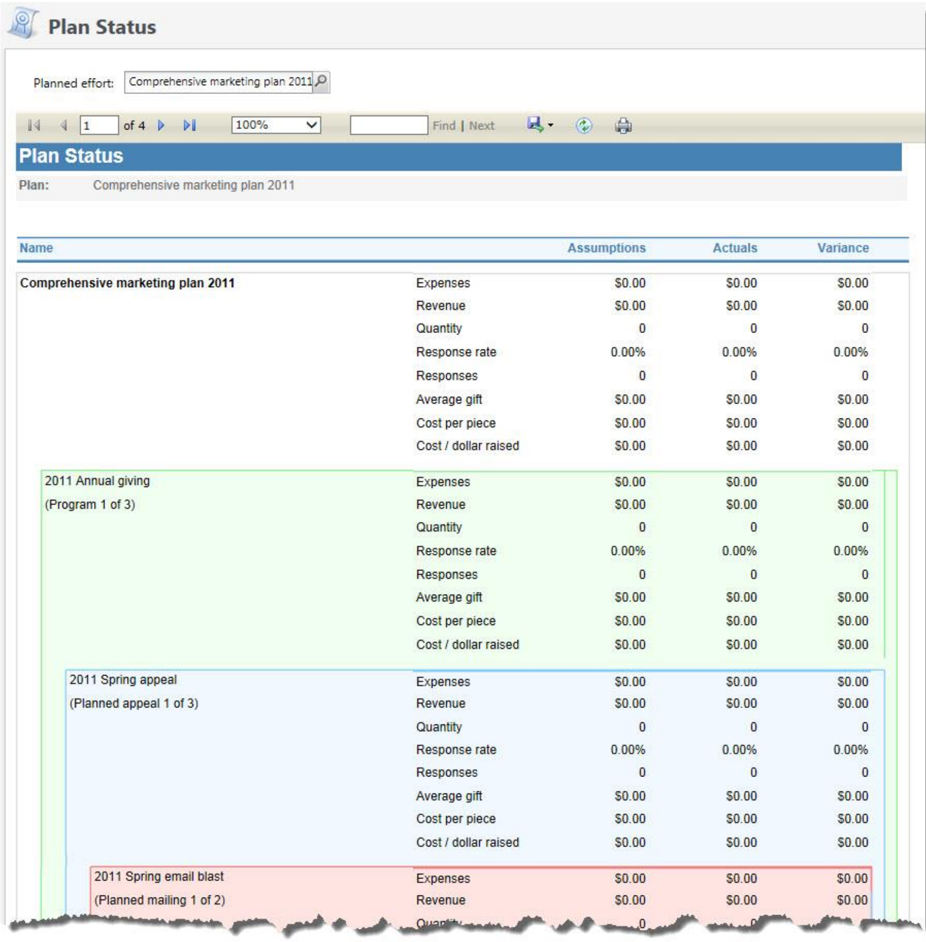


Planner reports allow you to track the performance of marketing plans throughout your system. Planner reports include the Plan income forecast report, Planner income outlook report, Planned marketing profile report, and Plan status report.

## Plan Status Report

The Plan status report allows you to compare your expectations for planned marketing efforts with the results.

To run the report, click **Plan status** under **Reports** on a marketing plan record.




| Name | | Assumptions | Actuals | Variance |
|---|---|---|---|---|
| Comprehensive marketing plan 2011 | Expenses | $0.00 | $0.00 | $0.00 |
| | Revenue | $0.00 | $0.00 | $0.00 |
| | Quantity | 0 | 0 | 0 |
| | Response rate | 0.00% | 0.00% | 0.00% |
| | Responses | 0 | 0 | 0 |
| | Average gift | $0.00 | $0.00 | $0.00 |
| | Cost per piece | $0.00 | $0.00 | $0.00 |
| | Cost / dollar raised | $0.00 | $0.00 | $0.00 |
| 2011 Annual giving (Program 1 of 3) | Expenses | $0.00 | $0.00 | $0.00 |
| | Revenue | $0.00 | $0.00 | $0.00 |
| | Quantity | 0 | 0 | 0 |
| | Response rate | 0.00% | 0.00% | 0.00% |
| | Responses | 0 | 0 | 0 |
| | Average gift | $0.00 | $0.00 | $0.00 |
| | Cost per piece | $0.00 | $0.00 | $0.00 |
| | Cost / dollar raised | $0.00 | $0.00 | $0.00 |
| 2011 Spring appeal (Planned appeal 1 of 3) | Expenses | $0.00 | $0.00 | $0.00 |
| | Revenue | $0.00 | $0.00 | $0.00 |
| | Quantity | 0 | 0 | 0 |
| | Response rate | 0.00% | 0.00% | 0.00% |
| | Responses | 0 | 0 | 0 |
| | Average gift | $0.00 | $0.00 | $0.00 |
| | Cost per piece | $0.00 | $0.00 | $0.00 |
| | Cost / dollar raised | $0.00 | $0.00 | $0.00 |
| 2011 Spring email blast (Planned mailing 1 of 2) | Expenses | $0.00 | $0.00 | $0.00 |
| | Revenue | $0.00 | $0.00 | $0.00 |

This report displays a hierarchical view of the current status of each item in a plan. After you create a marketing effort based on a planned effort within the plan, and activate that marketing effort, you can use this report to compare your assumptions in the planned marketing efforts with the results.

The report uses the following parameters and calculations:

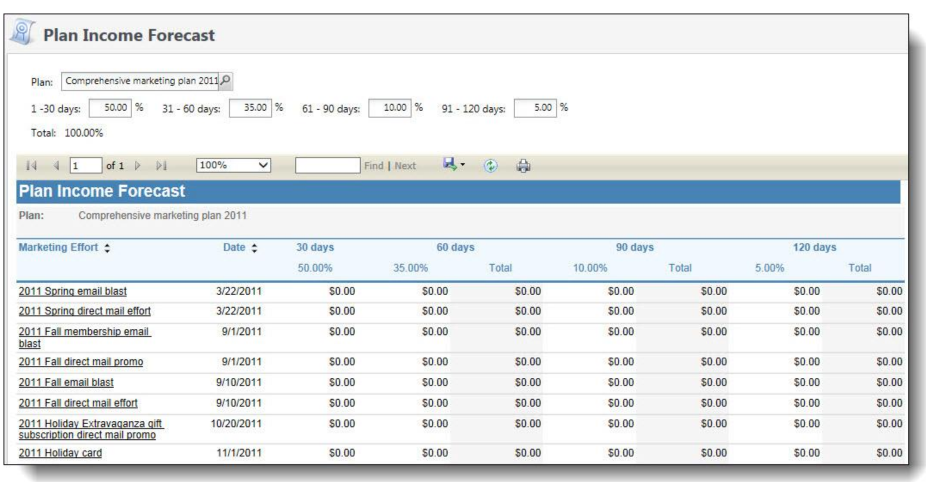
| Report column | Report row | Calculation |
|---|---|---|
| **Assumptions** | | The assumptions are calculated from those specified in the planner. Each plan "item" in the report uses its own separate data, and is not aggregated in any way from level to level. |
| | **Expenses** | Specified in the planner. |
| | Revenue | Specified in the planner. |
| | Responses | Specified in the planner. |
| | Response rate | Specified in the planner. |

| Report column | Report row | Calculation |
|---|---|---|
| | Average gift | Revenue / Responses. |
| | Cost per piece | Expenses / Quantity (specified in the planner). |
| | **Cost / dollar raised** | Expenses / Revenue. |
| Actuals | | Calculated from the activated mailings. The mailings are mapped to a planned mailing (the lowest level of the plan), and are then aggregated up through the hierarchy. So the plan level is an aggregation of all mailings within the plan. |
| | Expenses | Package expenses + Fixed cost. |
| | Revenue | Sum of all gifts given back to the mailing. |
| | Responses | Count of the number of responses to the mailing. |
| | Response rate | Responses / Quantity. |
| | Average gift | Revenue / responses. |
| | Cost per piece | Expenses / Quantity. |
| | Cost / dollar raised | Expenses / Revenue. |
| Variance | | Actuals - Assumptions. |

# Plan Income Forecast Report

The Plan income forecast report displays the expected income schedule by marketing effort for a plan.

To run the report, click **Plan income forecast** under **Reports** on a marketing plan.



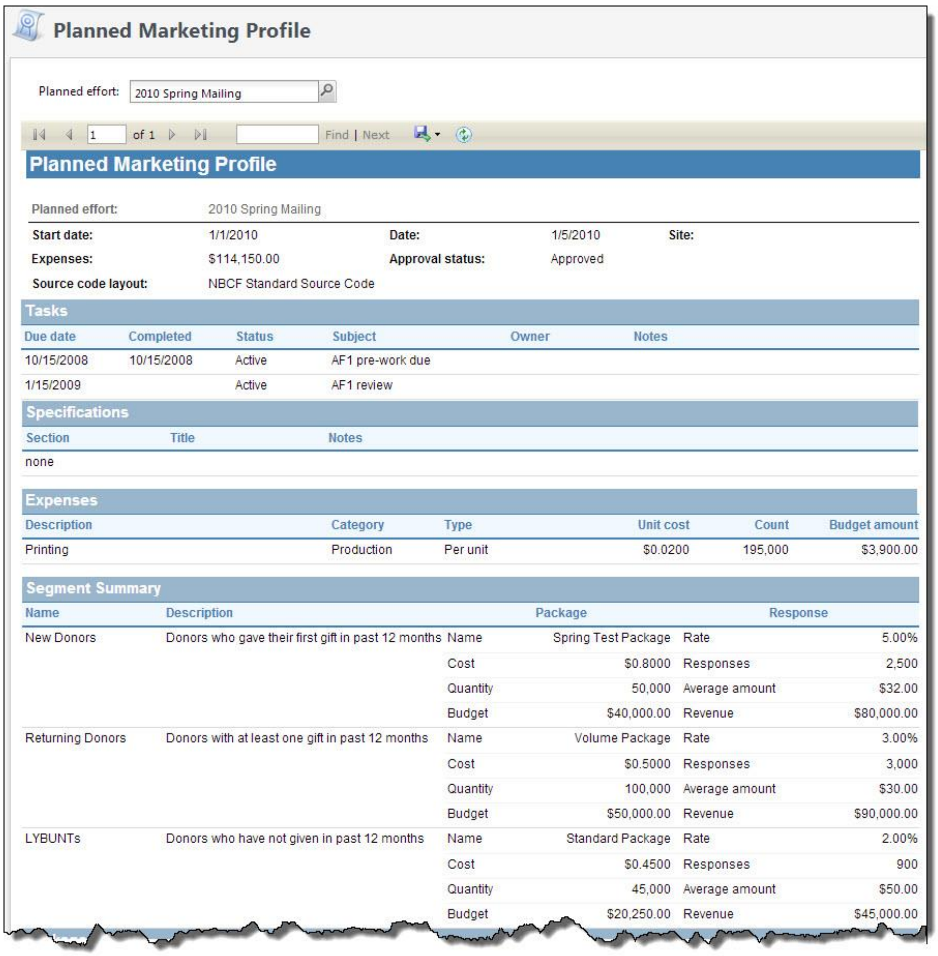
In the **Plan** field, you can search for other plans to analyze. You can adjust the income interval percentages as necessary in the day range fields. The percentages must add up to 100 percent.

To refresh the data and view the report after you make a selection, click **Refresh**

# Planned Marketing Effort Profile Report

The Planned marketing effort profile report displays a detailed profile of a planned marketing effort, including tasks, specifications, expenses, segment summaries, packages, and attachments.

To run the report, click **Planned marketing effort profile** under **Reports** on the record of a planned marketing effort within a marketing plan.



Planned Marketing Profile

Planned effort: 2010 Spring Mailing

1 of 1 Find | Next

**Planned Marketing Profile**

Planned effort: 2010 Spring Mailing

| | | | | |
|---|---|---|---|---|
| **Start date:** | 1/1/2010 | **Date:** | 1/5/2010 | **Site:** |
| **Expenses:** | $114,150.00 | **Approval status:** | Approved | |
| **Source code layout:** | NBCF Standard Source Code | | | |

**Tasks**

| Due date | Completed | Status | Subject | Owner | Notes |
|---|---|---|---|---|---|
| 10/15/2008 | 10/15/2008 | Active | AF1 pre-work due | | |
| 1/15/2009 | | Active | AF1 review | | |

**Specifications**

| Section | Title | Notes |
|---|---|---|
| none | | |

**Expenses**

| Description | Category | Type | Unit cost | Count | Budget amount |
|---|---|---|---|---|---|
| Printing | Production | Per unit | $0.0200 | 195,000 | $3,900.00 |

**Segment Summary**

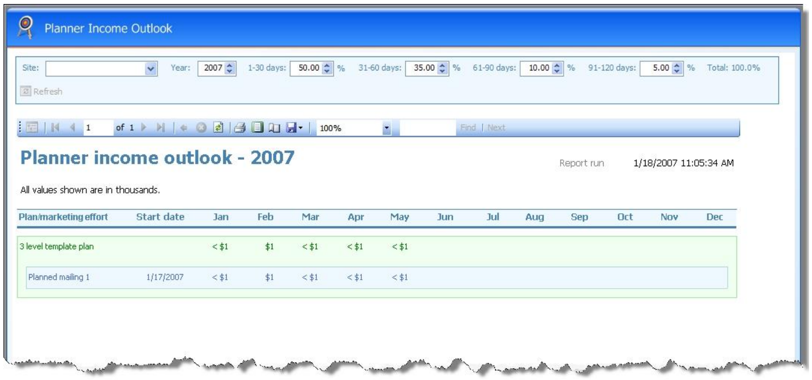
| Name | Description | Package | | Response | |
|---|---|---|---|---|---|
| New Donors | Donors who gave their first gift in past 12 months | Name | Spring Test Package | Rate | 5.00% |
| | | Cost | $0.8000 | Responses | 2,500 |
| | | Quantity | 50,000 | Average amount | $32.00 |
| | | Budget | $40,000.00 | Revenue | $80,000.00 |
| Returning Donors | Donors with at least one gift in past 12 months | Name | Volume Package | Rate | 3.00% |
| | | Cost | $0.5000 | Responses | 3,000 |
| | | Quantity | 100,000 | Average amount | $30.00 |
| | | Budget | $50,000.00 | Revenue | $90,000.00 |
| LYBUNTs | Donors who have not given in past 12 months | Name | Standard Package | Rate | 2.00% |
| | | Cost | $0.4500 | Responses | 900 |
| | | Quantity | 45,000 | Average amount | $50.00 |
| | | Budget | $20,250.00 | Revenue | $45,000.00 |

In the **Planned efforts** field, you can search for other planned marketing efforts to analyze.

# Planner Income Outlook Report

The Planner income outlook report shows the projected monthly revenue for each planned marketing effort during a specified year, grouped by plan. This report allows you to assess when you should receive money during the year.

To run the report, click **Planner income outlook** under **Reports** on the Planner page.




***Note:*** Only planned marketing reports with projected revenue appear in the report.

In the **Site** field, you can filter the filter the report by site. In the **Year** field, select the year to report on.

You can also adjust the revenue interval percentages as necessary in the day range fields. The percentages must add up 100 percent.

The default intervals for the Planner income outlook report are:

1-30 days: 50% (50% of the expected revenue for the marketing effort will come in the first 30 days)

31-60 days: 35%

61-90 days: 10%

91-120 days: 5%

Based on the default intervals, the report calculates revenue for each of the first 120 days after a marketing effort's drop date as follows:

**Revenue** = Expected Marketing Effort Revenue * Interval Percentage / 30

For example, on a marketing effort expected to generate $100,000, the expected revenue on the 40th day after the drop date is:

**Revenue** = $100,000 * .35 / 30

**Revenue** = $1,116.67

After each of the 120 days are calculated, they are aggregated based on the calendar month. So if the marketing effort dropped Jan. 15, the sum of the revenues for the first 17 days (Jan. 15 to 31) gives you the expected revenue for that marketing effort in January.

The monthly values for each marketing effort within a plan are aggregated together to display the monthly revenue expectations for the entire plan.

# Constituent Reports



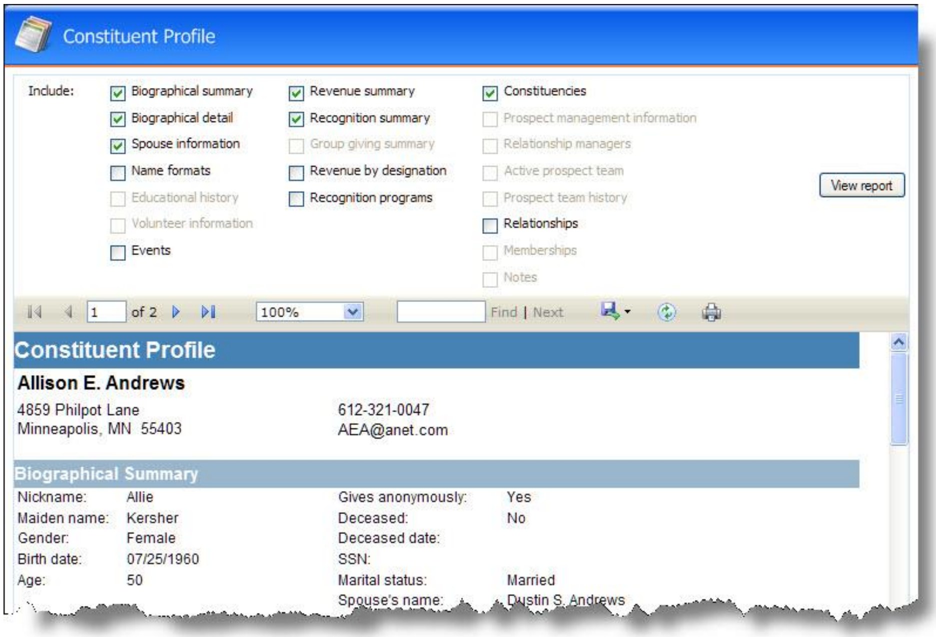
## Constituent Profile Report

In a constituent profile report, you can select to include an assortment of detailed constituent information. A constituent profile can be helpful, such as to present a constituent summary to your board members or solicitors. To access the report from a constituent's record, click **Constituent profile** under **Reports**.

***Note:*** To access the report from *Constituents*, click **Constituent profile report** under **Reports**. To access a constituent profile report from *Analysis*, click **Constituent reports** and then **Constituent profile**. The Constituent Search screen appears so you can search for the constituent to profile.

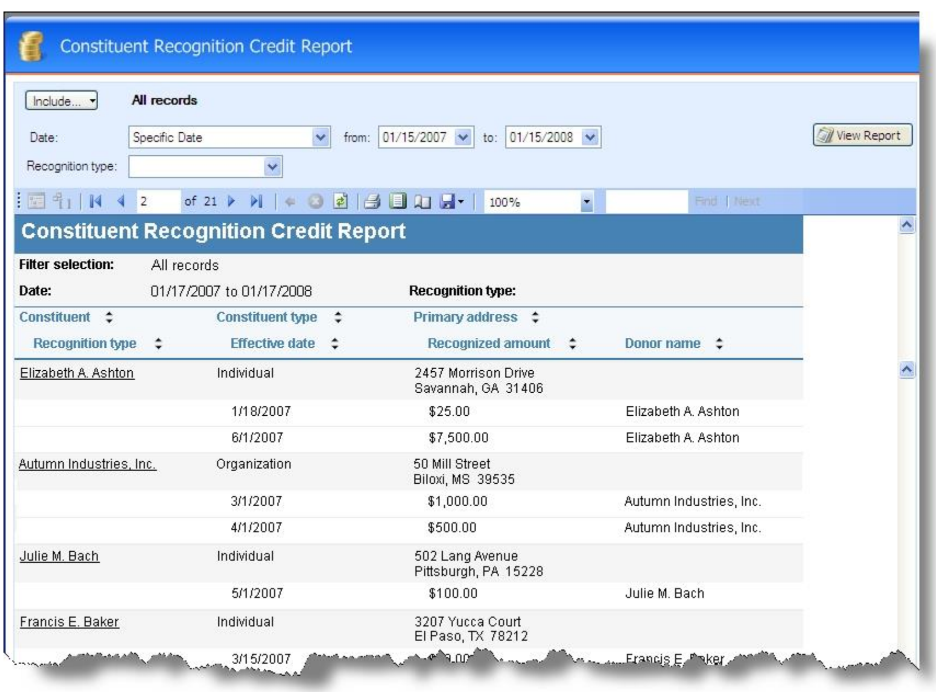
On the Constituent Profile page, You can select the information about the constituent to include in the report. The information available depends on the type of constituent selected, such as individual or household. You can also select which categories of information about the constituent to include in the profile. To update the report with the selected information, click **View report**.

***Note:*** You cannot select a checkbox if its information category does not appear on the constituent record.



# Constituent Recognition Credit Report

To view recognition credit information for a selected group of constituents, generate the Constituent Recognition Credit Report. For example, to prepare to create the Honor Roll list at the end of the month, run the Constituent Recognition Credit Report to correctly recognize constituents for the recognition type of Honor Roll.



For each constituent in the report with recognition credit, the Constituent Recognition Credit Report displays the constituent name, constituent type, and primary address. The report also displays a sub-report that lists the recognition type, the effective date, and the recognition amount associated with recognition credit. The sub-report also displays the donor name for the revenue associated with recognition credit.

When you run a Constituent Recognition Credit Report, filter by specific selections to narrow the data that appears in the report.

Filters for the Constituent Recognition Credit Report include:

- **Include** - To filter by a specific constituent query selection based on criteria you defined, click the binoculars to search for the selection. Depending on your security rights and system role, you can add and edit queries.
- **Date** - To narrow the results, select the date range for which to view constituent recognition credit information.
- **from** - To narrow the report by a specific date range, click the calendar icon to select a start date.
- **to** - To narrow the report by a specific date range, click the calendar icon to select an end date.
- **Recognition type** - Select a recognition credit type to filter the report. For example, select Spouse.

When you generate a report, you can use the toolbar buttons to modify how you view the report. The toolbar buttons are common to all reports.

For more information about the report toolbar, see the *General Features Guide*.

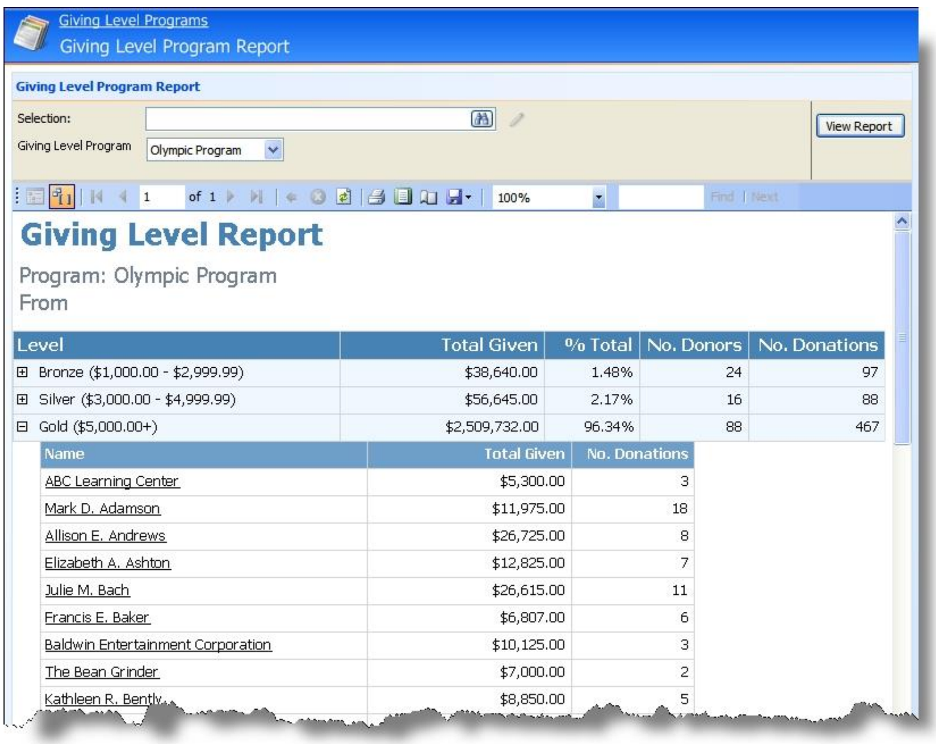
## View the Constituent recognition credit report

1. From *Constituents*, click **Constituent recognition credit** under **Reports**. The Constituent Recognition Credit Report screen appears.
2. Click **Include** and select the records to include. Select All records, Selected records, or Specific record” If you select Selected records or Specific record, in the field that appears,search for the constituent selection or record to include.
3. Enter the date range to filter the report.
   - In the **Date** field, select a date for which to view constituent recognition credit information.
   - If, in the **Date** field, you select Specific date, select the date for which to view constituent recognition credit information. The report will display information only for the selected date.
4. In the **Recognition type** field, select a recognition type to filter the report. For example, select Spouse.
5. Click **View Report**. The program generates and displays the report.
6. To close the report and return to the previous page, on the shell toolbar, click the **Back** button.

# Giving Level Program Report

With the Giving Level Program report, you can view which constituents are members of each level of a giving level program. The report shows summary revenue information about the levels within a program and information about each constituent who reaches a level in a giving program. The report shows the total given, percent of total, number of donors, and number of donations for each level, and the total given and number of donations for each constituent within a level. To view a detailed giving summary of a constituent, click the name of the constituent in the report.

To access the report from *Constituents*, click **Giving level programs** under **Configuration**. On the Giving Level Program page, select the program to include in the report and click **View Report** on the action bar. The Giving Level Program Report screen appears.




In the **Selection** field, search for and select a constituent selection to include in the report. To include all constituents in the report, leave this field blank. To run the report, click **View Report**.

You can print the report or export it in several different formats.

# Tribute Reports

From the Tributes page, you can generate constituent tribute reports. A constituent tribute is a form of constituent recognition. With tributes, you can indicate whether to recognize a donation to your organization in relation (or tribute) to someone else.

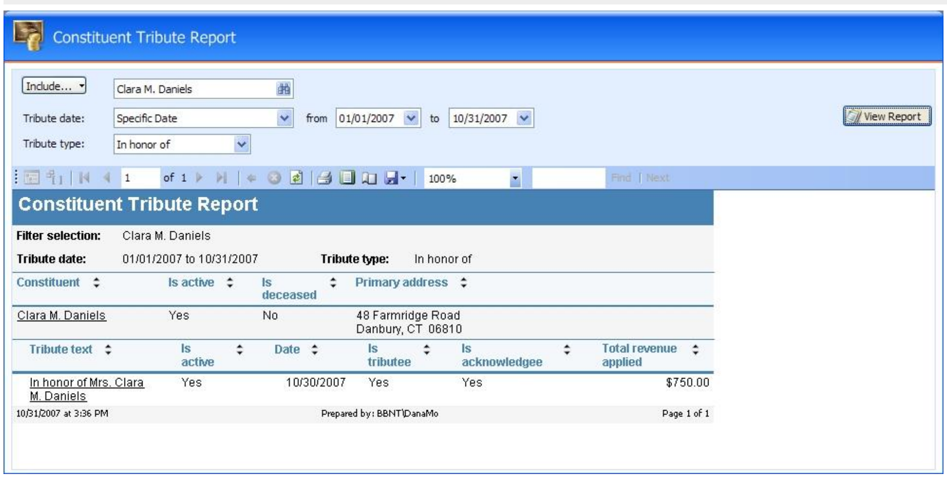
# Constituent Tributes Report

The Constituent Tributes Report displays the tributes associated with selected constituents. For each constituent, the name appears and whether the constituent is active or deceased. The report also displays the constituent's primary address and all tributes associated with the constituent. For each tribute, the report provides the tribute text, whether the tribute is active, the date the tribute was created, how the constituent is associated with the tribute (tributee or acknowledgee), and the total revenue applied to the tribute. From the report, you can click a constituent's name to go to the constituent record and click the tribute text to go to the tribute record.

The Constituent Tributes Report displays the tributes associated with selected constituents. For each constituent, the name appears and whether the constituent is active or deceased. The report also displays the constituent's primary address and all tributes associated with the constituent. For each tribute, the report provides the tribute text, whether the tribute is active, the date the tribute was created, how the constituent is associated with the tribute (tributee or acknowledgee), the total revenue applied to the tribute, and the gross amount of the tribute including Gift Aid. From the report, you can click a constituent's name to go to the constituent record and click the tribute text to go to the tribute record.

To access the report from the Tributes page or *Constituents*, click **Constituent tributes** under **Reports**. The Constituent Tributes report page appears. At the top of the report, click **Include** and select whether to include all records, selected records, or a specific record. If you select Selected records, click search for and select the selection of records to use. If you select Specific record, search for and select the constituent. You can then select a tribute date and tribute type. After you define the parameters for the report, click **View report**.

***Note:*** To access the Constituent Tributes Report from *Analysis*, click **Tribute reports** and then **Constituent tributes**.




You can print the report or save the report as an *Excel* spreadsheet or *Acrobat* PDF file.

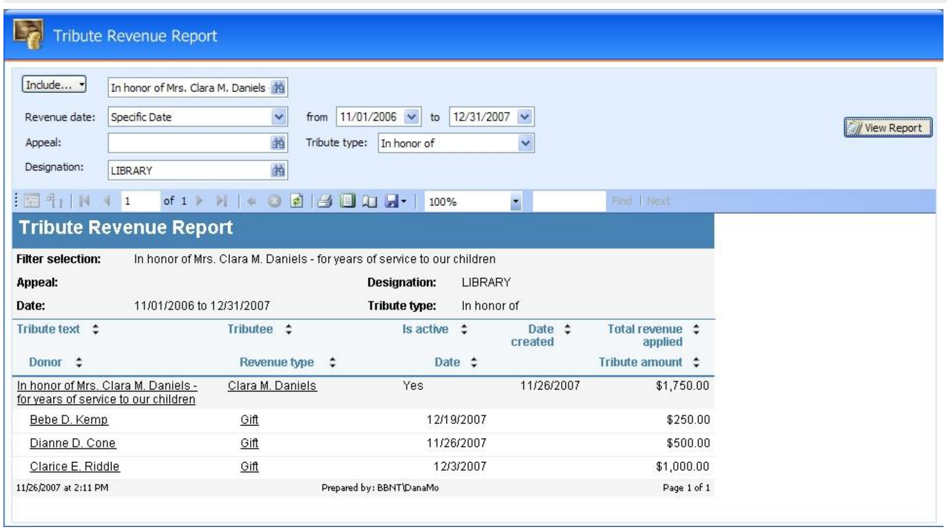
# Tribute Revenue Report

The Tribute Revenue Report displays the revenue records applied to selected tributes. For each tribute, the tribute text, tributee, whether the tribute is active or inactive, the date created, and the total revenue applied to the tribute appears. For each tribute, the report displays the donors for the tribute, revenue types, revenue dates, and revenue amounts. From the report, you can click a constituent's name to go to the constituent record and click the revenue type to go to the revenue record.

The Tribute Revenue Report displays the revenue records applied to selected tributes. For each tribute, the tribute text, tributee, whether the tribute is active or inactive, the date created, and the total revenue applied to the tribute with and without Gift Aid appears. For each tribute, the report displays the donors for the tribute, revenue types, revenue dates, and revenue amounts with and without Gift Aid. From the report, you can click a constituent's name to go to the constituent record and click the revenue type to go to the revenue record.

To access the report from the Tributes page, click **Tribute revenue** under **Reports**. The Tribute Revenue report page appears.

***Note:*** To access the Tribute Revenue Report from *Analysis*, click **Tribute reports** and then **Tribute revenue**.




At the top of the report, click **Include** and select whether to include all records, selected records, or a specific record. If you select Selected records, search for and select the selection of tributes to include. If you select Specific record, search for and select the tribute. You can then select a date or date range and type of the tribute or appeal and designation of the revenue transaction. Once you define the parameters for the report, click **View report**.

You can print the report or save the report as an *Excel* spreadsheet or *Acrobat* PDF file.

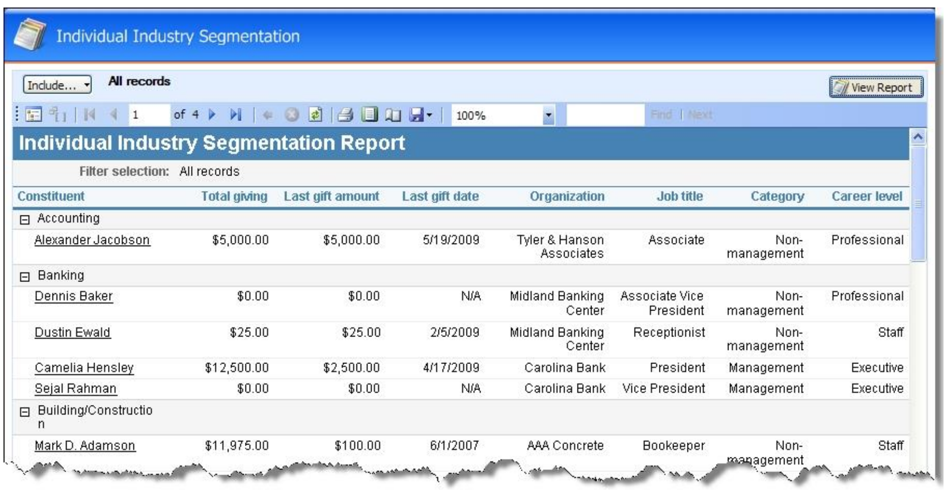
# Industry Analysis Reports

The industry segmentation reports provide basic information about individuals or organizations grouped by industry, along with giving totals. You can use these reports to analyze giving trends by industry and target future solicitations.

## Individual Industry Segmentation Report

The Individual industry segmentation report provides basic information about constituents grouped by industry. The report includes a breakdown for comparison of constituent giving and organization. A constituent could show up under different industries in the report, if the individual is associated with multiple organizations. You can use this report to analyze giving trends by industry and target future solicitations.

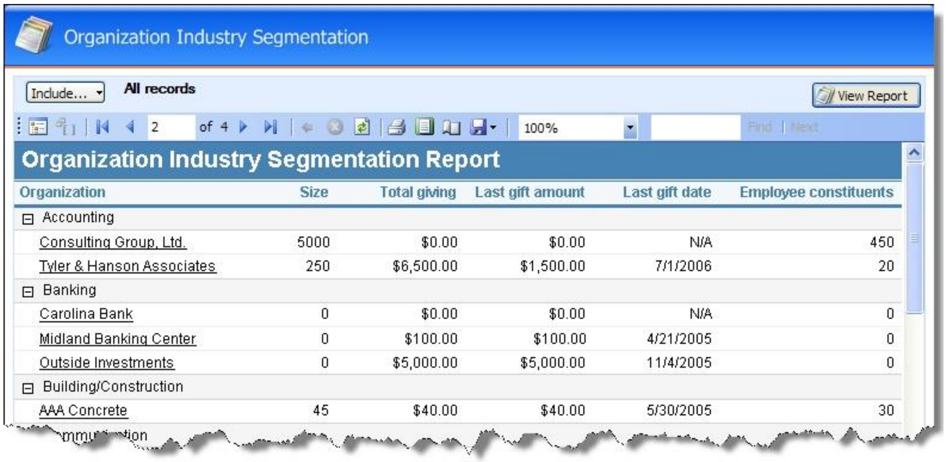
From *Analysis*, click **Constituent reports**, then **Individual industry segmentation**. Select whether to include all individuals or only selected individuals, and click **View Report**.




## Organization Industry Segmentation Report

The Organization industry segmentation report provides basic information about organizations grouped by industry. The report includes a breakdown for comparison of organization size, giving, and number of employees who are also constituents. You can use this report to analyze giving trends by industry and target future solicitations.

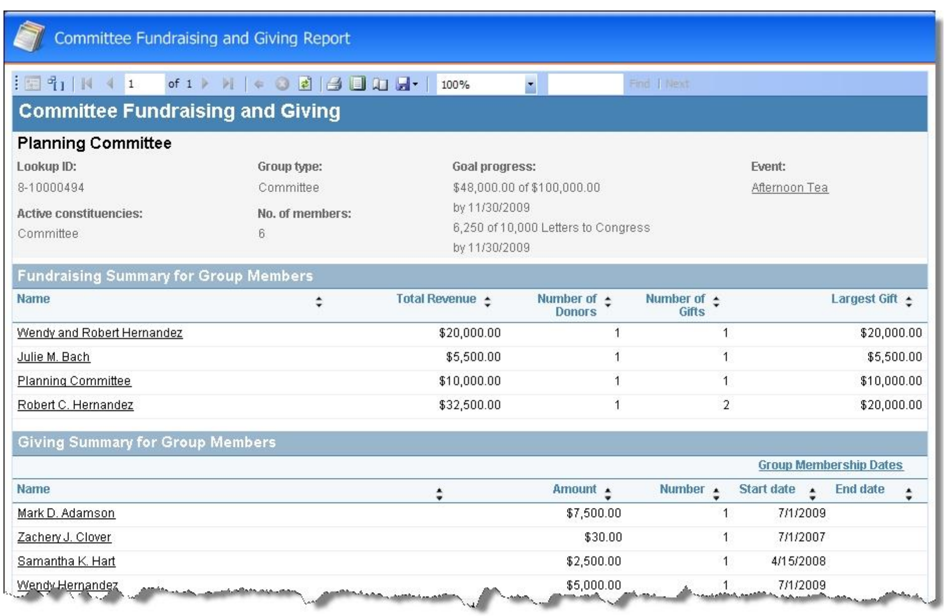
From *Analysis*, click **Constituent reports**, then **Industry segmentation**. Select whether to include all organizations or only selected organizations, and click **View Report**.




# Committee Fundraising and Giving Report

The Committee fundraising and giving report is available for committees that can solicit revenue. It provides revenue information about how much the committee has raised as a solicitor along with how much they have given themselves (as individual committee members and as the committee). In the giving summary for the group members, additional information about the group members is shown, such as group membership dates. If the committee has goals or helps coordinate events, that information is also included.

From the record of a group with a constituency of Committee, click **Committee** under **View as**. The Committee page appears. On this page, click **Committee fundraising and giving report** under **Reports**.



# Recognition Program Reports

Recognition program reports analyze data about recognition programs. Use the Recognition Revenue Report to display revenue transaction details and use the Recognition Count Report to generate a list of constituents.

## Recognition Revenue Report

The Recognition Revenue Report displays revenue transaction details for a recognition program in a time frame that you specify.


### View the Recognition Revenue Report

1. From *Constituents*, click **Recognition Programs**. The Recognition Programs page appears.
2. Under **Reports**, click **Recognition revenue**. The Recognition Revenue report screen appears.
3. Select a recognition program to include in the report.
4. In the **Date** field, select a time period for the recognition revenue information.

   If you select Specific date, enter the date range for the report.
5. Click **View report**.

### View the Recognition Statistics Comparison Report

1. On the Recognition Programs page, click **Recognition Statistics Comparison Report** under **Reports**. The Recognition Statistics Comparison Report screen appears.
2. In the **This period** field, select a current time period for the report.

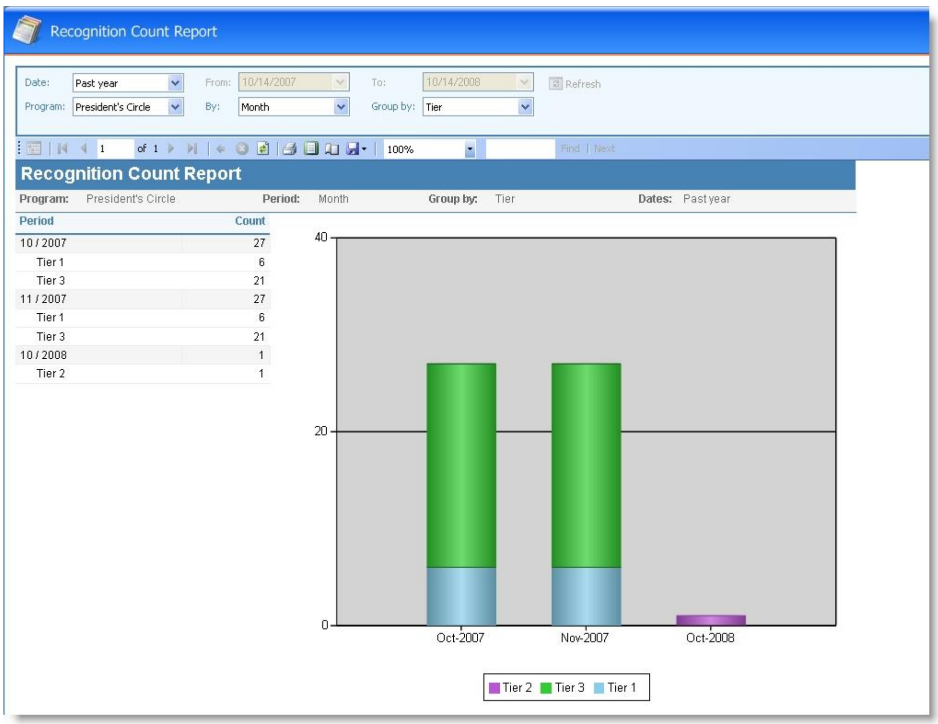
   If you select "Specific date," enter a start date and end date for the current time period.
3. In the **Last period** field, select a past time period for the report.

   If you select "Specific date," enter a start date and end date for the past time period.

4. In the **Program** field, select a program to use for the report results.
5. In the **Group by** field, select to group report results by channel or activity. You must select a group option.
6. To refresh the data and view the report, click **Refresh**.
7. To close the report and return to the previous page, on the shell toolbar, click the **Back** button.

# Recognition Count Report

To generate a list of constituents in a recognition program, generate the Recognition Count Report. You can select to group report results by recognition type or level.




## View the Recognition Count Report

1. On the Recognition Programs page, click **Recognition count**under **Reports**. The Recognition Count report screen appears.
2. In the **Date** field, select a time period for the recognition count.

   If you select Specific date, enter a date range for the report.
3. Select the recognition program to include in the report.
4. In the **By** field, select whether to calculate the count by a monthly, quarterly, or yearly interval.
5. In the **Group by** field, select whether to display the results by recognition type or level.
6. To refresh the data and view the report, click **View report**.

# Event Reports



## Event Profile Report

With the Event Profile report, you can view information about an event, such as its coordinators, location, seating, expenses, and more. The Event Profile report also includes information about event registrants, such as date registered, host, and balance.


### View an event profile report

1. On an event record, click **Event profile** under **Reports**. The Event Profile report page appears.

***Note:*** To view the Event Profile report from *Events*, click **Event profile** under **Reports** and search for and select the event to generate its report. To view the report from *Analysis*, click **Event reports** and **Event profile**, and search for and select the event to generate the report.

2. In the **Event** field, select the event to view information.

***Note:*** The invited count in the **Event Details** section of this report is based on the number of invitees in the Invitee list of the event's Invitations tab.

3. In the **Show sections** field, select the types of information to display in the report.

***Tip:*** When you select **Event details**, the report displays detail information about the event and its registrants, including the number of constituents that were invited to the event but did not register. To display a list of the constituents that did not respond to an invitation, select **Did not respond**. From this list, you can open the record of a constituent who did not respond.

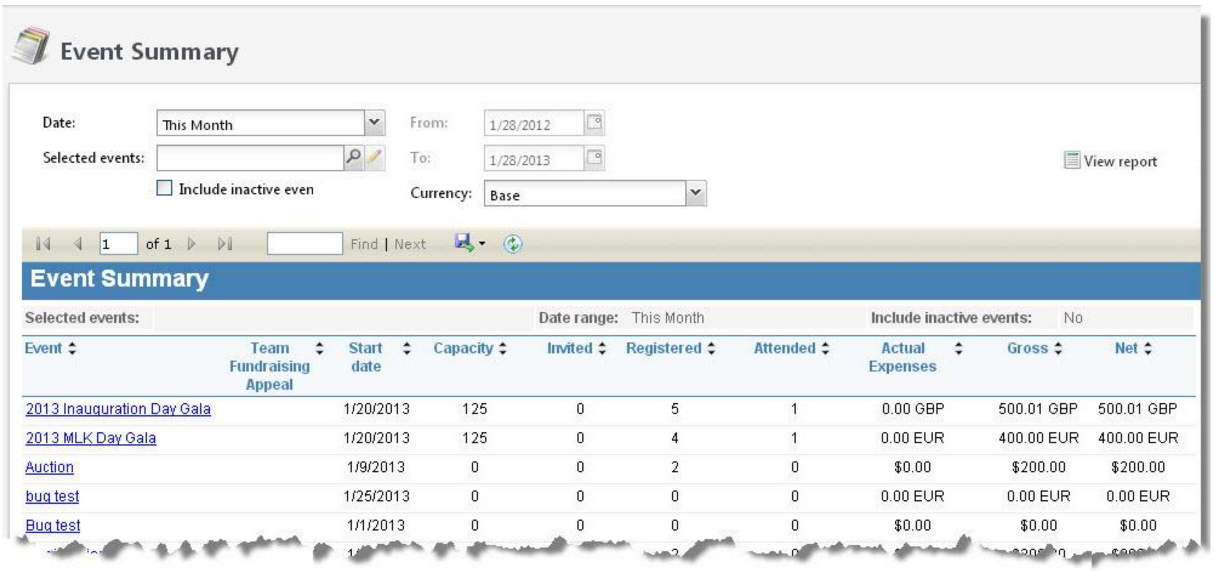
4. Click **View Report**. The Event Profile report generates and displays the information.

# Event Summary Report

With the Event Summary report, you can view information about multiple events, based on a selection, along with the event details. The Event Summary Report includes information about the event such as the start date, how many people were invited/registered/attended, event income and expense information, and more.

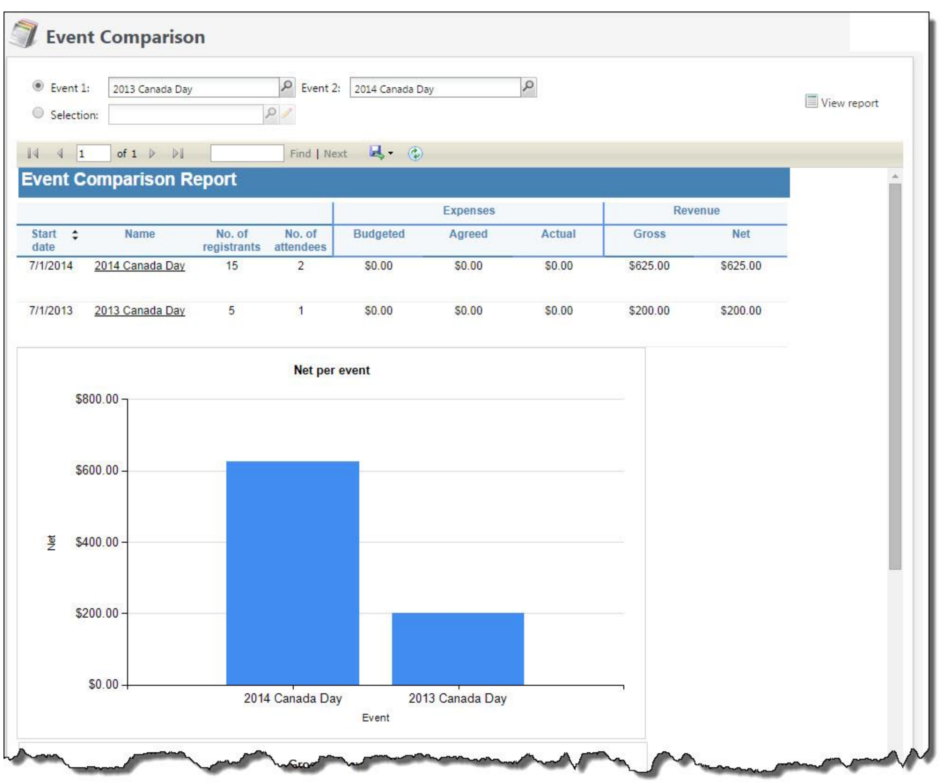
### View an event summary report

1. From *Reports*, select Event reports.
2. Click **Event summary**. The Event Summary Report page appears.
3. At the top of the page, click the magnifying glass to pick a selection of events to include. You can also select a date range and whether or not to include information about inactive events.
4. To view the report, click the refresh button. The Event Summary with the selected information appears.




# Event Comparison Report

The Event Comparison report compares the effectiveness of multiple events. For example, you can use this report to compare the effectiveness of an annual event over consecutive years. To open the Event Comparison report from *Events*, click **Event comparison** under **Reports**. The Event Comparison report page appears.



To run the report, select two events or a selection of multiple events to compare and click **View Report**. The report compares the performance of the selected events and displays the number of registrants and attendees, expenses, and the gross and net amounts raised for each event.

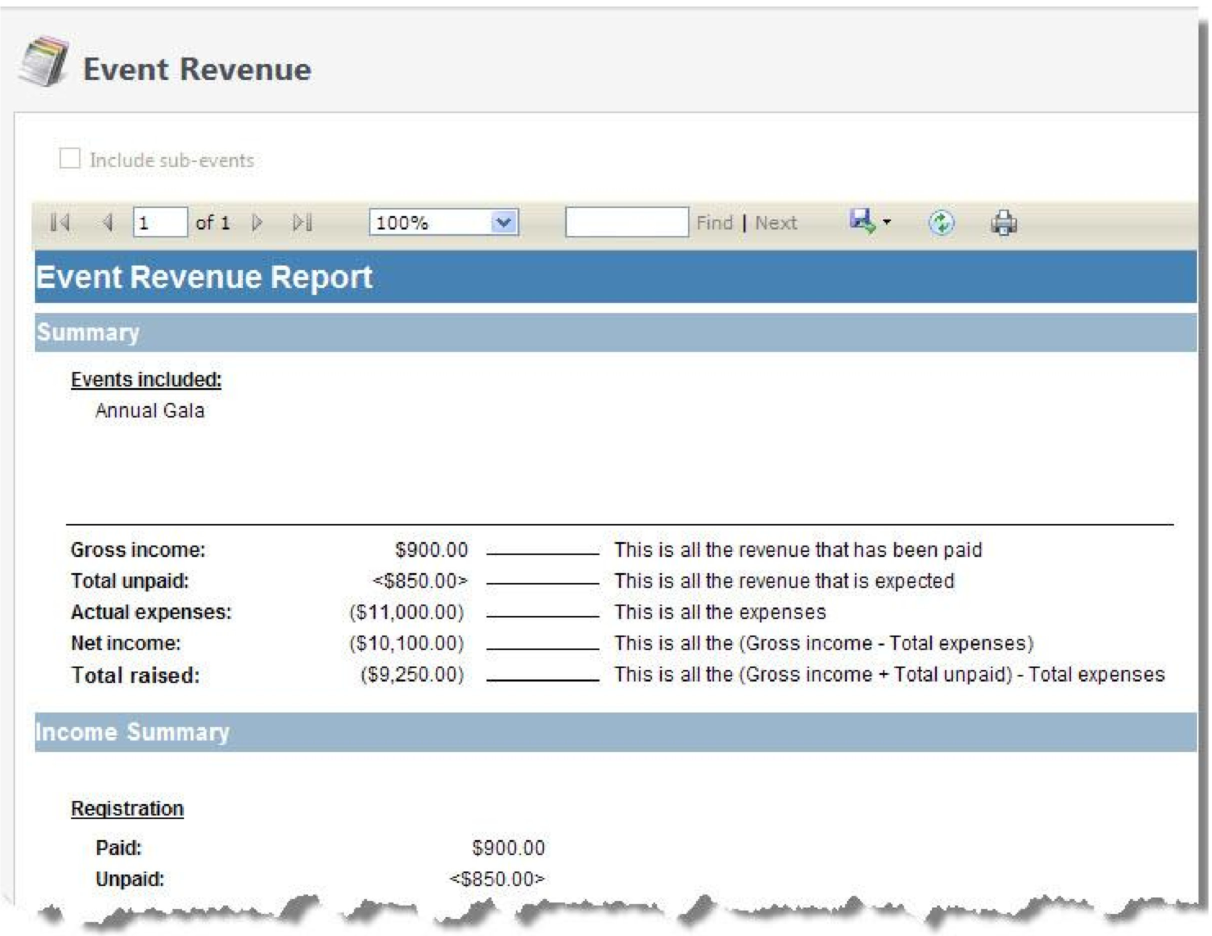
For events with a team fundraising appeal and fundraising teams, you can view additional charts to compare team fundraising effectiveness. For each event, you can view the number of teams and the total raised by each team and collectively. The report also generates charts to compare the income raised by each event and the average amount raised per team for each event.

***Note:*** The **Average Amount Raised Per Team** comparison includes only donations associated with an event's team fundraising appeal and solicitors.

You can print the report or export it in different formats.

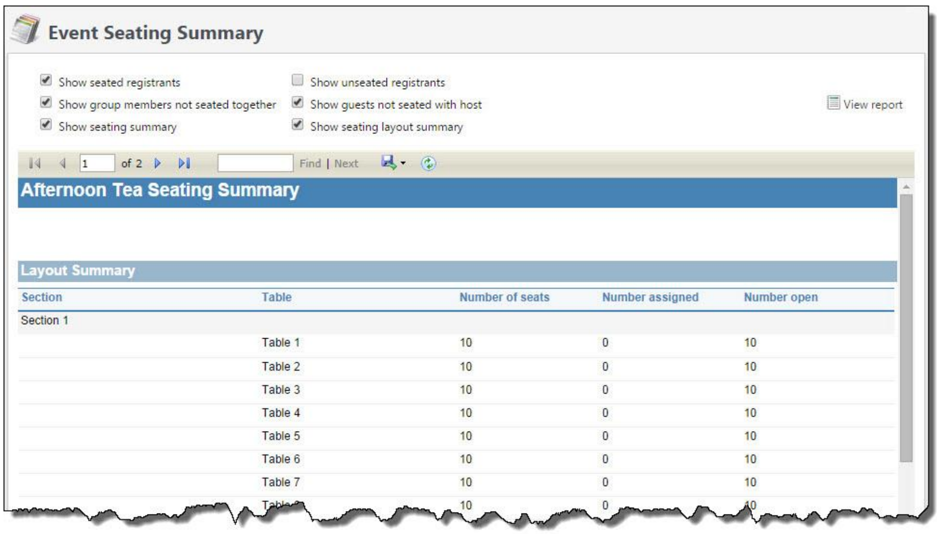
# Event Revenue Report

The Event Revenue report shows a breakdown and comparison of revenue and expenses for the event. For multi-level events, the report can display information for only the event or for the event and sub-events. To open the Event Revenue report, go to an event and click **Event revenue** under **Reports**. The Event Revenue report page appears.



# Seating Summary Report

With the Seating Summary report, you can view information about how you seated registrants for a specific event. You can run a report to determine which registrants have been seated or not, which group members are not seated together or with their host, and you can view an overall seating summary and seating layout summary.



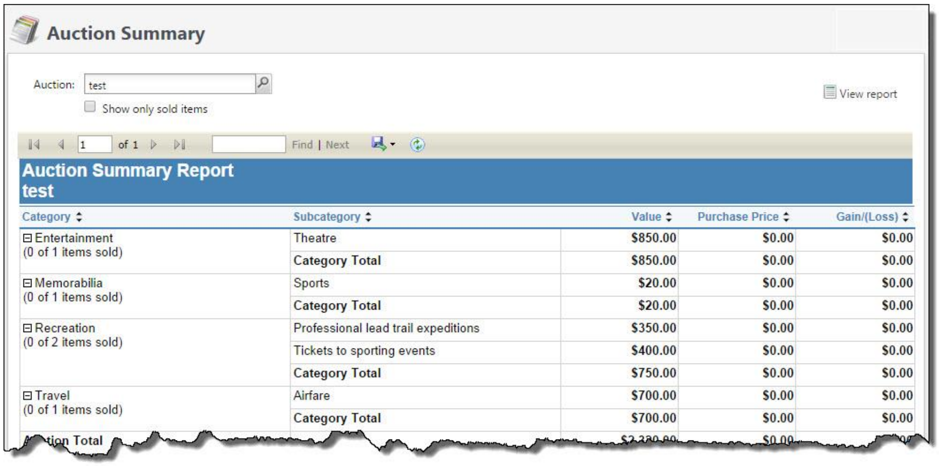

### View an event seating summary report

1. Locate the event to generate an event seating summary report.
2. Click **View seating summary** under **Tasks**. The Seating summary page appears.
3. At the top of the page, select the information to include on the report, such as **Show seated registrants** and **Show unseated registrants**.
4. To generate the report, click **View report**. The Seating Summary report with the information you selected appears.

# Auction Summary Report

With the Auction Summary report, you can view information about an auction event before or after it occurs. The Auction Summary report includes information about the auction such as the category and subcategory of each item purchased, the total value of the item in each category, the purchase price, and the gain/loss. You can also view more details such as each individual item in the auction. You can click each item to view its item record. An asterisk (*) next to an item indicates that it was sold as part of a package.

You can print the report or export it in different formats.




### View an auction summary report

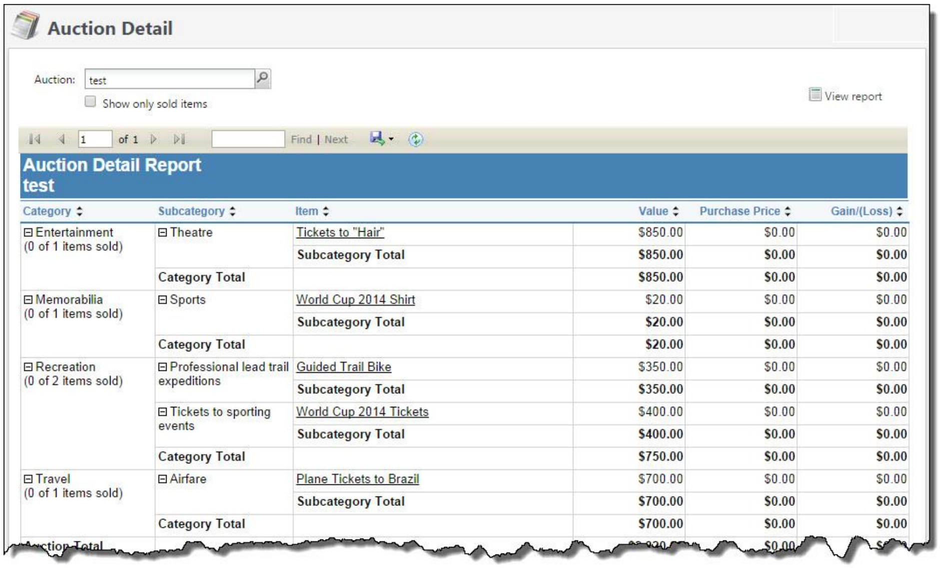
1. To view an auction summary report, open the record of the auction event.
2. Under **Reports**, click **Auction summary**. The Auction Summary report page appears.
3. At the top of the page, search for and select an auction event.
4. To view only the items that were sold during the auction, select the **Show only sold items** checkbox at the top of the page.
5. To view the report, click the **View report** button. The Auction Summary report appears.

***Note:*** With *Multicurrency*, in the **Currency** field, you can select whether to display the report in the transaction currency of the items in the auction, or the base currency of your organization.

# Auction Detail Report

With the Auction Detail report, you can view information about an auction event before or after it occurs. The Auction Detail report includes information about the auction such as the items purchased, the category and subcategory of each item purchased, the value of the item, its purchase price, and the gain/loss. You can click each item to view its item record. An asterisk (*) next to an item indicates that it was sold as part of a package.

You can print the report or export it in several different formats.




| Category | Subcategory | Item | Value | Purchase Price | Gain/(Loss) |
|---|---|---|---|---|---|
| Entertainment (0 of 1 items sold) | Theatre | Tickets to "Hair" | $850.00 | $0.00 | $0.00 |
| | | Subcategory Total | $850.00 | $0.00 | $0.00 |
| | Category Total | | $850.00 | $0.00 | $0.00 |
| Memorabilia (0 of 1 items sold) | Sports | World Cup 2014 Shirt | $20.00 | $0.00 | $0.00 |
| | | Subcategory Total | $20.00 | $0.00 | $0.00 |
| | Category Total | | $20.00 | $0.00 | $0.00 |
| Recreation (0 of 2 items sold) | Professional lead trail expeditions | Guided Trail Bike | $350.00 | $0.00 | $0.00 |
| | | Subcategory Total | $350.00 | $0.00 | $0.00 |
| | Tickets to sporting events | World Cup 2014 Tickets | $400.00 | $0.00 | $0.00 |
| | | Subcategory Total | $400.00 | $0.00 | $0.00 |
| | Category Total | | $750.00 | $0.00 | $0.00 |
| Travel (0 of 1 items sold) | Airfare | Plane Tickets to Brazil | $700.00 | $0.00 | $0.00 |
| | | Subcategory Total | $700.00 | $0.00 | $0.00 |
| | Category Total | | $700.00 | $0.00 | $0.00 |

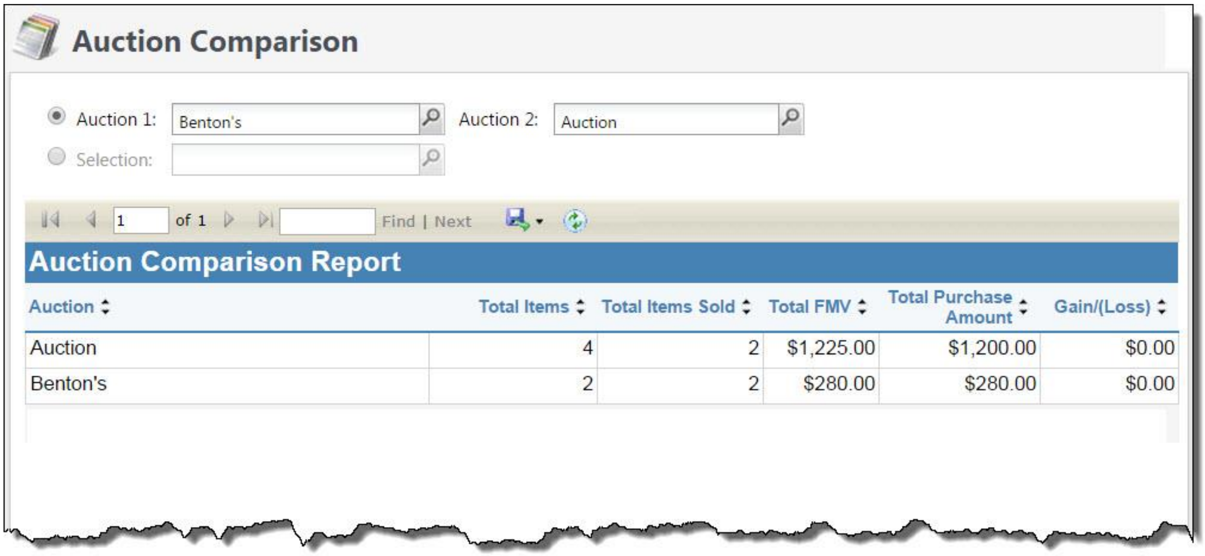
### View an auction detail report

1. To generate the detail report, open the record of the auction event.
2. Under **Reports**, click **Auction detail**. The Auction Detail report page appears.
3. At the top of the page, search for and select an auction event.
4. To view only the items that were sold during the auction, select the **Show only sold items** checkbox at the top of the page.
5. To view the report, click the **View Report** button. The Auction Detail report appears.

***Note:*** With *Multicurrency*, in the **Currency** field, you can select whether to display the report in the transaction currency of the items in the auction, or the base currency of your organization.

# Auction Comparison Report

The Auction Comparison report compares the results of auction events. For example, you can use this report to compare the total gain or loss of multiple auctions. To view the report, from *Events*, click **Auction comparison** under **Reports**. The auction comparison page appears.




To run the report, select two auction events to compare, or use a selection of auction events to include in the report. After you select your auctions, click **View report**. The report compares the results of each auction and displays the total number of items in each auction, the total number of items sold, the total fair market value (FMV), the total purchase amount, and gain/loss.

With *Multicurrency*, you can use the **Currency** filter to view the results in the transaction currency of the items in the auction or the organization's base currency.

You can print the report or export it in different formats.

# Fundraising Reports

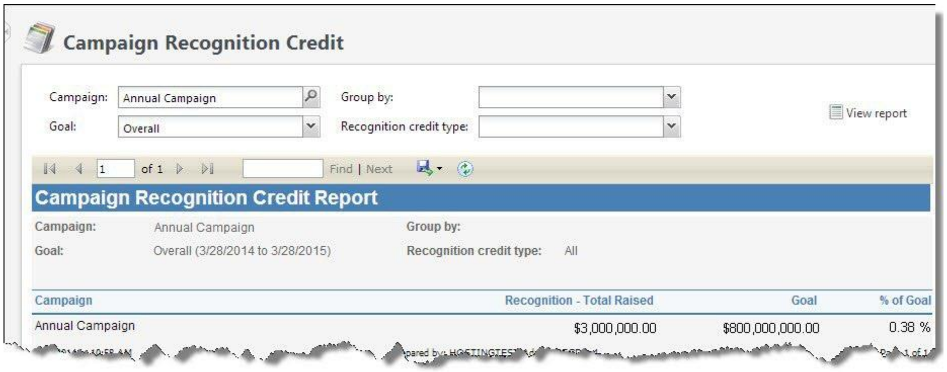


From *Fundraising*, you can track the effectiveness of your fundraising activities, as well as the performance of individual fundraisers. A variety of reports are available to help you measure your organization's progress toward meeting specific goals.

## Campaign Recognition Credit Report

The Campaign Recognition Credit Report shows progress toward a specific goal, including total recognition credit, and percent of goal for the campaign selected.

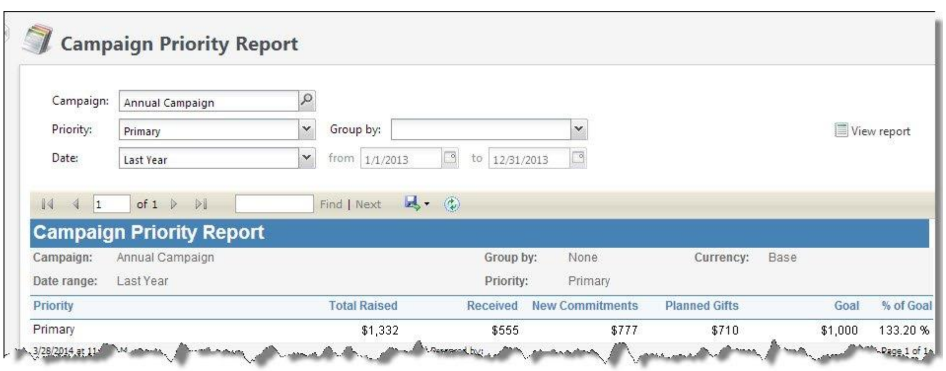
To run the report, open a campaign and click **Campaign recognition credit report** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report. You can also filter the report based on the type of recognition credit you want to include.




# Campaign Priority Report

The Campaign Priority Report shows progress toward specific priority goals, including total raised, total received, new commitments, the total amount of planned gifts, and percent of goal for the campaign selected. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, minus any write-off amounts.

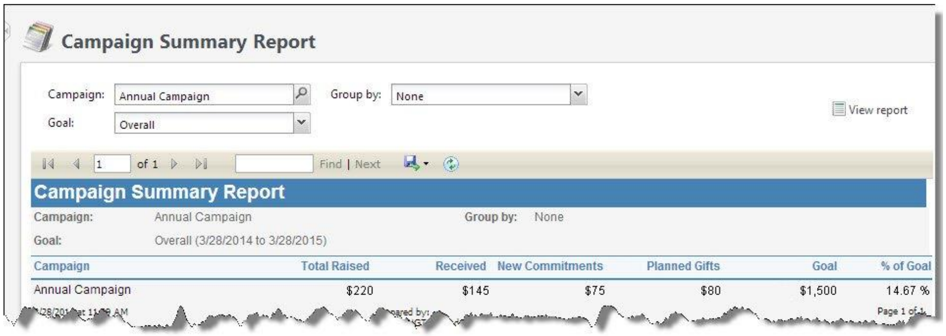
To run the report, open a campaign and click **Campaign priority report** under **Reports**. Select a date range and click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report. You can also filter the report based on the priorities for the campaign.




# Campaign Summary Report

The Campaign Summary Report shows progress toward a specific goal, including total raised, how much has been received, new commitments, the total amount of planned gifts, and percent of goal for the campaign selected. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges.

To run the report, open a campaign and click **Campaign summary report** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report.




# Hierarchical Campaign Summary Report

While the Campaign Summary Report shows progress toward a specific goal for top-level campaigns in the hierarchy, the Hierarchical Campaign Summary Report displays details for all or selected campaigns and goals in the campaign hierarchy.

You can view information for the entire campaign, the root campaign, or selected campaigns in the hierarchy. To view specific campaigns, select the checkbox for each parent and child campaign to include in the report. Select the parent campaign's checkbox to automatically select all campaigns under the parent. You can then choose which of these child campaigns to include. To select only the parent campaign, press **CTRL** and click the parent campaign's checkbox.

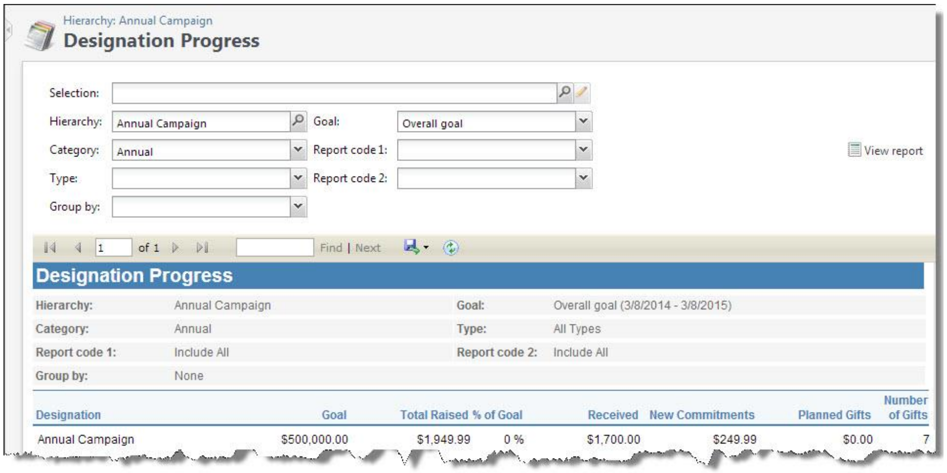
Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *Data Mart and OLAP Guide*.

To run the report, open a campaign and click **Hierarchical campaign summary report** under **Reports**.

# Designation Progress Report

The Designation Progress report shows progress toward a specific goal by total raised, percent of goal, how much has been received, new commitments, the total amount of planned gifts, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. The totals are broken down by designation under the parent purpose.

To run the report, open a fundraising designation and click **Designation progress** under **Reports**. On the report, you must specify a **Goal** against which you want to measure progress before you can run the report. When a selection exists that already includes the filters you want to use in the report, you can specify it in the **Selection** field. After you select a goal and any other filters, click **View Report**.

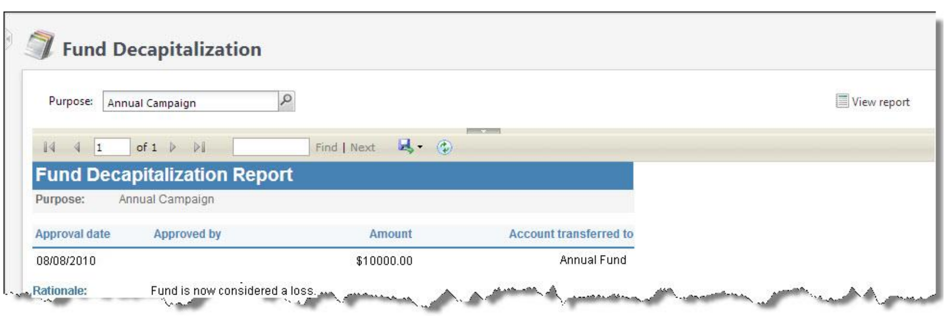



You can print the report or export it in several different formats.

# Fund Decapitalization Report

When the market value of a fundraising purpose falls below the book value, you can decapitalize an amount of the fundraising purpose. After your organization approves the decapitalization of a fundraising purpose, you can decapitalize all or some of the purpose value to indicate that your organization should not disburse revenue from the purpose. The Fund Decapitalization report provides information about the decapitalized amounts of a purpose, including its approval and the designation into which to transfer the decapitalized amount.

To run the report for a fundraising purpose, open the record of a purpose and click **Fund decapitalization** under **Reports**. By default, the report includes the purpose from which you access the report. On the Fund Decapitalization report page, select the fundraising purpose to include and click **View Report**.

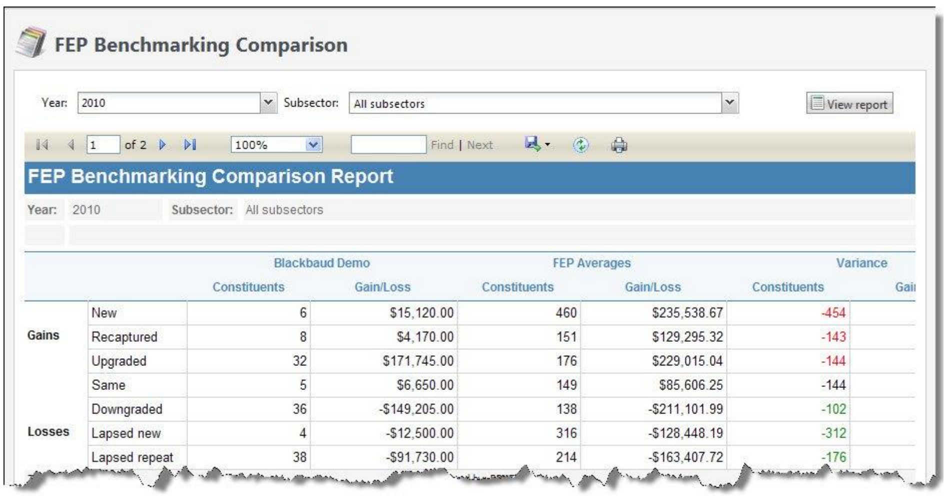



You can print the report or export it in several different formats.

# Fundraising Effectiveness Project (FEP) Benchmarking Comparison Report

To measure and compare your organization's fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. From *Administration*, your organization can create and run a process to compile and submit information to the AFP for the FEP survey. When you run the FEP submit process, the program compares the payment activity during two consecutive time periods, including donations and payments toward commitments such as pledges and recurring gifts, and breaks down the activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

The FEP Benchmarking Comparison report shows your annual performance in comparison to the averages compiled by AFP from FEP survey participants for the same year. You can use this comparison to help identify areas to improve and to help increase revenue.




| | | Blackbaud Demo | | FEP Averages | | Variance | |
|---|---|---|---|---|---|---|---|
| | | Constituents | Gain/Loss | Constituents | Gain/Loss | Constituents | Gai |
| Gains | New | 6 | $15,120.00 | 460 | $235,538.67 | -454 | |
| | Recaptured | 8 | $4,170.00 | 151 | $129,295.32 | -143 | |
| | Upgraded | 32 | $171,745.00 | 176 | $229,015.04 | -144 | |
| | Same | 5 | $6,650.00 | 149 | $85,606.25 | -144 | |
| Losses | Downgraded | 36 | -$149,205.00 | 138 | -$211,101.99 | -102 | |
| | Lapsed new | 4 | -$12,500.00 | 316 | -$128,448.19 | -312 | |
| | Lapsed repeat | 38 | -$91,730.00 | 214 | -$163,407.72 | -176 | |

To run the FEP Benchmarking Comparison report, from *Fundraising*, click **FEP benchmarking comparison** under **Reports**. Select the year of the data to compare. In the **Subsector** field, select whether to view the averages of all verticals of FEP survey participants or only those related to a specific vertical. To include only information submitted to AFP for a specific site at your organization, in the **Site** field, select the site associated with the data to compare. After you select the criteria of the information to include, click **View Report**.

The report displays the constituent and revenue information your organization submitted to AFP for the selected year. For comparison, the report also displays the selected year's FEP averages and the variance between the two for the various FEP statistics.

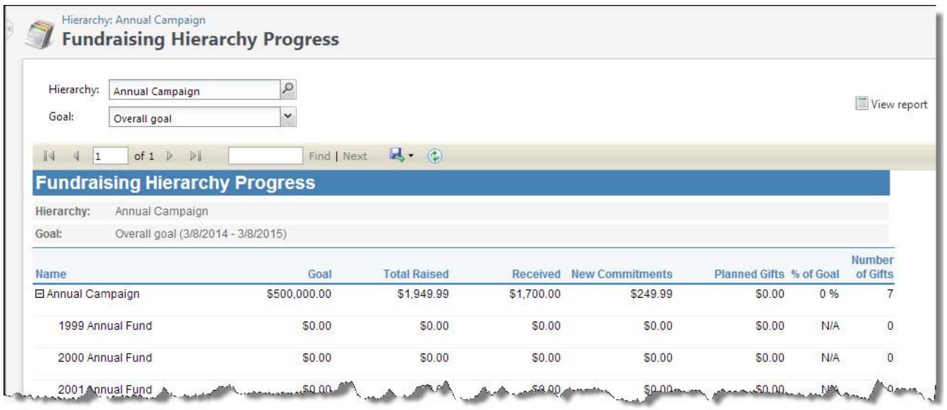
On the second page of the report, you can view bar graphs of the statistics to quickly compare your organization's performance to the FEP averages.

You can print the report or export it in several different formats.

# Fundraising Hierarchy Progress Report

The Fundraising Hierarchy Progress report shows progress of the purposes and designations in a hierarchy toward a specific goal. The report shows total raised, how much has been received, new commitments, the total amount of planned or legacy gifts, percent of goal, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. The totals are broken down by designation.

***Note:*** To prevent double-counting of pledges made and installments paid during the same time period, totals in the **Received** column do not include payments applied toward pledge installments.

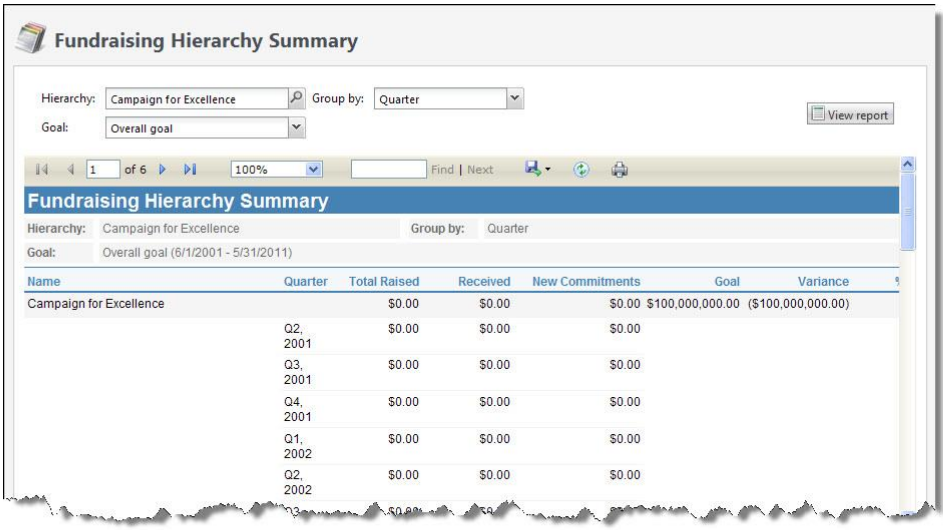



To run the report, open a fundraising purpose and click **Fundraising hierarchy progress** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**.

You can print the report or export it in several different formats.

# Fundraising Hierarchy Summary Report

The Fundraising Hierarchy Summary report shows progress toward a specific goal, including total raised, how much has been received, new commitments, the total amount of planned or legacy gifts, variance between a goal amount and actual amount raised, and percent of goal. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges.




To run the report, open a fundraising purpose and click **Fundraising hierarchy summary** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report.

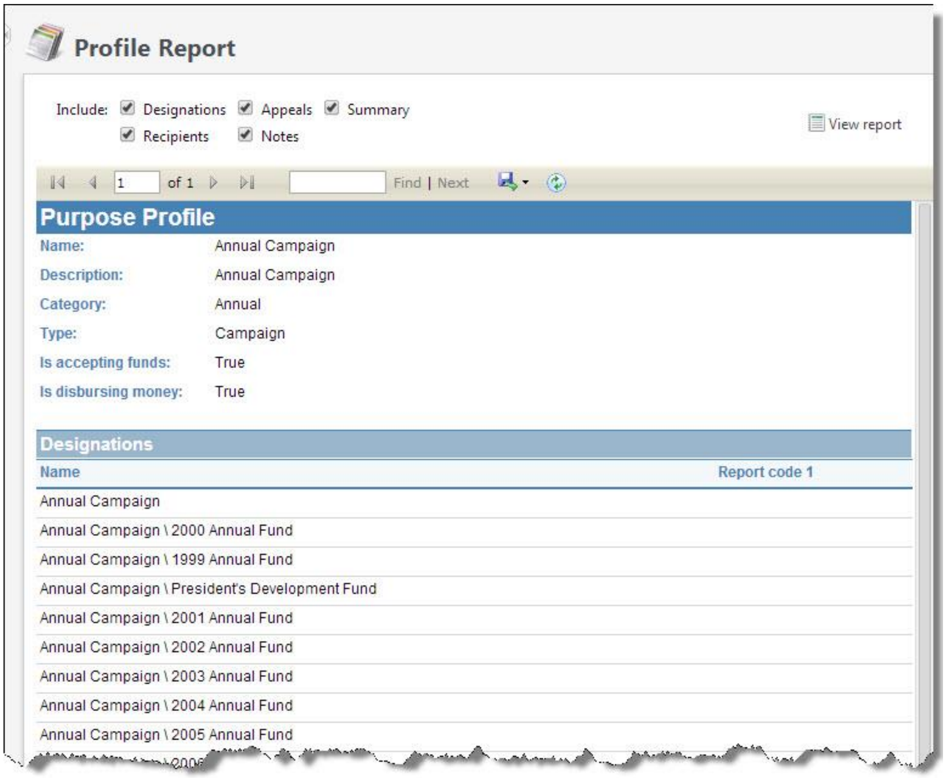
You can print the report or export it in several different formats.

# Fundraising Purpose Profile Report

With the Fundraising Purpose Profile report, you can show every designation, appeal, recipient, and note associated with a purpose. You can also select to include a giving summary that shows the total raised, average gift amount, total number of gifts, and total number of donors.

To run the report, open a fundraising purpose and click **Purpose profile** under **Reports**.

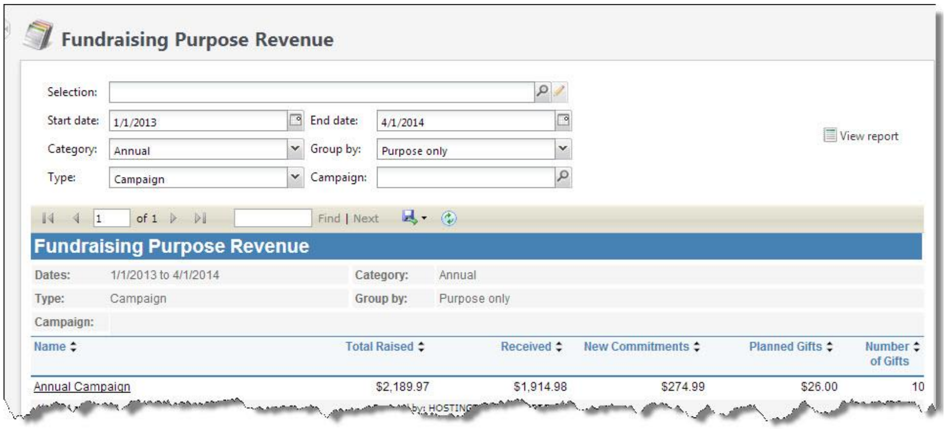
You can print the report or export it in several different formats.




# Fundraising Purpose Revenue Report

The Fundraising Purpose Revenue report shows revenue for a purpose by total raised, how much has been received, new commitments, the total amount of planned gifts, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. To run the report, open a fundraising purpose and click **Fundraising purpose revenue** under **Reports.** To run the report for a specific fundraising purpose or for a group of purposes, use a selection.

The other report fields enable you to filter the results according to your preferences. If a selection exists that already includes the filters you want to use in the report, you can specify it in the **Selection** field. The **Start date** defaults to the first day of the current calendar year and the **End date** defaults to the current date. You can change these dates and additionally filter the report by a specific category or fundraising purpose type.

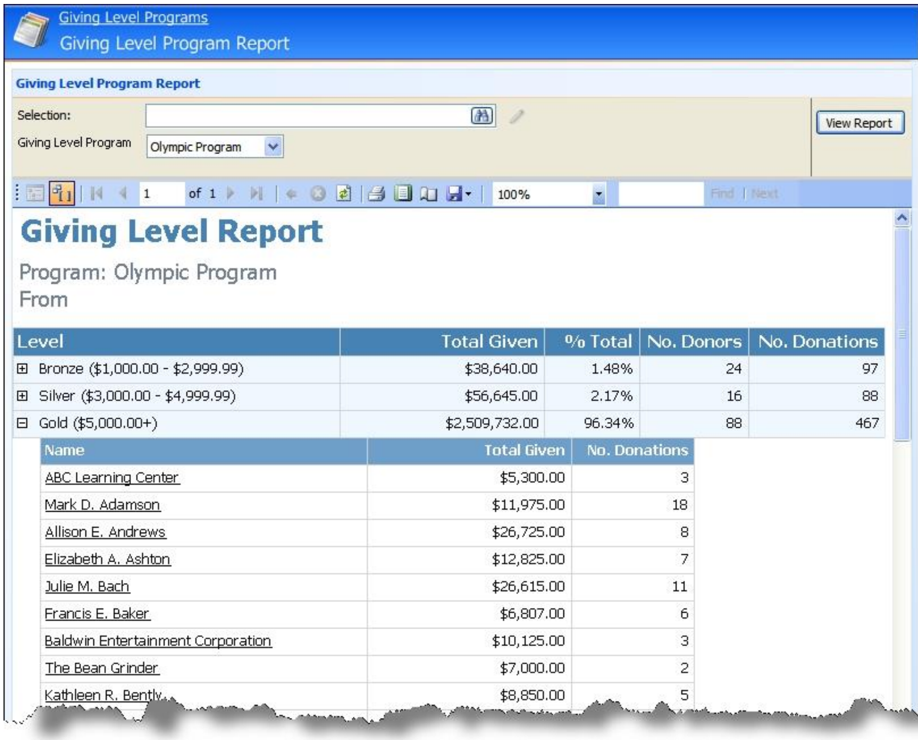



You can print the report or export it in several different formats.

# Giving Level Program Report

With the Giving Level Program report, you can view which constituents are members of each level of a giving level program. The report shows summary revenue information about the levels within a program and information about each constituent who reaches a level in a giving program. The report shows the total given, percent of total, number of donors, and number of donations for each level, and the total given and number of donations for each constituent within a level. To view a detailed giving summary of a constituent, click the name of the constituent in the report.

To access the report from *Constituents*, click **Giving level programs** under **Configuration**. On the Giving Level Program page, select the program to include in the report and click **View Report** on the action bar. The Giving Level Program Report screen appears.



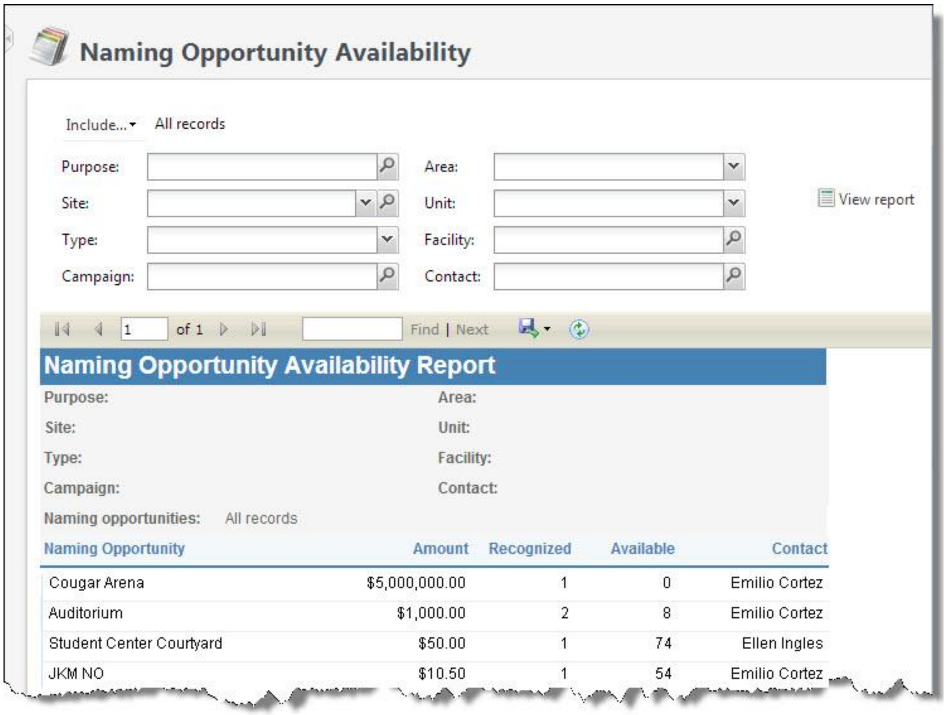

In the **Selection** field, search for and select a constituent selection to include in the report. To include all constituents in the report, leave this field blank. To run the report, click **View Report**.

You can print the report or export it in several different formats.

# Naming Opportunity Availability Report

The Naming Opportunity Availability report enables you to see which naming opportunities have been purchased and which are still available. You can view the report based on criteria such as fundraising purpose, campaign, facility, or any combination of these filters. To run the report, from the *Fundraising* page, click **Naming opportunity availability** under **Reports**.

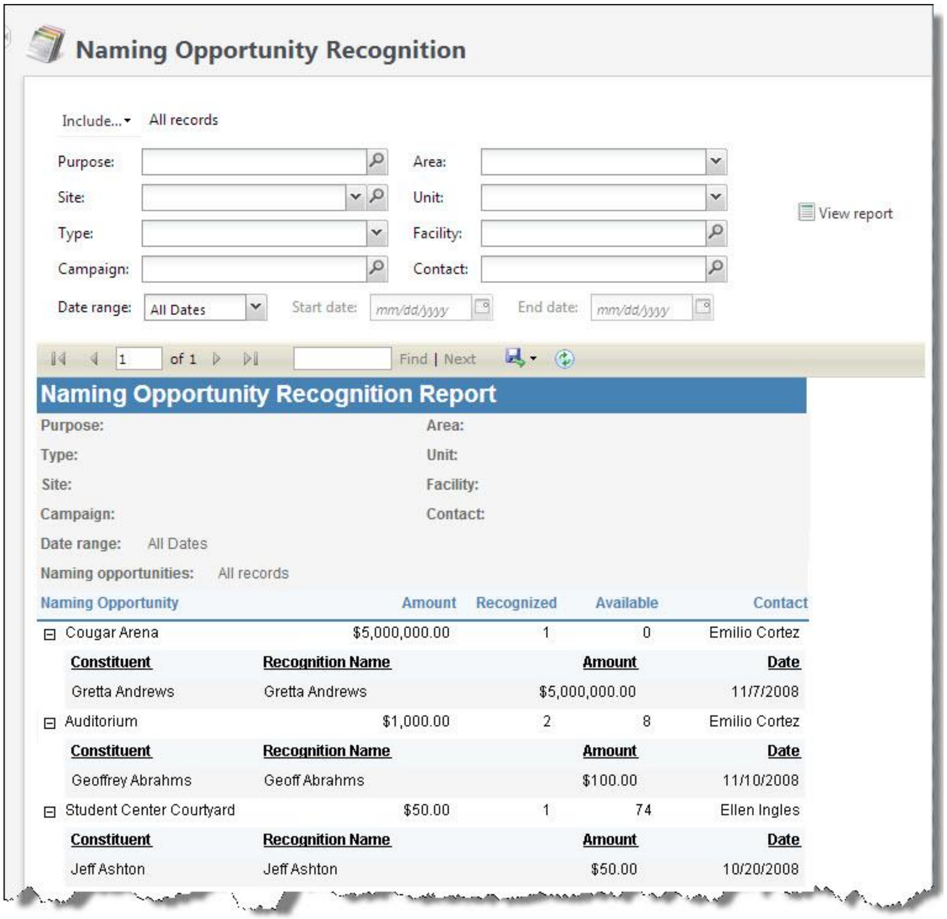
You can print the report or export it in several different formats.




# Naming Opportunity Recognition Report

The Naming Opportunity Recognition report generates a list of constituents recognized on naming opportunity items. To run the report, from the *Fundraising* page, click **Naming opportunity recognition** under **Reports**.

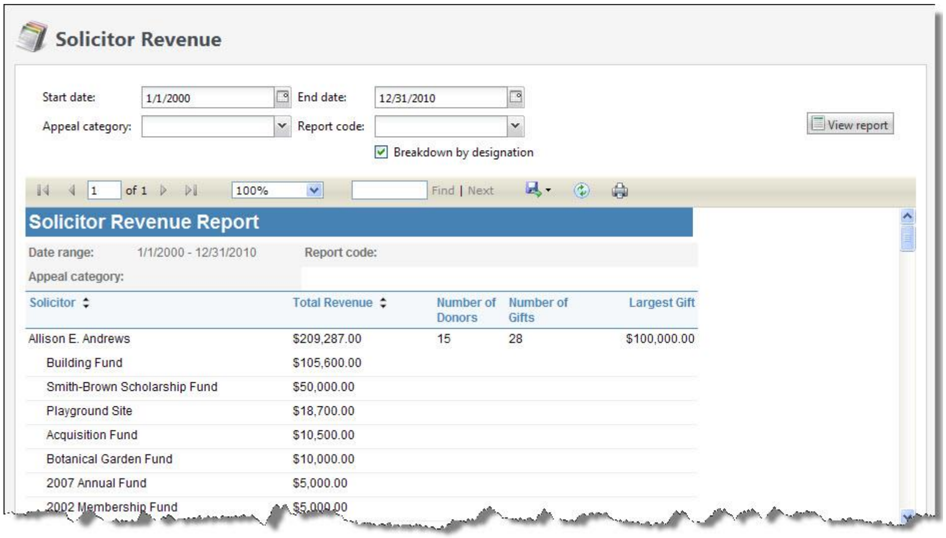
You can print the report or export it in several different formats.




# Solicitor Revenue Report

The Solicitor Revenue report enables you to see the performance of a solicitor or a group of solicitors over a specified period of time. The report includes information such as the total amount raised, the number of donors, and the largest gift. You can also see the designations for the money raised.

To run the report, from the *Fundraising* page, click **Solicitor** under **Reports**.



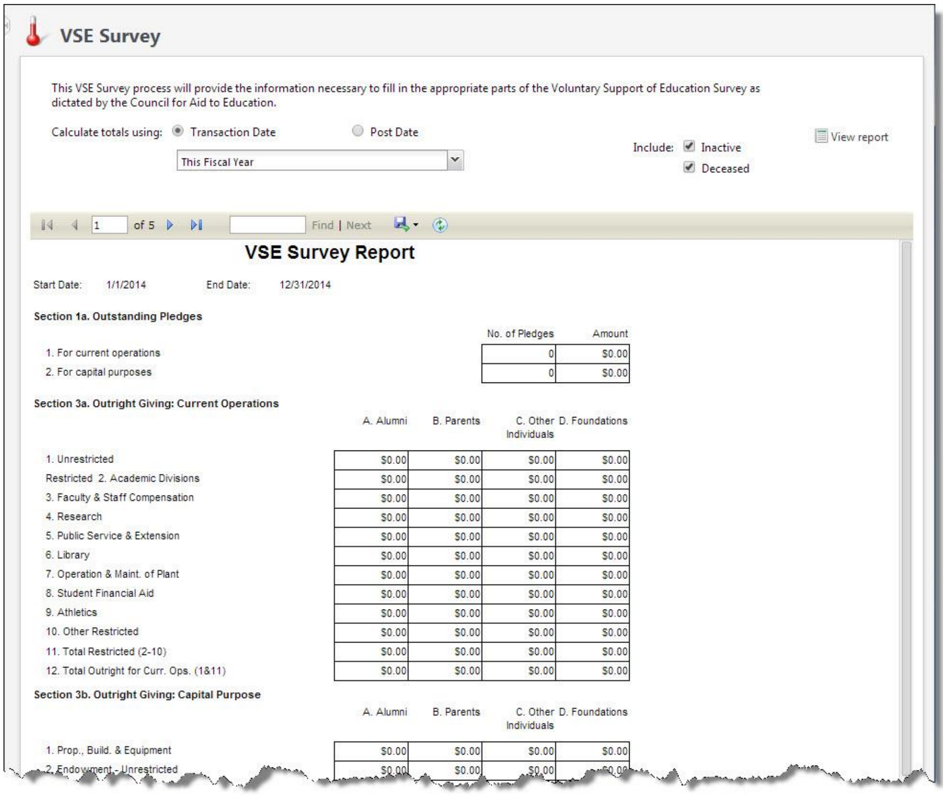

You can print the report or export it in several different formats.

# Stewardship Report

The Stewardship report is a component of the stewardship package. You can link a stewardship package to any fundraising purpose that includes donor and financial information. At regular intervals, you can run the stewardship package process to create a custom cover letter for each stewardship recipient, along with a Stewardship report. This report provides a current snapshot of a fund including the amount earned on investment, amounts distributed, contributions made to the fund, and other expenses related to fund management. You can use this report to demonstrate to fund donors and other constituents with an interest in the fundraising purpose that your organization manages contributions carefully and responsibly.

# VSE Survey Report

Colleges, universities, and private elementary and secondary schools can use the Voluntary Support of Education (VSE) Survey report to compile data, such as private gifts and grants received, to send to the Council for Aid on Education (CAE). The VSE Survey report shows information about the giving associated with the categories of the VSE Survey and is formatted to correspond directly with the survey. The report shows the quantity and total amount of outstanding pledges associated with current and capital operations, the outright giving associated with the VSE categories, and the total given to each category by constituency. The CAE uses this information to help your institution compare its data against other related organizations. Participation in the VSE Survey is voluntary.




**Note:** The constituencies and fundraising purposes associated with revenue determine to which VSE categories gifts are applied. When a fundraising purpose is added to the database, your organization can assign it to a specific VSE category. Similarly, your system administrator can map individual and organization constituencies to the constituencies of the VSE Survey in *Constituents*. For information about how to map your constituencies to the constituencies of the VSE Survey, see the *Constituents Guide*.

To access the report, on the Fundraising page, click **VSE survey** under **Reports**. The VSE Survey report screen appears. From this screen, you can select the parameters to use to generate and view the report. Once you run the report, you can print it or export its data in several different formats.

## View the Voluntary Support of Education (VSE) Survey report

The VSE Survey report does not provide all the information necessary to complete the VSE Survey. The VSE Survey report shows only information about the giving associated with the categories of the VSE Survey. For ease of use, the report is formatted to correspond directly with the survey. The reports in the VSE Survey report are consistent with the guidelines set forth in *CASE Management Reporting Standards: Standards for Annual Giving and Campaigns in Educational Fund Raising*, available from the Council for Advancement and Support of Education (CASE). For more information about CASE, visit their website at www.case.org or call them at (202) 328-2273.

1. From *Fundraising*, click **VSE survey** under **Reports**. The VSE Survey report screen appears.

**Note:** To access this report from Report explorer, select **Reports**, **Fundraising Efforts**, **VSE Survey Report**.

2. For **Calculate totals using**, select the date to use to calculate the revenue totals for the report. You can select **Transaction** or **Post Date**.

   In the adjacent field, select the date range of the revenue to include in the report. When you select "Specific Date," enter the start and end dates of the date range.
3. For **Include**, select whether to include revenue from inactive or deceased constituents in the report.
4. Click **View report**. The report appears.

# Membership Reports



Membership reports help you evaluate membership activity for your organization. You can print or export reports in several different formats, such as .xls or .pdf.

## Active Membership Report

This report provides a graphical view of the active membership count at your organization. It also provides a view of active memberships by level. The membership level data includes the specific number of memberships per level and the overall percentage of active memberships for each level.

To run the report, from a membership program, click **Active membership** under **Reports**. The Active Membership Report page appears.

You make a selection in the **Breakdown data** field to determine if the membership count is displayed in the graph as daily, weekly, monthly, or yearly data points. After you select the data and breakdown options, click **View Report**.

***Tip:*** By default, the **Breakdown data** field is set to “Monthly.”

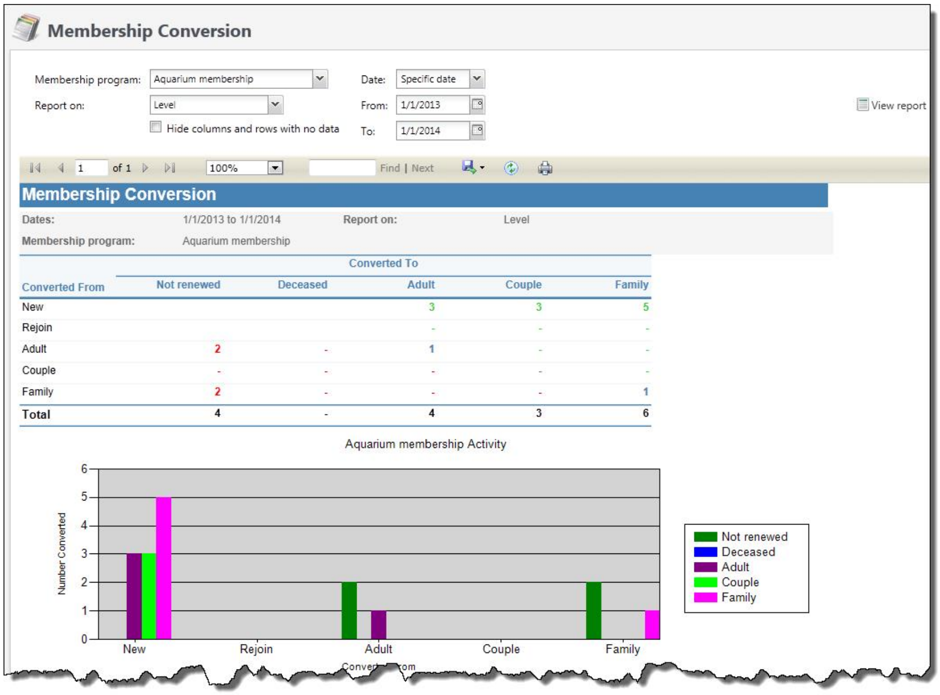
## Membership Conversion Report

Run the Membership Conversion Report to determine how effectively your organization converts low level memberships to high level memberships. This report counts the number of memberships that upgrade or downgrade from one level to another, the number of memberships that remain the same, and the number of memberships that were not renewed. It also counts new members and members who rejoin, as well as the number of members who did not rejoin because they became deceased. You can also select whether to report on membership conversion between levels or tiers. If you do not want to display membership levels or tiers with no data, you can select to hide those columns and rows.

***Note:*** A membership does not upgrade or downgrade due to a change in membership term. Therefore, memberships with only a term change are not included in the report.

To run the report, from a membership program, click **Membership conversion** under **Reports**.

***Note:*** Report results include memberships that expire or cancel during the selected date range.

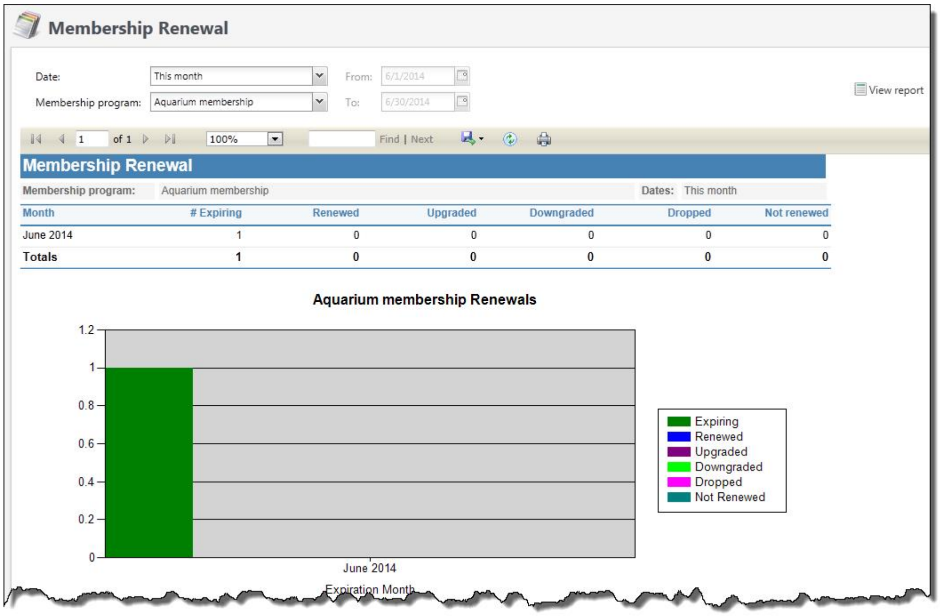



# Membership Renewal Report

Run the Membership Renewal Report to display renewal details for a membership program. For a time frame that you specify, the report lists the number of memberships to expire. It also calculates the number of renewed, upgraded, downgraded, dropped, or lapsed memberships for the program.

***Note:*** The Renewed category also includes any rejoins for the program and dates specified.

To run the report, from a membership program, click **Membership renewal** under **Reports**.

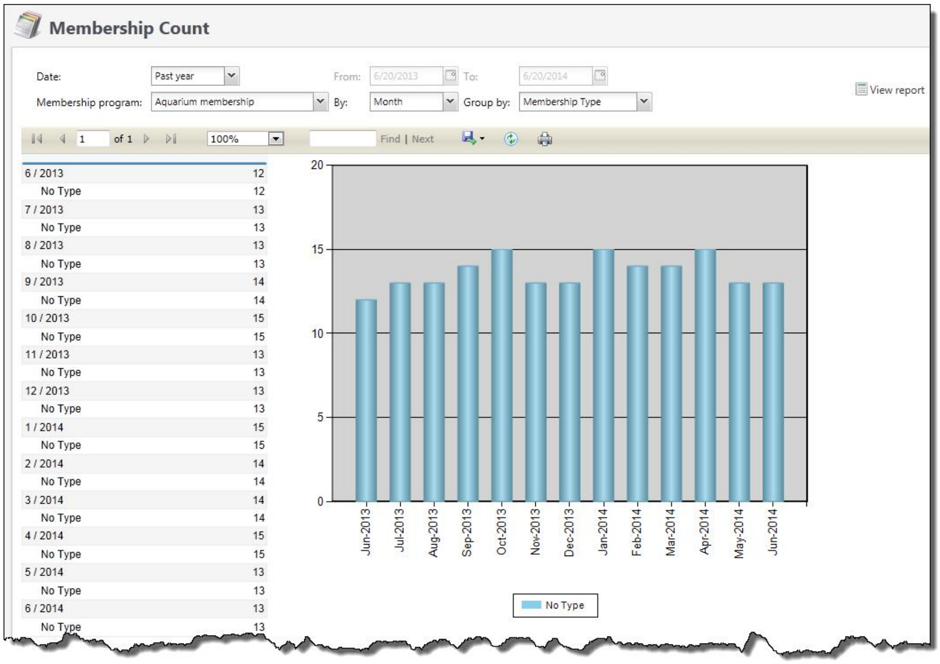



# Membership Count Report

You can use this report to view the number of active memberships for a specific month, quarter, or year grouped by membership type or level. With the date filters provided, you identify the period of time that contains the months, quarters, or years to run the report for. The report also provides several quick date options you can use to view the membership count for the past three months, past six months, or past year.

***Note:*** This report provides the number of active memberships, not members. For example, if a family membership exists with four members, that counts as one membership in this report. Additionally, the report provides the number of active memberships that exist at the end of the selected month, quarter, or year.

To run the report, from a membership program, click **Membership count** under **Reports**.




# Benefits List Report

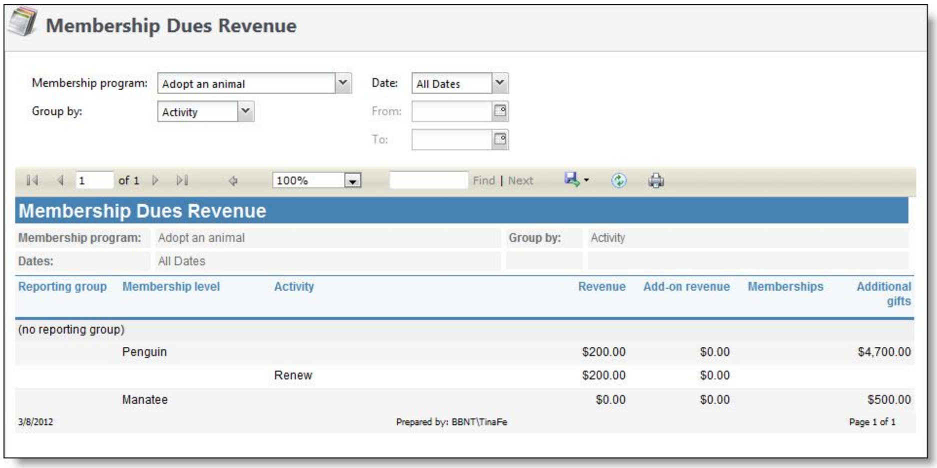
Run the Benefits List Report to create a list of constituents who have benefits from memberships, revenue, recognition programs, or events. The report lists the benefit item, along with the quantity and cost amount of the benefit.

***Warning:*** If you edit the value of a benefit in the benefits catalog, the new value does not appear on instances of the benefit already associated with an appeal, event, membership, or revenue transaction and will not be reflected in the report. To associate the new benefit value with pre-existing transactions, events, memberships, or appeals, you must update those records. For more information about the benefits catalog, refer to the *Fundraising Guide*.

To run the report, from a membership program, click **Benefits list** under **Reports**.

# Membership Dues Revenue Report

The Membership Dues Revenue Report displays revenue transaction details for a membership program in a time frame that you specify. The **Memberships** column displays the number of active memberships for the specified level, and the **Additional Gifts** column displays the amount of revenue from all gifts given by any member of the specified level.



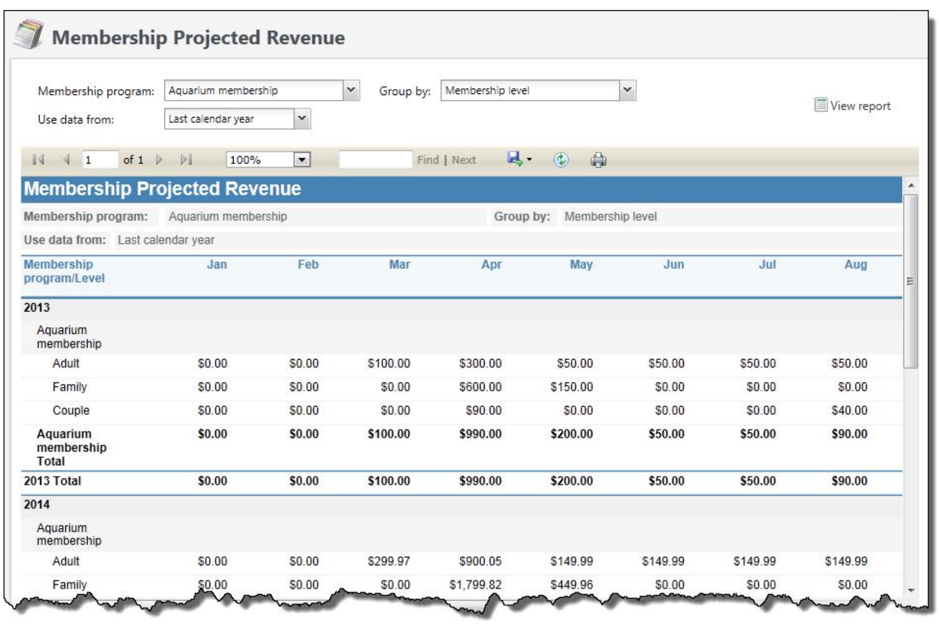

To run the report, from a membership program, click **Membership dues revenue** under **Reports**. The report appears.

# Membership Projected Revenue Report

The Membership Projected Revenue Report displays projected revenue for a membership program. The projections are based on expected revenue from membership renewals that include upgrades, downgrades, and rejoins.

The report contains a total row that calculates the sum of the projected revenue for levels in each program. It also contains a total row that calculates the sum of the projected revenue for all levels and programs in a year. The report calculations are broken out by each month in the calendar year.

To run the report, from a membership program, click **Membership projected revenue** under **Reports**.

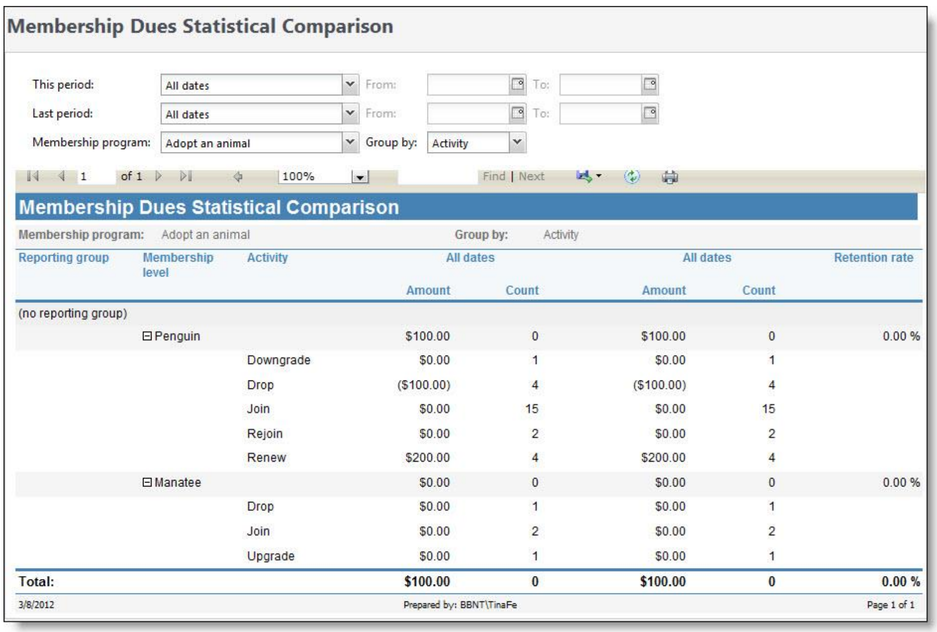


# Membership Dues Statistics Comparison Report

The Membership Dues Statistics Comparison Report compares membership data for different time periods. You select the time periods to compare and the membership program to use for the report. The report compares membership dues amount and count information for the tiers and levels in the program. You can group the report by channel or by activity. Channel displays how revenue was received such as by mail or phone. Activity displays the type of transaction, such as a join or a renew.

***Note:*** You select the channel in the **Inbound channel** field on the Add a payment screen. This field is a code table so your organization can enter the options for the field.

For reports grouped by activity, only the most recent membership transaction within the selected periods is counted in the **Totals** row. For example, if a member joins and renews within a selected period only, a single membership is counted in the total. However, a join and a renew is added to each activity sub-total for the period.




**Membership Dues Statistical Comparison**

Membership program: Adopt an animal Group by: Activity

| Reporting group | Membership level | Activity | All dates Amount | All dates Count | All dates Amount | All dates Count | Retention rate |
|---|---|---|---|---|---|---|---|
| (no reporting group) | | | | | | | |
| | ⊟ Penguin | | $100.00 | 0 | $100.00 | 0 | 0.00 % |
| | | Downgrade | $0.00 | 1 | $0.00 | 1 | |
| | | Drop | ($100.00) | 4 | ($100.00) | 4 | |
| | | Join | $0.00 | 15 | $0.00 | 15 | |
| | | Rejoin | $0.00 | 2 | $0.00 | 2 | |
| | | Renew | $200.00 | 4 | $200.00 | 4 | |
| | ⊟ Manatee | | $0.00 | 0 | $0.00 | 0 | 0.00 % |
| | | Drop | $0.00 | 1 | $0.00 | 1 | |
| | | Join | $0.00 | 2 | $0.00 | 2 | |
| | | Upgrade | $0.00 | 1 | $0.00 | 1 | |
| **Total:** | | | **$100.00** | **0** | **$100.00** | **0** | **0.00 %** |

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***Note:*** The retention rate is the percentage of existing memberships that opted to renew a membership during the renewal opportunity. Lifetime memberships and memberships that are not due for renewal are excluded from the calculation.

Reports grouped by channel behave similarly to reports grouped by activity. Only the most recent membership transaction within a selected period is counted in the total. However, cancellations are not included in any channel revenue sub-totals, since revenue is not generated by canceled memberships.

To run the report, from a membership program, click **Membership dues statistics comparison** under **Reports**.

# Membership Appeals Report

The Membership Appeals Report compares performance information about a group of membership appeals such as goals, amount raised, number of donors, number of gifts.

To run the report, from a membership program, click **Membership appeals** under **Reports**.

# Membership Activity Report

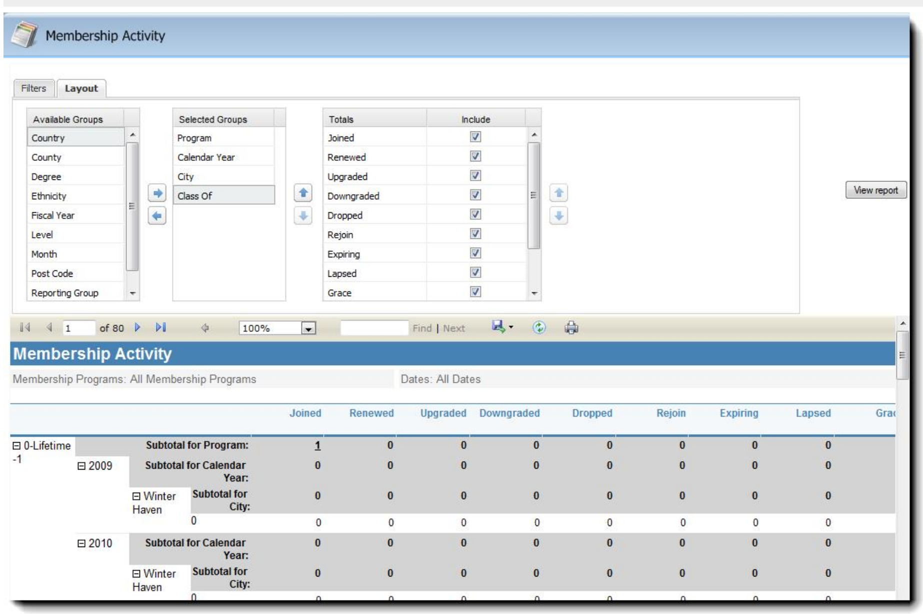
Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *Data Warehouse Guide*.

To run the report, from a membership program, click **Membership activity** under **Reports**. Select your Membership program under the Filters tab, and specify the proper dates. Click **View Report** and you will see information on amounts of members, renewals, upgrades, drops, and other membership activities. You can click on specific numbers in the report to view a breakdown of those figures.

Active memberships will include memberships that were valid at any point during the specified date range. Retention rate is calculated as the number of memberships at the end of the date range subtracted by the number of memberships that joined during the date range, subtracted by the number of memberships that rejoined during the date range, and then divided by the amount of memberships at the start of the date range.

Use the **Layout** tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click **View Report** to view the statistical breakdown.

***Note:*** Address fields (Country, State, County, City) are pulled from the primary address of primary member. Education fields (Class Of, Degree) are pulled from the primary education of the primary member.



***Note:*** You can export the report using the floppy disk icon into multiple formats, including XML, PDF, Excel, and Word.

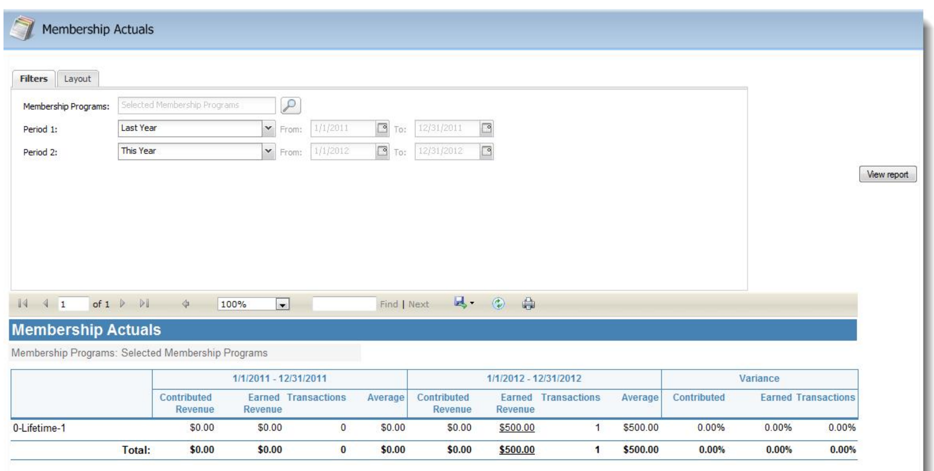
# Membership Actuals Report

This report compares contributed revenue and earned revenue in two selected time periods. You can also view the variance, or how spread out the distribution is, of contributed and earned revenue from this report. Contributed revenue includes any revenue that is associated with a contributions-based membership. Earned revenue includes any revenue that is associated with a dues-based membership.

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *Data Warehouse Guide*.

To run the report, from a membership program, click **Membership actuals** under **Reports**. Select your Membership program under the Filters tab, and specify the proper dates in the Period fields. Click **View Report** and you will see a comparison of Contributed and Earned Revenue in the two time periods. You can click on specific numbers in the report to view a breakdown of those figures.

Use the **Layout** tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click **View Report** to view the statistical breakdown.



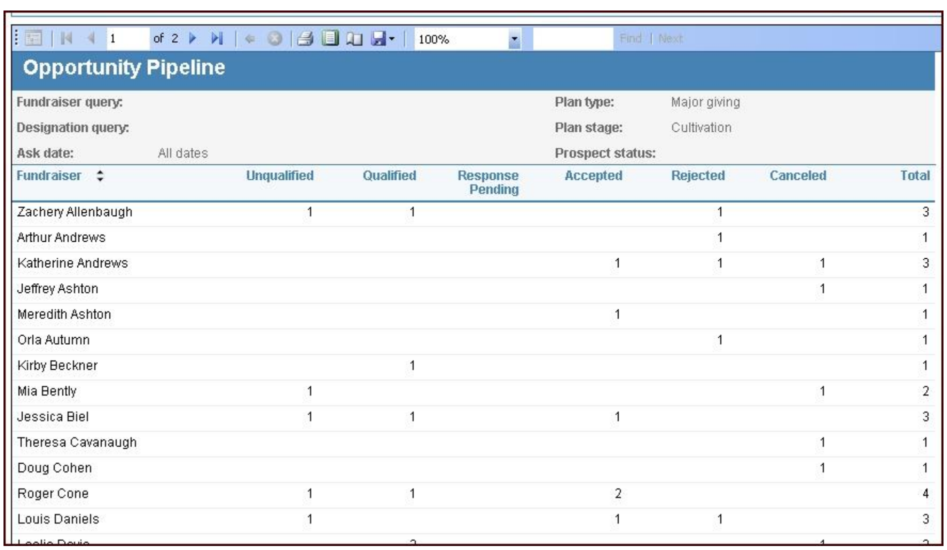
# Prospect Research Reporting



*Major Giving* includes several tracking and reporting options, enabling you to quickly and easily generate basic reports tracking a variety of major giving activities. For example, you can generate a **Prospect Plan Analysis** to review details about the various plan types included in your system, including status and ask amount information; you can generate an **Opportunity Pipeline Report** to review details about your fundraisers and ask opportunities; and much more.

## Opportunity Pipeline Report

The **Opportunity Pipeline** report helps you track all ask opportunities in your fundraiser pipeline. You can see which opportunities are Accepted, Rejected, Qualified, Unqualified, or Canceled along with the name of the fundraiser responsible for the opportunity. You can filter the report based on a fundraiser or designation query, ask date, plan type, plan stage, and prospect status.


1 of 2 100% Find | Next

Opportunity Pipeline

Fundraiser query:
Designation query:
Ask date: All dates
Plan type: Major giving
Plan stage: Cultivation
Prospect status:

| Fundraiser | Unqualified | Qualified | Response Pending | Accepted | Rejected | Canceled | Total |
|---|---|---|---|---|---|---|---|
| Zachery Allenbaugh | 1 | 1 | | | 1 | | 3 |
| Arthur Andrews | | | | | 1 | | 1 |
| Katherine Andrews | | | | 1 | 1 | 1 | 3 |
| Jeffrey Ashton | | | | | | 1 | 1 |
| Meredith Ashton | | | | 1 | | | 1 |
| Orla Autumn | | | | | 1 | | 1 |
| Kirby Beckner | | 1 | | | | | 1 |
| Mia Bently | 1 | | | | | 1 | 2 |
| Jessica Biel | 1 | 1 | | 1 | | | 3 |
| Theresa Cavanaugh | | | | | | 1 | 1 |
| Doug Cohen | | | | | | 1 | 1 |
| Roger Cone | 1 | 1 | | 2 | | | 4 |
| Louis Daniels | 1 | | | 1 | 1 | | 3 |

### Generate an Opportunity Pipeline Report

1. From the Major Giving page, under **Reports**, select **Opportunity pipeline report**. The Opportunity Pipeline Report screen appears.

***Note:*** You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Opportunity pipeline** from the menu.

2. In the **Fundraiser query** field, click the binoculars. The Search screen appears so you can search for the selection of fundraisers to include in the report. Once you select the selection, you return to the Opportunity Pipeline Report screen. The report will include information about only fundraisers included in the selected selection. To include all fundraiser in your report, leave this field blank.

***Note:*** For information about creating queries and selections, see the Query chapter of the *Query and Export Guide*.

3. In the **Designation query** field, you can select a query of designations on which to base your report. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the designation query. Once located, select the query in the **Results** grid and click **Select**. You return to the Opportunity Pipeline Report screen. The report will include information about only the selected designations. To include information about all designations, leave this field blank.
4. In the **Ask date** field, select the ask date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select "This year".

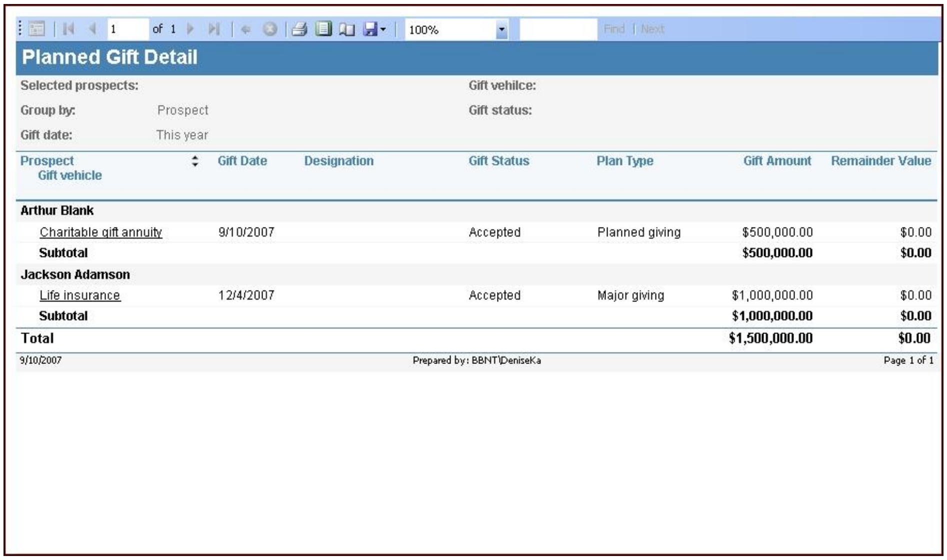
   If you select "Specific date," you can select a start date and an end date in the date fields to report on a specific date range.
5. In the **Plan stage** field, select the stage on which you want to base your report: Cultivation, Solicitation, Stewardship. Leave the field blank to include all plan stage options.
6. In the **Plan type** field, select the plan on which you want to base your report: Major Giving, Planned Giving, Foundation Giving. Leave the field blank to include all plan type options.
7. In the **Prospect status** field, select the status on which you want to base your report: Assigned, Identified, Qualified. Leave the field blank to include all status options.
8. Select an **Opportunity status**: Unqualified, Qualified, Response Pending, Accepted, Rejected, Canceled. You must select an opportunity status.
9. Click **Refresh** to generate your report.

***Note:*** After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message "Report processing was canceled" appears. For information about all buttons included in the report, see the *General Features Guide*.

# Planned Gift Detail Report

The **Planned Gift Detail** Report helps you track planned gifts in your system. You can filter the report based on the gift status, gift vehicle, and gift date. You can also select which prospects to include in the report and how you want information grouped.

***Note:*** If a planned gift has additions, the main planned gift is displayed. The gift date is the date of the original planned gift and the amount is the total of the original planned gift plus any additions.



Planned Gift Detail

Selected prospects:

Gift vehilce:

Group by: Prospect

Gift status:

Gift date: This year

| Prospect / Gift vehicle | Gift Date | Designation | Gift Status | Plan Type | Gift Amount | Remainder Value |
|---|---|---|---|---|---|---|
| **Arthur Blank** | | | | | | |
| Charitable gift annuity | 9/10/2007 | | Accepted | Planned giving | $500,000.00 | $0.00 |
| **Subtotal** | | | | | **$500,000.00** | **$0.00** |
| **Jackson Adamson** | | | | | | |
| Life insurance | 12/4/2007 | | Accepted | Major giving | $1,000,000.00 | $0.00 |
| **Subtotal** | | | | | **$1,000,000.00** | **$0.00** |
| **Total** | | | | | **$1,500,000.00** | **$0.00** |

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## Generate a Plan Gift Detail Report

1. From the Major Giving page, under **Reports**, select **Planned gift detail**. The Planned Gift Detail screen appears.

***Note:*** You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Planned gift detail report** from the menu.

2. In the **Selected planned gifts** field, click the binoculars. A search screen appears, and you can search for the selection you want to include in the report. Once you select the selection, you return to the Planned Gift Detail screen. The report will include information about only planned gifts included in the selected query. To include all planned gifts in your report, leave this field blank.

   For information about creating a selection, see the Query chapter of the *Query and Export Guide*.

3. In the **Gift vehicle** field, select the gift vehicle on which you want to base your report: Life Insurance, Charitable gift annuity, Pooled income fund. Leave the field blank to include all vehicle options.
4. In the **Gift status** field, select the status on which you want to base your report: Proposal, Accepted, Rejected. Leave the field blank to include all status options.
5. In the **Group by** field, select the method by which you want information included in the report grouped: Prospect, Gift vehicle, Gift status. You must select a grouping option.
6. In the **Gift date** field, select the date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year”.

If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.

7. In the **Include data for associated households**, you can select:

***Note:*** These checkboxes appear only when "Prospect" is selected in **Group by parameter**.

- **Show member data for each household** to base your report on the household
- **Show household data for each member** to base your report on each member of the household

8. Click **Refresh** to generate your report.

***Note:*** After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

# Prospect Plan Analysis

The **Prospect Plan Analysis** provides details about selected or all plan types in your system. You can base the report on selected prospects or all prospects and filter on a variety of options: prospect status, opportunity status, plan type, plan stage, and dates. You can even select how you want information grouped.

**Prospect Plan Analysis**

| | | | | | |
|---|---|---|---|---|---|
| Selected prospects: | | Plan type: | | Group by: | Prospect Manager |
| Prospect status: | | Plan stage: | | Date range: | This year |
| Opportunity status: | | Include inactive plans: | No | Date to use: | Ask date |

| Prospect Manager / Prospect | Plan Type | Opportunity Status | Ask Amount | Response Amount | Difference | Ask Date | Response Date | Days Open |
|---|---|---|---|---|---|---|---|---|
| Gretta Yang | | | | | | | | |
| Florian Daniels | Major giving | Canceled | $315,369.12 | $0.00 | $315,369.12 | 9/7/2007 | 9/14/2007 | 7 |
| Benjiman Davenport | Major giving | Rejected | $136,996.59 | $0.00 | $136,996.59 | 8/25/2007 | 9/1/2007 | 7 |
| Willa Graack | Major giving | Qualified | $125,906.85 | $0.00 | $125,906.85 | 9/12/2007 | 9/19/2007 | 7 |
| George Payne | Major giving | Response Pending | $1,122.14 | $0.00 | $1,122.14 | 7/29/2007 | 8/5/2007 | 7 |
| **Sub total** | | | **$579,394.70** | **$0.00** | **$579,394.70** | | | |
| Dianne Wilson | | | | | | | | |
| Andrea Avdeenko | Planned giving | Qualified | $12,617.19 | $0.00 | $12,617.19 | 8/3/2007 | 8/10/2007 | 7 |
| Elizabeth Baker | Major giving | Response Pending | $1,083.16 | $0.00 | $1,083.16 | 10/6/2007 | 10/13/2007 | 7 |
| George Daly | Major giving | Accepted | $1,039.35 | $1,039.35 | $0.00 | 7/29/2007 | 8/5/2007 | 7 |
| Gretta Ferber | Major giving | Qualified | $1,544.34 | $0.00 | $1,544.34 | 8/31/2007 | 9/7/2007 | 7 |
| Anthony Jacobson | Major giving | Unqualified | $16,719.67 | $0.00 | $16,719.67 | 9/6/2007 | 9/13/2007 | 7 |
| Isabelle Simpson | Major giving | Qualified | $1,086.92 | $0.00 | $1,086.92 | 8/2/2007 | 8/9/2007 | 7 |
| Clarice Smith | Major giving | Rejected | $6,302.77 | $0.00 | $6,302.77 | 8/25/2007 | 9/1/2007 | 7 |
| Frederick Taylor | Major giving | Response Pending | $22,797.49 | $0.00 | $22,797.49 | 9/23/2007 | 9/30/2007 | 7 |

## Generate a Prospect Plan Analysis

1. From the Major Giving page, under **Reports**, select **Prospect Plan Analysis**. The Prospect Plan Analysis screen appears.

***Note:*** You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Prospect Plan Analysis** from the menu.

2. In the **Selected prospects** field, click the binoculars. A search screen appears, and you can search for the prospect selection you want to include in the report. Once you select the

selection, you return to the Prospect Plan Analysis screen. The report will include information about only prospects included in the selected query. To include all prospects in your report, leave this field blank.

For information about creating a selection, see the Query chapter of the *Query and Export Guide*.

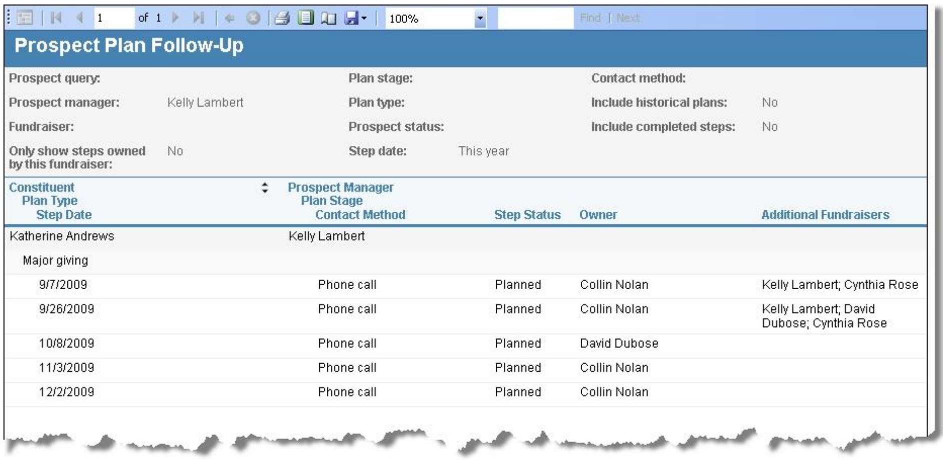
3. In the **Prospect status** field, select the status on which you want to base your report: Assigned, Identified, Qualified. Leave the field blank to include all status options.
4. In the **Opportunity status** field, select the status on which you want to base your report: Qualified, Unqualified, Response pending. Leave the field blank to include all status options.
5. In the **Plan type** field, select the plan on which you want to base your report: Major Giving, Planned Giving, Foundation Giving. Leave the field blank to include all plan type options.
6. In the **Plan stage** field, select the stage on which you want to base your report: Cultivation, Solicitation, Stewardship. Leave the field blank to include all plan stage options.
7. In the **Group by** field, select the method by which you want information included in the report grouped: Primary manager, Secondary manager, Plan stage. You must select a grouping option.
8. In the **Date to use** field, select the plan date on which you want to base your report: Ask date or Response date. You must select a **Date to use** option.
9. In the **Dates** field, select the date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year”.

   If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.
10. Mark the **Include historical plans** checkbox to include plans designated as “Historical” on the prospect. Do not mark this checkbox if you wish to not include historical plans.
11. Click **Refresh** to generate your report.

***Note:*** After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

# Prospect Plan Follow-Up Report

The **Prospect Plan Follow-up report** helps you track planned, pending, or completed steps for selected prospects. You can view steps for a specific plan stage or type, and limit the results to a certain contact method or fundraiser assigned to the step. With this report, you can easily determine the status of all or selected prospect plan steps.




## Generate a Prospect plan follow-up report

1. From the Major Giving page, under **Reports**, select **Prospect plan follow-up**. The Prospect Plan Follow-Up screen appears.
2. In the **Prospect query** field, click the binoculars. A search screen appears, and you can search for the selection of prospects to include in the report. Once you select the selection, you return to the Prospect Plan Follow-Up screen. The report will include information about only prospects included in the selected query. To include all prospects in your report, leave this field blank.

***Note:*** For information about creating queries and selections, see the Query chapter of the *Query and Export Guide*.

3. In the **Prospect status** field, select the status on which you want to base your report. Leave the field blank to include all status options.
4. In the **Prospect manager** field, you can select a prospect manager on which to base your report. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the prospect manager. Once located, select the manager in the **Results** grid and click **Select**. You return to the Prospect Plan Follow-Up screen. The report will include information about only the selected prospect manager. To include information about all prospect managers, leave this field blank.
5. In the **Plan stage** field, select the stage on which you want to base your report. Leave the field blank to include all plan stage options.
6. In the **Plan type** field, select the plan on which you want to base your report. Leave the field blank to include all plan type options.
7. Select **Include historical plans** to include plans designated as “Historical” on the prospect. Do not mark this checkbox if you wish to not include historical plans.
8. In the **Fundraiser** field, you can select to limit the report results to a fundraiser who is either the step owner or who appears as an additional solicitor on the plan step. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the fundraiser. Once located, select the fundraiser in the **Results** grid and click **Select**. You return to the

Prospect Plan Follow-Up screen. The report will include information about only the selected fundraiser. To include information about all fundraisers in your report, leave this field blank.

9. Select **Only show steps owned by this fundraiser** to display only plan steps the fundraiser owns. To also include steps on which the fundraiser is an additional solicitor, clear this checkbox.
10. In the **Contact method** field, select the contact method on which you want information included in the report based, such as a meeting, phone call, or mailing. Leave the field blank to include all contact methods.
11. In the **Step date** field, select the step date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year.”

    If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.
12. Select the **Include completed steps** checkbox to include steps marked as “Completed” in the plan. Clear this checkbox to include only planned and pending steps in the report.
13. Click **Refresh** to generate your report.

***Note:*** After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

# Revenue Reports



Revenue reports help you evaluate the financial position of your organization. The multiple report types included in this category provide several ways to view revenue information. You can view summary reports for all revenue, or you can view information for specific revenue types, such as pledges or recurring gifts. You can view the breakdown of your General ledger accounts, and information about posted revenue and adjusted revenue.

Many revenue reports use queries in order to select specific records to include in the report. For more information about queries, refer to the *Query and Export Guide*.

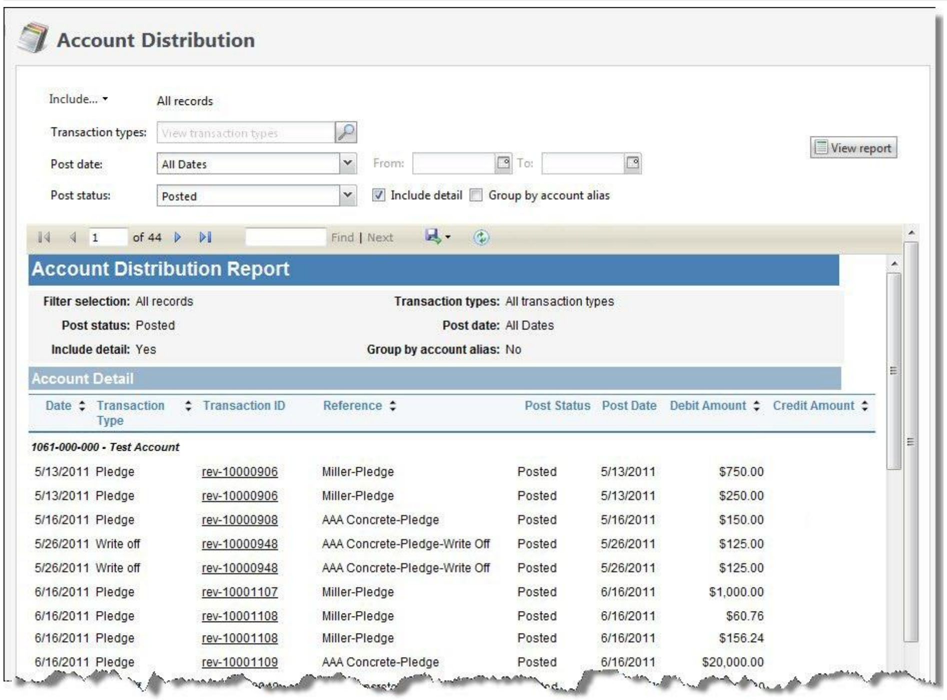
When you generate a report, you can use the toolbar buttons to modify how you view the report. The toolbar buttons are common to all reports.

For more information about the report toolbar, refer to the *General Features Guide*.

# Account Distribution Report

The Account Distribution Report provides a breakdown by General ledger accounts of transactions during the time period you select. The data included depends on the parameters you select.

***Note:*** Transactions with a post status of "Do not post" do not generate General ledger distributions and are excluded from the Account Distribution Report.




## View the Account Distribution report

1. From *Revenue*, click **Account distribution** under **Reports**. Or, from *Analysis*, click **Revenue reports** and then **Account distribution**. The Account Distribution report page appears.
2. In the **Account system** field, select the account system for the transactions you want to view. This field only appears if your organization configures multiple General ledger account systems and implements site security, and you have rights to work with multiple account systems.

3. To select the GL accounts to include, click **Include** and select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears, search for GL accounts to include in the report.
4. To select the transaction types to include, click the search button in the **Transaction types** field. The Transaction types screen appears where you can select one or more transaction types. When you select transactions types, you limit the report results to only the transaction types you select. By default, all transaction types are included unless you use this filter.

   From this screen, you can click **Select all** to choose all transaction types and **Deselect all** to include none. Examples of transaction types include pledges, refunds, and payments.
5. In the **Post date** field. select a specific time period of post dates to include. If you select "Specific Date," the **From** and **To** fields appear where you can enter a specific period of time.
6. In the **Post status**, select the post status of the transactions to include. You can include posted or not posted transactions, or both.

***Note:*** Transactions with a post status of "Do not post" do not generate General ledger distributions and are excluded from the Account Distribution Report.

7. To display the report in both summary and detail format, select **Include detail**. To view the report in summary format only, do not select **Include detail**.

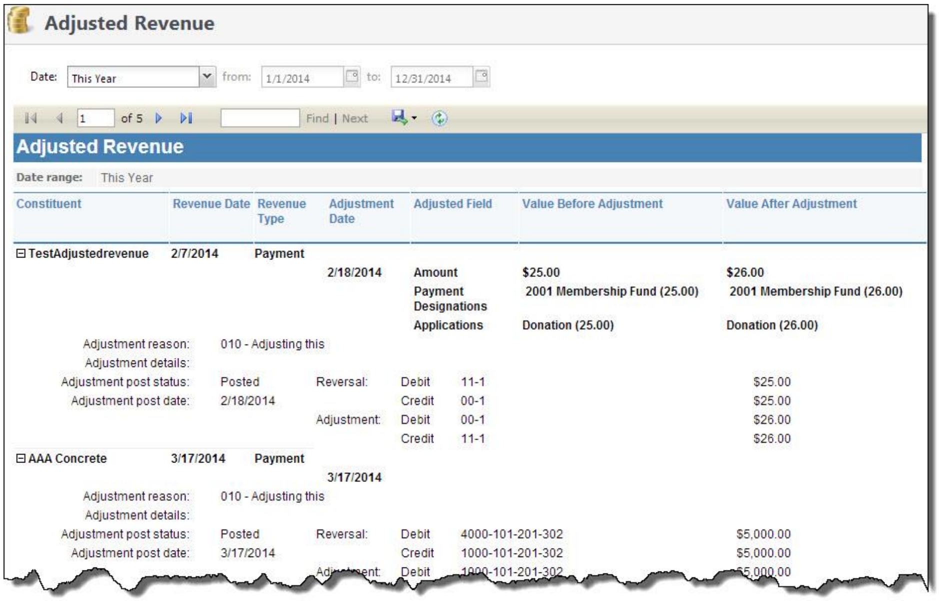
***Warning:*** If you filter the report using a small amount of criteria or no criteria at all, and you select to view the report in detail, a message may appear alerting you that results exceed the capacity of the report. In this case, we recommend you filter by smaller segments of activity, such as post date, specific accounts, or specific transaction types.

8. To group the report by account alias, select **Group by account alias**. If you do not select this option, the report is grouped by GL account.
9. With *Multicurrency*, the **Currency** field appears. Use this field to determine how you want to view transaction amounts in the report.

   "Base" is the base currency of the associated account system. "Organization" is the organization currency, and "Transaction" is the revenue's transaction currency. When you add revenue, the program calculates and stores the base currency and organization currency amounts, along with the original transaction currency amount. When you switch currencies on the report, the amounts displayed are the original currency amounts calculated when the transactions were added.
10. Click **View Report**.

# Adjusted Revenue Report

After you post revenue to the General ledger, you can still edit information about the revenue. If the change impacts the General ledger, the program automatically creates an adjustment transaction to reflect the change in General ledger. To view a general summary of the adjustments made to revenue after it posts to the General ledger, such as changes to the revenue amount or its designations, you can view the Adjusted Revenue report.




***Note:*** To view the adjustment history of a specific revenue record, access the revenue history. The Revenue History page displays a general summary of the adjustments made to revenue after it posts to the General ledger.

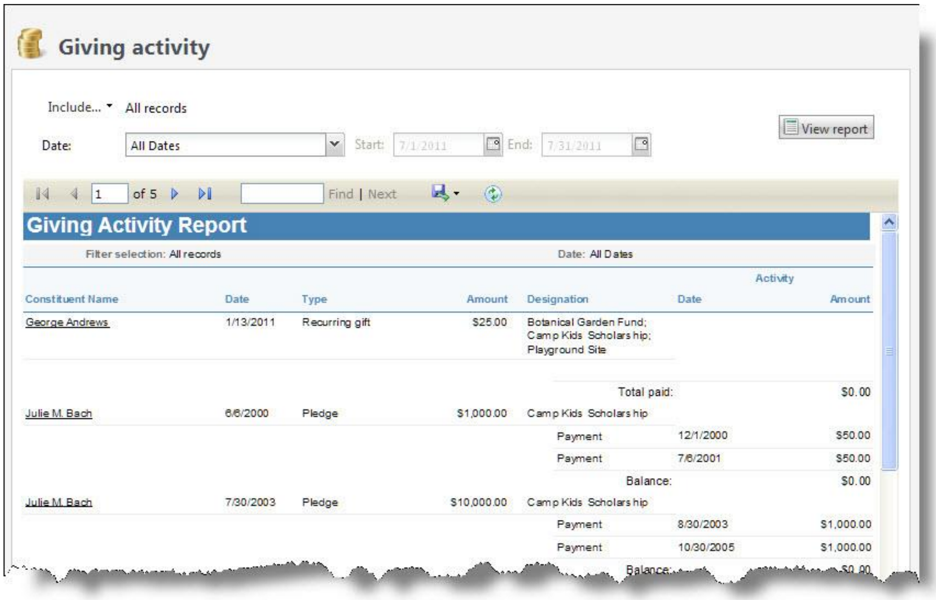
The Adjusted Revenue report provides information about the adjustments made to all posted revenue during a specified period of time. The report displays the constituent, type, and date associated with the posted revenue and adjustments made, including the date of the adjustment, the field adjusted, and the field value before and after the adjustment.

### View the Adjusted Revenue report

1. From *Revenue*, click **Adjusted revenue** under **Reports**. The Adjusted Revenue screen appears.
2. In the **Date** field, select the date range for which to view adjustment activity.
   a. In the **from** field, click the calendar and select the earliest adjustment date to view. The report will display adjustment activity on or after this date.
   b. In the **to** field, click the calendar and select the latest adjustment date to view. The report will display all adjustment activity between the **from** date and this date.
3. Click **View Report**. The program generates and displays the report.

# Giving Activity Report

The Giving Activity Report provides a detailed account of all pledge and recurring gift activity, including payments, installments, and balances due, during the time period you define. Grant awards, matching gifts, recurring gifts applied to memberships, and donor challenges are also included. You can limit the report to specific pledges, such as outstanding pledges and recurring gifts. This report shows only activity that occurs during the selected time period; it does not list pledges with no activity in the time period. The data included depends on the parameters you select.




***Note:*** If your organization uses site security, the amounts that appear in the Activity report include only revenue associated with the sites the user who generates the report has rights to access.

### View the Activity report

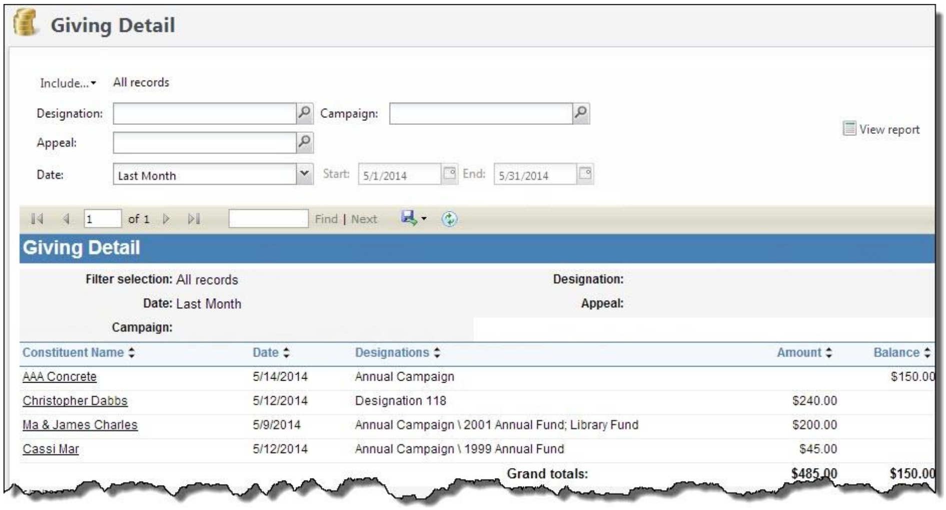
1. From *Revenue*, click **Activity** under **Reports**. The Activity Report screen appears.
2. To select the revenue transactions to include, click **Include** and select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears, search for the records to include in the report.
3. Enter the date range for which to view activity.
   - In the **Date** field, select a date for which to view activity.
   - In the **from** and **to** fields, use the calendars to select a date range for which to view activity. The report displays all activity only for the date or date range you select.
4. Click **View Report**. The program generates and displays the report.

# Giving Detail Report

The Giving Detail report provides information about constituent giving during a time period you define. The report includes totals of revenue received within the date range for each designation, as well as constituent name and address information. The data included in the report depends on the parameters you select.

The report counts payments made towards a designation, such as donations and pledge and recurring gift payments, in the **Amount** column and any outstanding commitments, such as pledge balances or matching gift claims, in the **Balance** column.

***Note:*** Recurring gift balances are not included in the **Balance** column.




***Note:*** If your organization uses site security, the amounts that appear in the Giving Detail report include only revenue associated with the sites the user who generates the report has rights to access.

## View the Giving Detail report

1. From *Revenue*, click **Giving detail** under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Giving detail**. The Giving Detail screen appears.
2. Click **Include** and select the records to include. Select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears, search for the records to include in the report.
3. Enter the date range for which to view detailed revenue information.
   - In the **Date** field, select a date for which to view detailed revenue information.
   - In the **from** and **to** fields, use the calendars to select a date range for which to view activity. The report displays activity only for the date or date range you select.
4. To include revenue for a specific designation only, in the **Designation** field, click the magnifying glass to search for and select a designation, for example, "Library."

   If the revenue is split between the designation you selected and another designation, the report includes the full amount of the revenue, but lists all designations to which the revenue is applied.
5. To include revenue for a specific appeal only, in the **Appeal** field, click the magnifying glass to search for and select an appeal, for example, "Walk-A-Thon."
6. To include revenue for a specific campaign only, in the **Campaign** field, click the magnifying glass to search for and select a campaign, for example, "Annual Campaign."

***Note:*** To filter your report further, you can use criteria such as appeal and designation. Be careful not to narrow your criteria too much or the report will not return any results.

7. Click **View Report**. The program generates and displays the report.

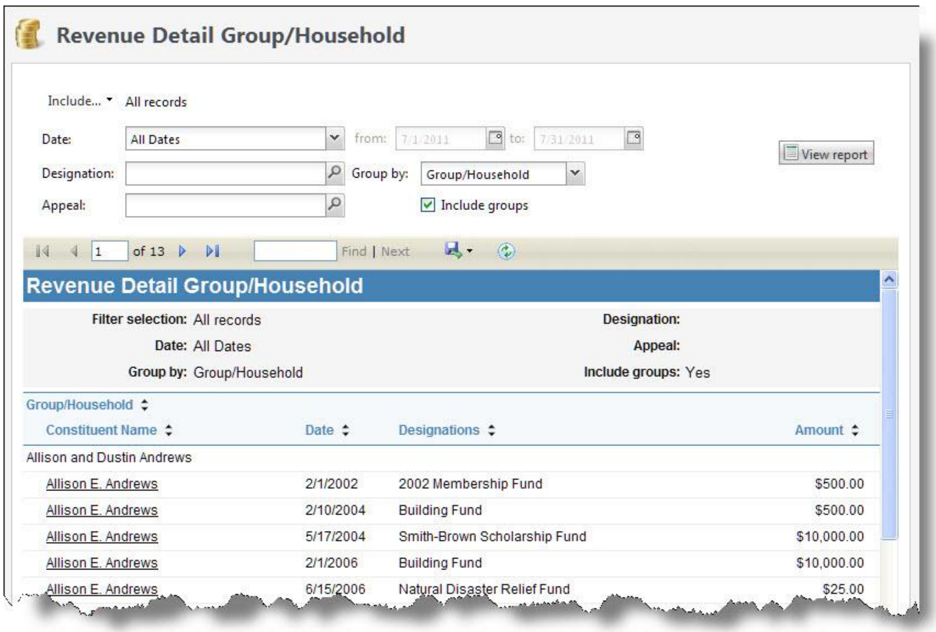
# Giving Detail Group/Household Report

The Giving Detail Group/Household report provides information about individual group or household member giving during a time period you define. The report includes totals of revenue received within the date range for each designation, as well as constituent name and group/household information. The data included in the report depends on the parameters you select.

The report counts payments made towards a designation, such as donations and pledge and recurring gift payments, in the **Amount** column and any outstanding commitments, such as pledge balances, in the **Balance** column.

***Note:*** Recurring gift balances are not included in the **Balance** column.

***Tip:*** The Revenue Detail Group/Household report displays member giving for a constituent group only when the constituent group type is configured to include member giving.




***Note:*** If your organization uses site security, the amounts that appear in the Giving Detail Group/Household report include only revenue associated with the sites the user who generates the report has rights to access.

## View the Giving Detail Group/Household report

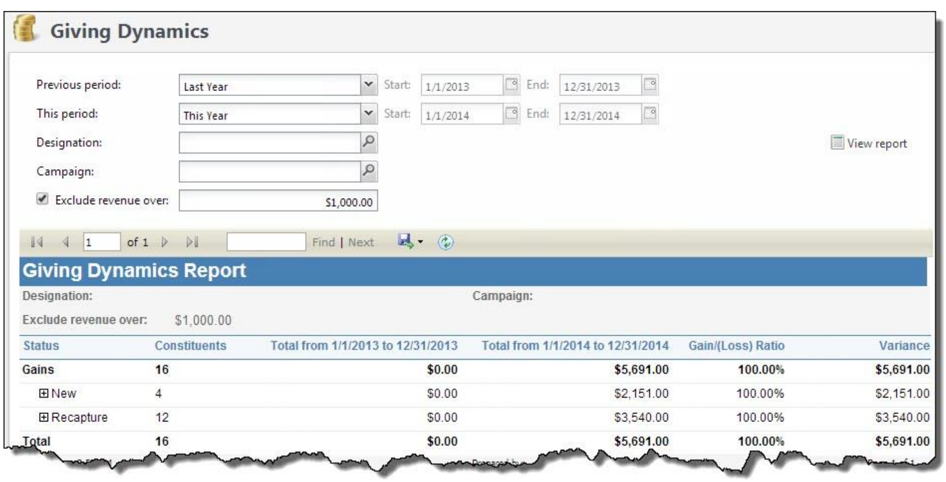
1. From *Revenue*, click **Giving detail group/household** under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Giving detail group/household report**. The Giving Detail Group/Household Report screen appears.
2. Click **Include** and select the records to include. Select “All records,” “Selected records,” or “Specific record.” If you select “Selected records” or “Specific record,” in the field that appears, search for the revenue transaction records to include in the report.

3. Enter the date range to filter the report.
   - In the **Date** field, select a date for which to view revenue detail information for groups or households.
   - If, in the **Date** field, you select “Specific date,” in the next field, click the calendar and select the date for which to view revenue detail information for groups or households. The report will display information only for the date you select.
4. Select any filters you want for the **Designation** and **Appeal** fields.
5. In the **Group by** field, you can select how to display the report. To group the results by group or household, select “Group/Household.” To displays the results alphabetically by individual constituent, leave this field blank.
6. By default, the report includes revenue information for households only. To include revenue information for groups as well, select **Include groups**. If the revenue is associated with a constituent who is a member of both a group and a household, the revenue appears twice in the report, once as household revenue, and once as group revenue.
7. Click **View Report**. The program generates and displays the report.

# Giving Dynamics Report

The Giving Dynamics report provides a comparison of gift revenue activity for two periods of time. For example, you can generate a Giving Dynamics report to compare the activity of two fiscal years.

You can run the report to include gift revenue transactions during the selected time periods or only those made toward a specific designation or campaign. By default, the report includes all pledges and payments toward a donation or recurring gift that meet the selected criteria.




***Tip:*** For the most meaningful data, we recommend you use the Giving Dynamics report to compare the activity of two contiguous time periods, such as the first and second quarters of a fiscal year or "Last year" and "This year."

When you run the Giving Dynamics report, the program compares the revenue activity that meet the selected criteria during the selected time periods to calculate the total for each period and the variance. To help determine the effectiveness of your fundraising efforts, the report also breaks down the revenue activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

- **New** — Constituents with a revenue transaction during the later period, but not prior to the later period.
- **Recapture** — Constituents with a revenue transaction during the later period and prior to, but not during, the earlier period.
- **Upgrade** — Constituents with revenue transactions during both periods, but with a larger revenue amount during the later period than the earlier period.
- **Downgrade** — Constituents with revenue transactions during both periods, but with a larger revenue amount during the earlier period than the later period.
- **Lapsed new** — Constituents with a revenue transaction during the earlier period, but not prior to the earlier period nor during the later period.
- **Lapsed repeat** — Constituents with a revenue transaction during and prior to the earlier period, but not during the later period.
- **Same** — Constituents with revenue transactions during both periods, with an equal revenue amount during each period.

To view the constituents included in a specific status of the report, click the plus sign (+) next to the status to view. For example, to view the constituents with a status of "New" and their revenue amounts included in the report, click the plus sign next to **New**. To access the record of a constituent included in a status, click the constituent’s name in the list that appears.

***Tip:*** You can create a Giving Dynamics smart query to create a constituent selection based on the same criteria as the Giving Dynamics report. For example, you can create a selection of the constituents with a status of "Downgrade," "Lapsed new," and "Lapsed repeat" for use in a mailing to encourage increased giving. To access this smart query from the Giving Dynamics report, click **Giving Dynamics smart query** under **Tasks**. For information about how to create a smart query, see the *Query and Export Guide*.

When you generate a report, you can use the toolbar buttons to modify how you view the report. The toolbar buttons are common to all reports.

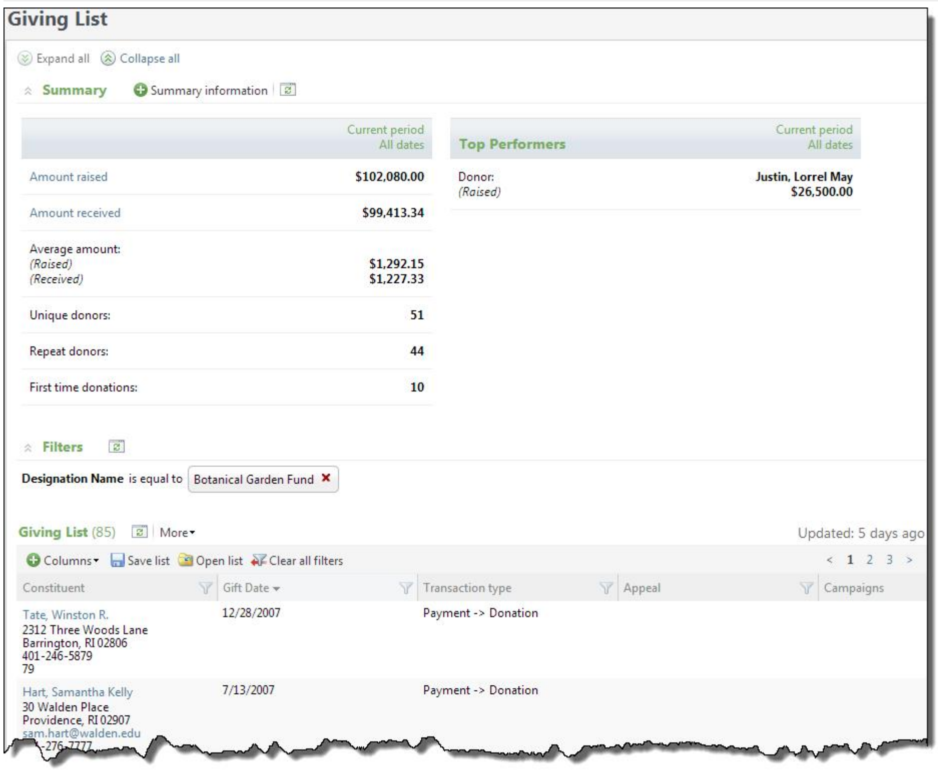
## View the Giving Dynamics report

1. From *Revenue*, click **Giving dynamics**under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Giving dynamics**. The Giving Dynamics Report page appears.
2. In the **Previous period dates** field, select the earlier time period to include in the comparison, such as Last Year. If you select Specific Date, enter the start and ends of the time period.
3. In the **This period dates** field, select the later time period to include in the comparison, such as This Year. If you select Specific Date, enter the start and ends of the time period.
4. To include only revenue transactions toward a specific designation in the comparison, in the **Designation** field, search for and select the designation to use.
5. To include only revenue transactions toward a specific campaign in the comparison, in the **Campaign** field, search for and select the campaign to use.

6. To include only revenue transactions under a specific amount, select **Exclude revenue over** and enter the maximum revenue amount of the transactions to include.
7. Click **View Report**. The program generates and displays the report.
8. To close the report and return to the previous page, click **Back**.

# Giving List Report

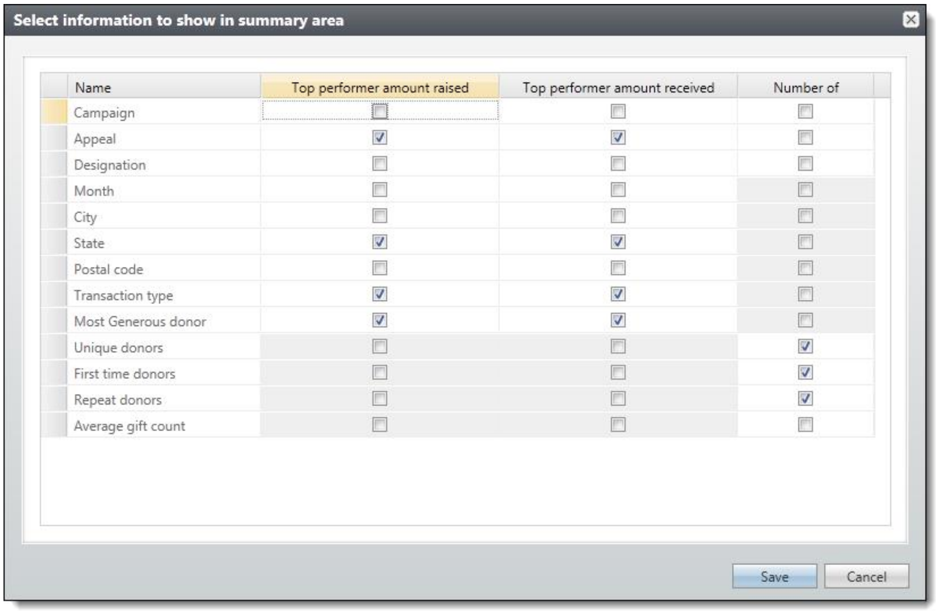
***Note:*** Before you run this report, a system administrator must install and configure the data warehouse. The data warehouse places records from your source database in a data warehouse so you can conduct complex reporting and analysis faster and more efficiently. For information about data warehouse, refer to the *Data Warehouse and OLAP Guide*.




The Giving List is a flexible tool that allows you to view revenue and other related information in many different ways to best suit your needs.

- As a major gift officer, I want to view gifts over a certain amount from this week.
- As a campaign manager, I want to find out how much money has been raised for one or more specific campaigns (or appeals or funds) to gauge whether we are on track to meet our goals.
- My organization wants to treat commitments and payments slightly differently. For example, we want to view pledges but not pledge payments, but when it comes to event revenue, we want to view only the event registration payments and not event registrations that have yet to be paid.
- I want to view the gifts and total gift amounts brought in by each prospect manager or solicitor.

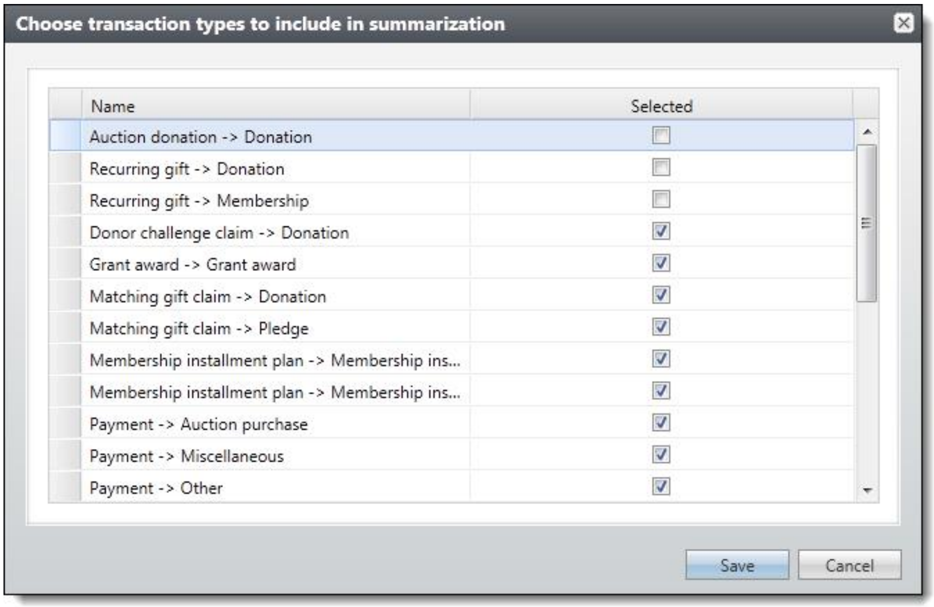
At the top of the Giving List report, a Summary section displays. You can click **Summary information** to select the information to include, such as the top performers by campaign, month, or city. Top performers can be listed by amount raised or amount received.




- **Amount raised** includes outstanding commitments even if there is no payment, such as a pledge with no pledge payments. The single, next installment of a recurring gift is included in the amount raised.
- **Amount received** includes only revenue payments received and not outstanding commitments. Only recurring gift payments, and not the next installment amounts, are included in the amount received.

***Note:*** The number of unique donors, first time donors, and repeat donors includes only actual revenue and not recognition credit.

Also in the Summary section, you can click **Amount raised** and **Amount received** to configure each option to include different types of commitments and payments. Only the transaction types selected will be included in the calculations for amount raised and received, and only those transaction types will be included in the Summary section of the Giving List report. The **Amount raised** and **Amount received** calculations are usually set for your organization by your system administrator. You can still click **Amount raised** and **Amount received** to view which commitments and payments are included.




***Warning:*** With the **Amount raised** and **Amount received** filters in the Summary section of the report, you select the types of commitments and payments to include in the calculations. Therefore, it is possible to select commitments (such as pledges) and payments toward the commitments (such as pledge payments) for the calculation. This essentially counts the same revenue twice. To avoid double counting the revenue, we strongly recommend you include either the commitments or the payments for the commitments, but not both.

Below the Summary section is the actual Giving List. This list includes all transactions according to the filters set on the list itself, not the settings selected in the Summary section. For example, you can filter the Giving List by constituent or date to get different views. You can add columns to have more filtering options, such as by prospect manager or inbound channel. You can also save your filter sets to reuse later. When you build your filter sets, you can click **Clear all filters** to reset the Giving List.

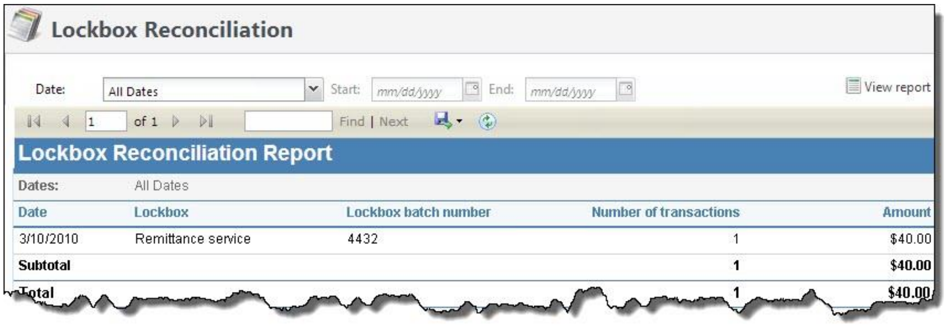
For more information about the list features, refer to the *General Features Guide*.

***Note:*** The Giving List can be exported to *Excel*, but it only includes the grid information. The summary information does not export.

***Show Me:*** Watch this video for a high-level overview of the Giving List

# Lockbox Reconciliation

Your organization may use a lockbox service to collect and process payments. For example, your donors may mail payments in response to an appeal directly to a secure location, such as a post office box. The lockbox service then accesses this location to process the payments, such as to deposit the revenue directly into your organization’s bank account. The lockbox service also provides a batch file of the payments processed, which your organization can import into your database to create records of the transactions. For more information about how to import files, refer to the *Batch and Import Guide*. To view information about the lockbox batch files processed for a specific date or time period, you can generate the Lockbox Reconciliation report.




For the selected time period, you can view a breakdown of the batch files received. For each batch file, you can view its lockbox service, its total number of transactions, and its revenue amount. You can also view the total revenue amount of the batch files for the time period.

After you generate the report, you can print it or export it in several different formats.

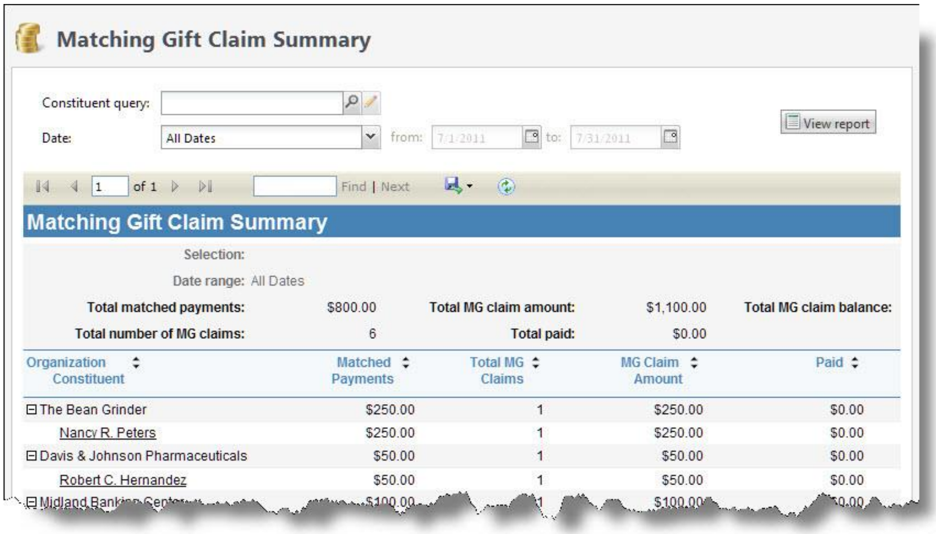
### View the Lockbox Reconciliation report

1. From *Revenue*, click **Lockbox reconciliation** under **Reports**. The Lockbox Reconciliation report page appears.
2. In the **Date** field, select the date or time period of the lockbox batch files to include in the report. If you select Specific date, select the start and end dates of the date range to include.
3. Click **View Report**. The program generates and displays the report.

# Matching Gift Claim Summary Report

With the Matching Gift (MG) Claim Summary report, you can view information about a specific set of matching gift claims, based on a query selection that you define. You can narrow the report to include only matching gift claims processed within a specific date range. When you generate a Matching Gift Claim Summary report, you can view information the organizations for which you have recorded matching gift claims, the total revenue those organizations matched, and for which constituents they matched revenue.

***Note:*** Only constituent organizations that have matching gift claim records will display in the report. Querying any constituents whose gifts are matched will not display the matching gift claim record. For example, if AAA Concrete has a matching gift claim record for a donation made by Robert Hernandez, querying on Robert Hernandez will not pull up the matching gift claim record.



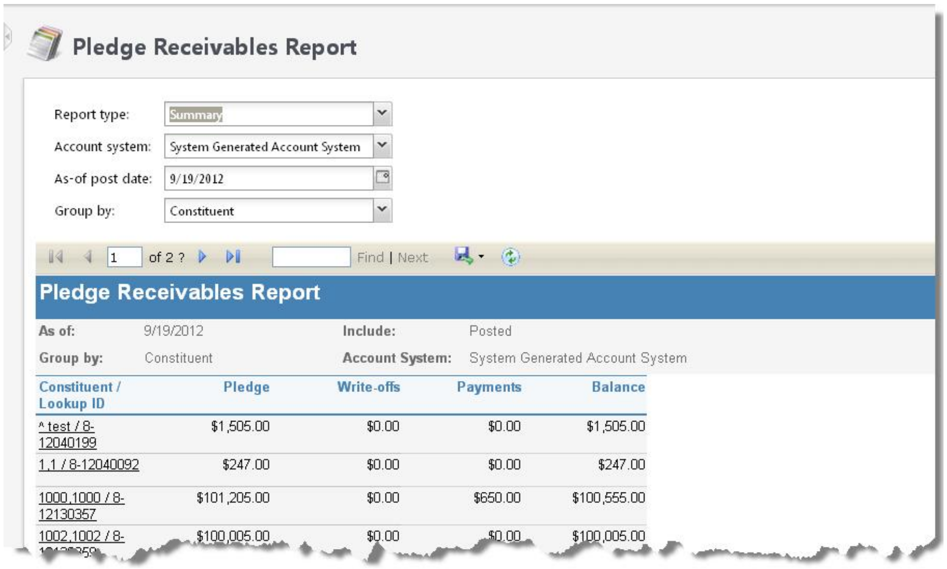

***Note:*** If your organization uses site security, the amounts that appear in the Matching Gift Claim Summary report include only revenue associated with the sites the user who generates the report has rights to access.

### View the Matching Gift Claim Summary report

1. From *Revenue*, click **Matching gift claim summary** under **Reports**. The Matching Gift Claim Summary page appears.
2. In the **Constituent query** field, enter the query selection with which to run the report, or click the magnifying glass to search for a constituent query selection. For more information about queries, refer to the *Query and Export Guide*.
3. To narrow the results by a specific date range, in the **Date** field, select the date range for which to view matching gift claim information.
   a. In the **from** and **to** fields, click the calendar icons to access calendars from which to select the date range.
4. To generate the report, click **View Report**. The Matching Gift Claim Summary report appears.

# Pledge Receivables Report

Use the Pledge Receivables report to view the detail and total amount of your outstanding pledges. Only posted activity is included in this report. You can filter the report by constituent or designation, and include only pledges with specific characteristics, such as account system and as-of post date. For each pledge, you can view its constituent and designation, pledge date, Lookup ID, and Revenue ID. You can also view information about any balance, payments, and write-offs associated with each pledge.




***Note:*** You cannot filter the Pledge Receivables report by transaction date. Therefore, report totals on other pledge reports may vary.

For pledges applied toward multiple designations, the Pledge Receivables report displays each designation split as a separate pledge.

To view the details of the pledges associated with a constituent or designation, you can expand the constituent's or designation's node in the report.

To view additional information about a constituent, designation, pledge, click its link in the report.

***Note:*** The purpose of this report is to reflect the detail and total amount of your outstanding pledges. Therefore, this report includes only posted activity. If you have pledges in your system marked as “Do Not Post,” they will not appear on the Pledge Receivables Report.

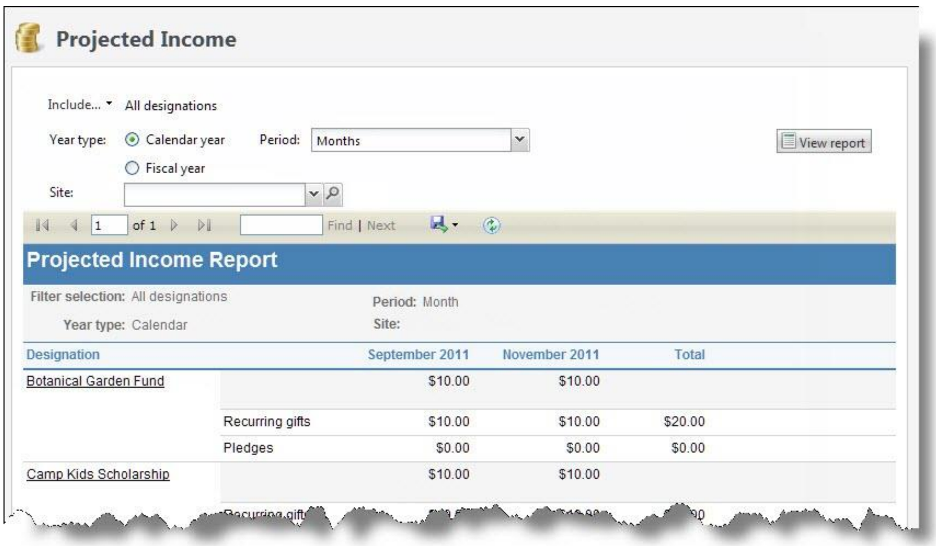
### View the Pledge Receivables report

1. From *Revenue*, click **Pledge receivables report** under **Reports**. The Pledge Receivables Report page appears.
2. In the **Report type** field, select "Detail" to view the report with all pledge detail included. To view a summary of the report, select "Summary."
3. Select the Account System for which you want to run the report.
4. In the **As-of post date** field, enter the as-of post date for which you want to include pledge receivables. The as-of date you enter includes transactions up to, and including, that date.
5. In the **Group by** field, select whether to group the pledge receivables included in the report by constituent or designation.
6. To generate the report, click **View report**. The Pledge Receivables report appears.

# Projected Income Report

The Projected Income report provides information about anticipated revenue from scheduled pledge installments and recurring gift payments. When you run the report, you can select whether to display projected revenue from pledges and recurring gifts until the end of either the calendar year or fiscal year. You can also select whether to view totals from all designations, selected designations, or a specific designation. When you run the Projected Income report, the program calculates and displays the total projected revenue from pledges and recurring gifts until the end of the calendar year or fiscal year, broken down by period of month, quarter, or year.

***Note:*** Only recurring gifts with a status of "Active" or "Lapsed" count towards the projected income.




***Note:*** If your organization uses site security, the amounts that appear in the Projected Income report include only revenue associated with the sites the user who generates the report has rights to access.

When you generate a report, you can use the toolbar buttons to modify how you view the report. The toolbar buttons are common to all reports.

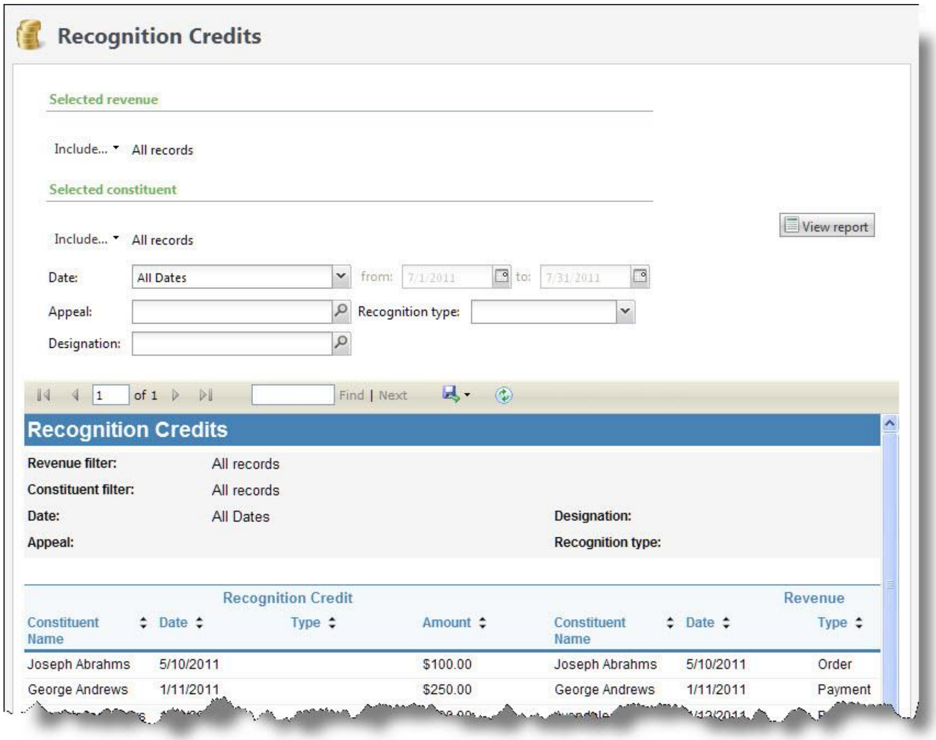
### View the Projected Income report

1. From *Revenue*, click **Projected income**under **Reports**. Or, from *Analysis*, select **Revenue reports**, **Projected income**. The Projected Income report page appears.
2. Select whether to include revenue toward all designations, selected designations, or a specific designation. If you select "Selected designations," search for the selection of designations to include.
3. For **Year type**, select whether to calculate projected income to the end of the calendar year or fiscal year.
4. In the **Period** field, select whether to view totals by month, quarter, or year.
5. To include only revenue associated with a specific site, in the **Site** field, select the site to include.

6. Click **View Report**. The program generates and displays the report.

# Recognition Credits Report

To view recognition credit information for a selected group of revenue or constituents, generate the Recognition Credits report. For example, generate this report to make sure board members are correctly recognized for gifts for a given period of time.




***Note:*** If your organization uses site security, the amounts that appear in the Recognition Credits report include only revenue and recognition associated with the sites the user who generates the report has rights to access.

The Recognition Credits report displays a list of constituents and recognition credits with the associated revenue. The recognition credit constituent name, recognition credit type, effective date, and the recognition amount display on the report. In addition, the report also displays the donor constituent name, the revenue date, revenue type, and revenue amount for the revenue associated with the recognition credit.

### View the Recognition credits report

1. From *Revenue*, click **Recognition credits**under **Reports**. Or, from *Analysis*, select **Revenue reports**, **Recognition credits**. The Recognition Credits screen appears.
2. In the **Selected revenue** frame, click **Include** and select the records to include. Select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific

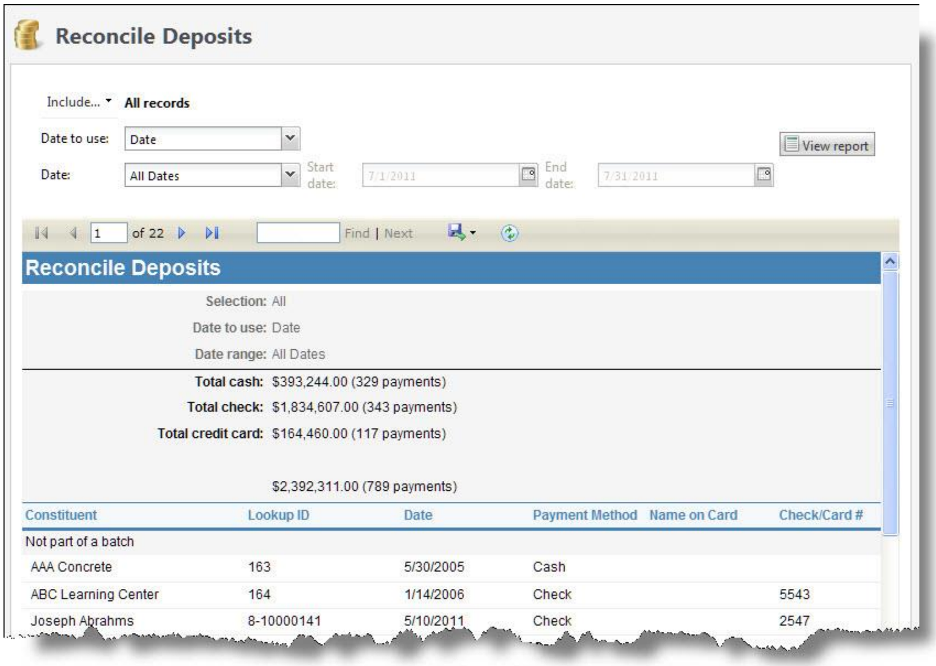
record," in the field that appears, click the magnifying glass to search for the revenue transaction records to include in the report.

> ***Note:*** If you select a revenue transaction query and a constituent query, the two queries merge before query results appear. However, records in the revenue transaction query that are not in the constituent query are removed from the merged query. For example, Michael Adamson's $50 cash gift is in the revenue transaction query. Because Michael Adamson is not in the constituent query, he does not appear in the report results.

3. In the **Selected constituent** frame, click **Include** and select the records to include. Select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears, click the binoculars to search for the constituent records to include in the report.
4. Enter the date range to filter the report.
   - In the **Date** field, select a date for which to view constituent recognition credit information.
   - If, in the **Date** field, you select "Specific date," in the next field, click the calendar and select the date for which to view recognition credit information. The report will display information only for the date you select.
5. Select filters as necessary, such as by appeal, designation, campaign, or recognition type.
6. Click **View Report**. The program generates and displays the report.

# Reconcile Deposits Report

You must reconcile the payments entered in the program or posted to the General ledger with your organization's bank deposit. To help reconcile the payments your organization receives to the revenue deposited to your organization's bank account, the program provides the Reconcile Deposits report.



***Note:*** If your organization uses site security, the amounts that appear in the Reconcile Deposits report include only revenue associated with the sites the user who generates the report has rights to access.

The Reconcile Deposits report provides information about the cash, check, credit card, and direct debit payments received from a selection of revenue records, including the sum of the selected payments, the constituent who made each payment, the date of each payment, and the payment method and amount of each payment. The report groups payments by batch and provides the sum and count of payments received that can be deposited, by payment type.

#### View the Reconcile Deposits report

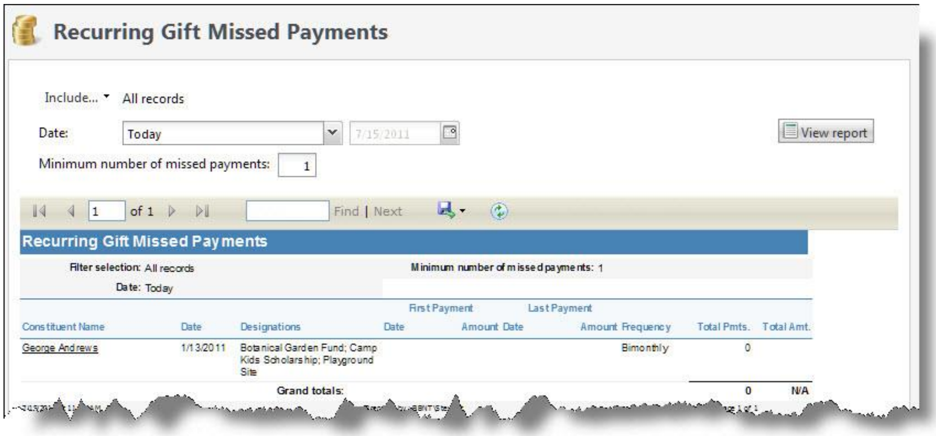
1. From *Revenue*, click **Reconcile deposits** under **Reports**. Or, from *Analysis*, click **Revenue reports** and then **Reconcile deposits**. The Reconcile Deposits screen appears.
2. To select the revenue transactions to include, click **Include** and select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears,search for and select the records to include in the report.
3. In the **Date to use** field, select whether to use the “Date” or the “Post date” for the revenue.
4. Enter the date range for which to view deposits.
   - In the **Date** field, select a date for which to view deposits.
   - In the **from** and **to** fields, use the calendars to select a date range for which to view deposits. The report will display deposits only for the date or date range you select.

   ***Note:*** The Reconcile Deposits report shows only payments that can be deposited, regardless of whether the selection contains revenue that cannot be deposited.
5. Click **View Report**. The program generates and displays the report.

# Recurring Gift Missed Payments Report

The Recurring Gift Missed Payments Report processes information for recurring gifts with missed payments, such as the number of payments skipped or missed since the last payment made. For example, you may want to see all donors who missed their last three payments. You can then use the information to contact them about resuming their donations.

***Note:*** This report includes recurring gifts of all statuses.




***Note:*** If your organization uses site security, the amounts that appear in the Recurring Gift Missed Payment report include only revenue associated with the sites the user who generates the report has rights to access.

The report processes information based on the number of payments skipped or missed since the last payment made. For example, Robert Hernandez made a recurring gift of $10 on January 1 with a transaction due on the first of each month. Since then, Robert made the following payments.

| Date | Payment |
|---|---|
| January 1 | $10 payment received |
| February 1 | $10 payment received |
| March 1 | $10 payment received |
| April 1 | $10 payment received |
| May 1 | no payment received |
| June 1 | no payment received |
| July 1 | no payment received |

If you run the report on July 15 with the missed payments of “3,” the report includes Robert Hernandez because he missed his last three payments.

***Note:*** This report does count the payments with the current date in the missed payments if the "Today" or "Specific date" of the current date filters are selected.

## View the Recurring Gift Missed Payments Report

1. From *Revenue*, click **Recurring gift missed payments**under **Reports.** Or, from *Analysis*, click **Revenue reports** and then **Recurring gift missed payments**. The Recurring Gift Missed Payments Report screen appears.
2. To select the revenue transactions to include, click **Include** and select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears,search for and select the records to include in the report.

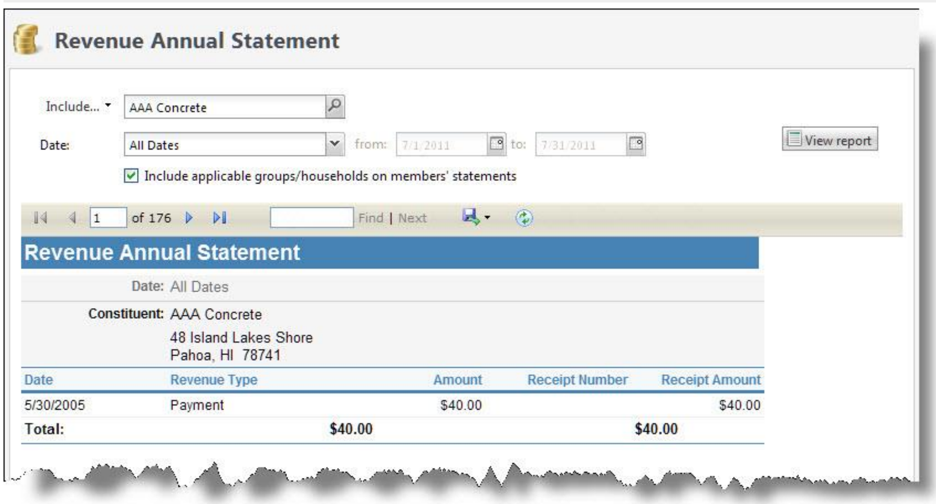
3. In the **Date** field, select a date for which to view missed recurring gift payments. If you select "Specific date," select the date for which to view missed recurring gift payments. The report will display all missed recurring gift payments only for the date you select.
4. In the **Minimum number of missed payments** field, enter the minimum number of missed payments to include.
5. With *Multicurrency*, the **Currency** field appears. Use this field to determine how you want to view transaction amounts in the report.

   "Base" is the base currency of the associated account system. "Organization" is the organization currency, and "Transaction" is the revenue's transaction currency. When you add revenue, the program calculates and stores the base currency and organization currency amounts, along with the original transaction currency amount. When you switch currencies on the report, the amounts displayed are the original currency amounts calculated when the transactions were added.
6. Click **View Report**. The program generates and displays the report.

# Revenue Annual Statement Report

The Revenue Annual Statement Report provides constituent giving histories for a time period you select. It can include receipt information, including receipts with no receipt amount. This report is useful to send to constituents as an end-of-the-year report so they can review their donations for tax purposes. Each constituent's information appears on a separate page. The data included depends on the parameters you select.

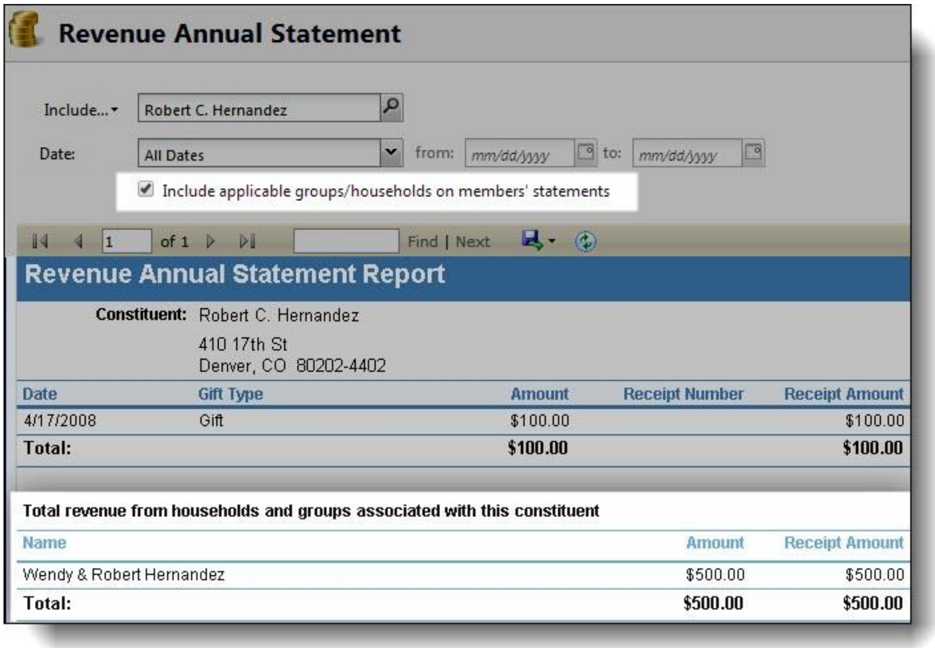
***Note:*** This report only contains payment revenue.




***Note:*** If your organization uses site security, the amounts that appear in the Revenue Annual Statement report include only revenue associated with the sites the user who generates the report has rights to access.

If your organization uses constituent groups and households, you can select to view any revenue from the constituent group or household of which the constituents in the report are members. For example, if revenue information for Robert Hernandez appears in the Revenue Annual Statement Report, you can also view total giving information for the Hernandez household.

***Note:*** Groups and households will still have their own statements in the report if they are included in the report criteria regardless of whether they appear on individual constituent's statements.

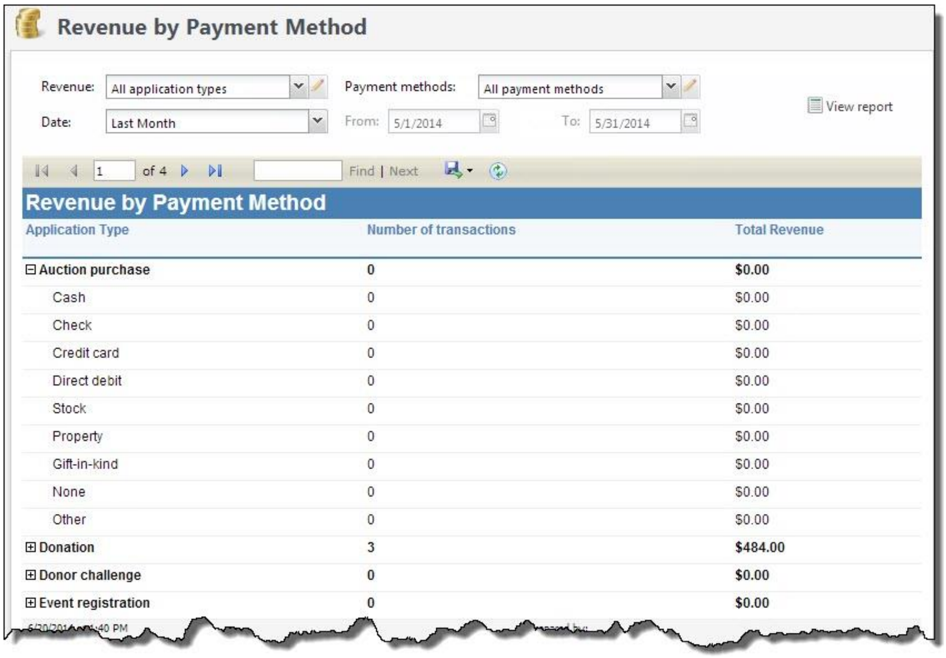



## View the Revenue Annual Statement report

1. From *Revenue*, click **Revenue annual statement** under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Revenue annual statement**. The Revenue Annual Statement Report screen appears.
2. To select the constituents to include, click **Include** and select "All records," "Selected records," or "Specific record." If you select "Selected records" or "Specific record," in the field that appears,search for and select the records to include in the report.
3. Enter the date range for which to view constituent giving histories.
   - In the **Date** field, select a date for which to view constituent giving histories.
   - If, in the **Date** field, you select “Specific date,” in the date range fields, click the calendar and select the date range for which to view constituent giving histories. The report displays only constituent giving histories for the date range you select.
4. To display revenue information for any households or groups of which the constituent is a part, select **Include applicable groups/households on members’ statements**.
5. Click **View Report**. The program generates and displays the report.

# Revenue by Payment Method Report

The Revenue by Payment Method report provides a breakdown of revenue activity by payment method. When you run the report, you can select to include revenue of all application types and payment methods or only specific application types and payment methods. You can also select whether to include only revenue from a specific time period. When you run the Revenue by Payment Method report, the program displays a breakdown of the number of transactions and total revenue received by each payment method for each revenue type.




**Note:** If your organization uses site security, the amounts that appear in the Revenue by Payment Method report include only revenue associated with the sites the user who generates the report has rights to access.

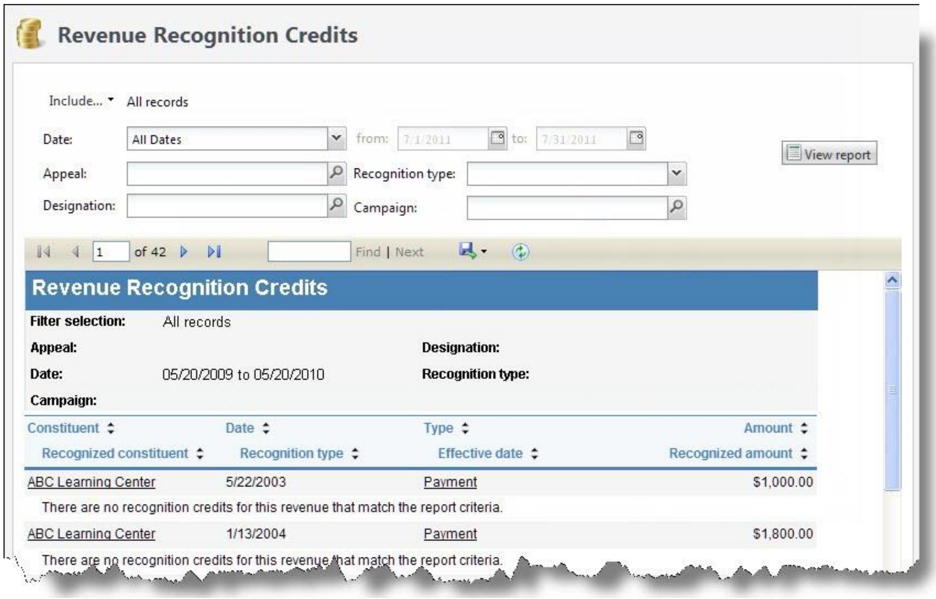
### View the Revenue by Payment Method report

1. From *Revenue*, click **Revenue by payment method** under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Revenue by payment method**. The Revenue by Payment Method screen appears.
2. In the **Revenue** field, select whether to include revenue applied toward all application types or only specific applications. If you select "Selected application types," select the types of applications to include such as donations and pledges.
3. In the **Payment methods** field, select whether to include revenue from all payment methods or only specific payment methods. If you select "Selected payment methods," select the types of payment methods to include.

4. In the **Date** field, select the time period of the revenue to include. To include all revenue transactions of the selected application types and payment methods, select "All dates." If you select "Specific date," enter the start and end dates of the time period.
5. Click **View Report**. The program generates and displays the report.

# Revenue Recognition Credits Report

To view recognition credit information for a selected group of revenue, generate the Revenue Recognition Credits report. For example, generate this report weekly to make sure recognition credit has been associated with revenue correctly.




***Note:*** If your organization uses site security, the amounts that appear in the Revenue Recognition Credits report include only recognitions associated with the sites the user who generates the report has rights to access.

The Revenue Recognition Credits report displays the constituent and date associated with the revenue, the revenue amount, and the revenue type. The report also displays a sub-report that lists the recognized constituent and effective date associated with recognition credit, the recognition amount, and the recognition type.

## View the Revenue recognition credits report

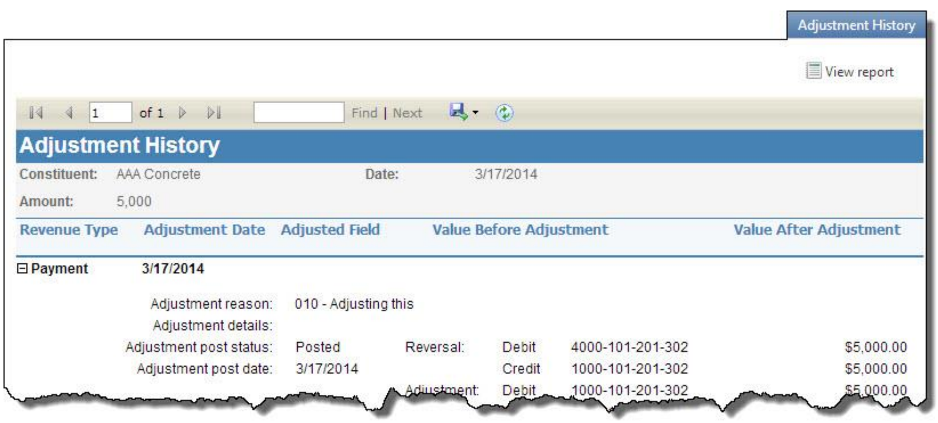
1. From *Revenue*, click **Revenue recognition credits**under **Reports**. Or, from *Analysis*, select **Revenue reports** and then **Revenue recognition credits**. The Revenue Recognition Credits screen appears.
2. Click **Include** and select the records to include. Select “All records,” “Selected records,” or “Specific record.” If you select “Selected records” or “Specific record,” in the field that appears, search for the revenue transaction records to include in the report.
3. Enter the date range to filter the report.

- In the **Date** field, select a date for which to view constituent revenue recognition credit information.
- If, in the **Date** field, you select “Specific date,” in the next field, click the calendar and select the date for which to view revenue recognition credit information. The report will display information only for the date you select.

4. To include recognition for a specific **Appeal** only, click the magnifying glass to search for and select an appeal. For example, select "Walk-A-Thon."
5. To include recognition for a specific **Designation** only, click the magnifying glass to search for and select a designation. For example, select "Library."
6. Select a **Recognition type** to filter the report. For example, select "Spouse."
7. To include recognition for a specific **Campaign** only, click the magnifying glass to search for and select a campaign. For example, select "Annual Campaign."
8. Click **View Report**. The program generates and displays the report.

# Adjustment History Report

To view a general summary of the adjustments made to the revenue after it posts to the General ledger, such as changes to the revenue amount or its designations, you can run the Adjustment History report.




The Adjustment History report displays the constituent and date associated with the revenue, the revenue amount, and the revenue type. The Adjustment History report also records and displays adjustments made to the posted revenue, including the date of the adjustment, the field adjusted, and the field value before and after the adjustment.

***Note:*** The Adjustment History Report displays a general summary of the adjustments made to a specific revenue record after it posts to the General ledger. To view adjustment information about all revenue adjustments within a specific date range, refer to Adjusted Revenue Report on page 136.

To generate this report, access the record of the revenue transaction. On the Adjustment history tab, click **View report**.

# Exception Report for Generate Payments Processes

When you run a generate payments process, the process status page appears and displays the number of records that did and did not generate payments. Payments that did not generate are called exceptions. When there are exceptions, you can view the Exception Report for the generate payments process. This report contains information about the payments that did not generate and explains why each did not generate. You can view the Exception Report from the generate payments process status page.

You can print a hard copy of the Exception Report. To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

### View the Exception Report for a generate payments process

1. Access the status page for the generate payments process for which you want to view exceptions.
2. Select which instance of the process to use to generate the report. You can generate an Exception Report for the most recent instance of the process or for a previous instance.
   - To generate an Exception Report for the most recent instance of a generate payments process, select the Recent status tab on the generate payments process status page.
   - To generate an Exception Report for a previous instance of a generate payments process, select the History tab on the process status page. In the grid, select the status record to use to create the Exception Report.

***Note:*** On the History tab, you can filter the status records that appear in the grid by the process status. If you filter the records in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that completed its operation, you can select to view only status records with a **Status** of "Completed." To filter the records that appear in the grid, click **Filters** in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

3. If the selected instance contains a commitment for which the program cannot generate a payment, the **Exception Report** button is enabled. On the action bar, click **Exception Report**. The Report Viewer screen appears. The program generates and displays the Exception Report.

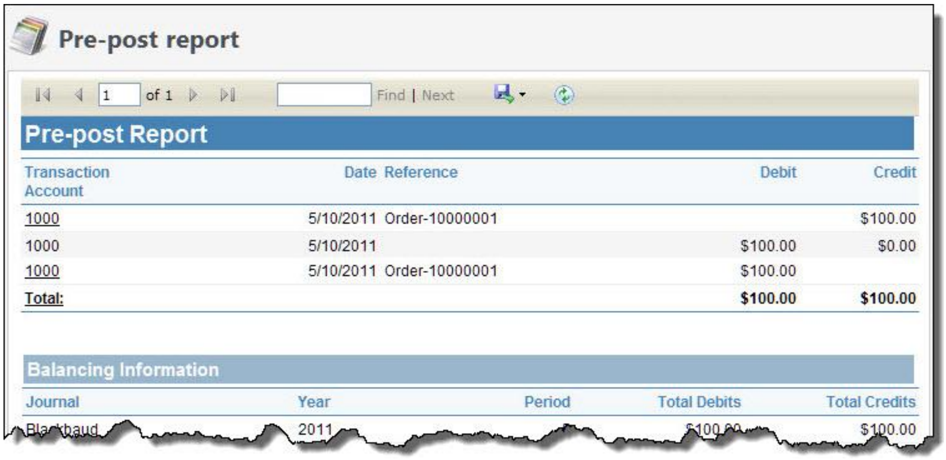
***Note:*** After you click **Exception Report**, you can stop the program from generating the report, such as if you decide to generate the report for a different instance of the process. To stop the program when it is generating the report, click the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears.

# Post Revenue to General Ledger Reports

You can generate multiple reports to view activity for a Post revenue to GL process.

## Pre-post Report

Before you post revenue to the General ledger, you can generate a preview report to determine if the post process includes the criteria you want to use. The report includes information about each transaction and displays the total amount of revenue that will be posted when you run the process. You can save or print the report. This report is view only and cannot be edited.



Pre-post report

Pre-post Report

| Transaction Account | Date | Reference | Debit | Credit |
|---|---|---|---|---|
| 1000 | 5/10/2011 | Order-10000001 | | $100.00 |
| 1000 | 5/10/2011 | | $100.00 | $0.00 |
| 1000 | 5/10/2011 | Order-10000001 | $100.00 | |
| Total: | | | $100.00 | $100.00 |

Balancing Information

| Journal | Year | Period | Total Debits | Total Credits |
|---|---|---|---|---|
| Blackbaud | 2011 | | $100.00 | $100.00 |

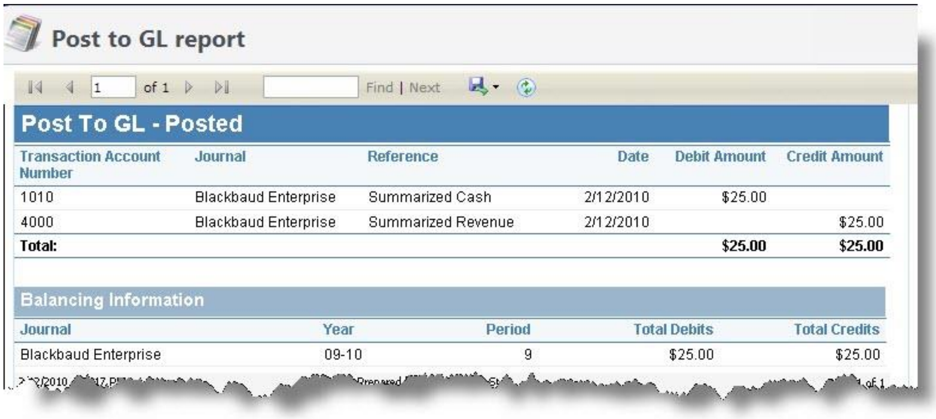
### Generate a Pre-post Report

You can access the Pre-post report from the Post Revenue to GL page. You can create this report only for process instances that have not yet been run.

1. From *Revenue*, click **Post revenue to GL**. The Post Revenue to GL page appears.
2. Under **Post to GL processes**, click the double arrows beside the post process for which to generate the report.
3. Click **Pre-post report**. The report appears.
4. To close the report and return to the previous page, click **Back**.

## Post to GL Report

The Post to GL report provides information about revenue that successfully posted with a post process. The report includes information such as post date, account, project, and debit and credit amounts. It also provides the grand total of the revenue posted with the process. You can save or print the report. This report is view only and cannot be edited.


Post to GL report

Post To GL - Posted

| Transaction Account Number | Journal | Reference | Date | Debit Amount | Credit Amount |
|---|---|---|---|---|---|
| 1010 | Blackbaud Enterprise | Summarized Cash | 2/12/2010 | $25.00 | |
| 4000 | Blackbaud Enterprise | Summarized Revenue | 2/12/2010 | | $25.00 |
| **Total:** | | | | **$25.00** | **$25.00** |

Balancing Information

| Journal | Year | Period | Total Debits | Total Credits |
|---|---|---|---|---|
| Blackbaud Enterprise | 09-10 | 9 | $25.00 | $25.00 |

**Note:** After you run a post process, the Post to GL report automatically appears.

**Warning:** The Batch column in the exported Post to GL report does not correspond to the Revenue Batch ID and will always be blank.

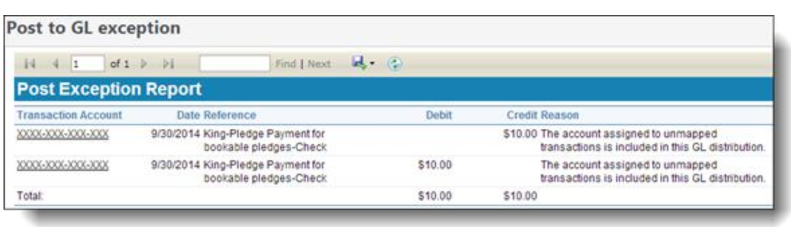
### Generate a Post to GL report

You can access the Post report from the Recent status tab or History tab on the status page of a post process. The instance of the process for which you generate the report must have a status of "Completed."

1. From *Revenue*, click **Post revenue to GL**. The Post Revenue to GL page appears.
2. Under **Post to GL processes**, click the name of the process for which to generate the report. The process status page appears.
3. Select for which instance to generate the report.
   - To generate the report for the most recent instance, select the Recent status tab.
   - To generate the report for a previous instance, select the History tab. In the grid, select the instance for which to generate the report.
4. On the action bar, click **Post report**. The report appears.

# Post to GL Exception Report

The Exception report provides information about revenue that did not successfully post with post process. This report includes information such as post date, account, project, debit and credit amounts, and the reason the post failed, such as a designation not mapped to a GL code. You can save or print the report. This report is view only and cannot be edited.


Post to GL exception

Post Exception Report

| Transaction Account | Date | Reference | Debit | Credit | Reason |
|---|---|---|---|---|---|
| XXXX-XXX-XXX-XXX | 9/30/2014 | King-Pledge Payment for bookable pledges-Check | | $10.00 | The account assigned to unmapped transactions is included in this GL distribution. |
| XXXX-XXX-XXX-XXX | 9/30/2014 | King-Pledge Payment for bookable pledges-Check | $10.00 | | The account assigned to unmapped transactions is included in this GL distribution. |
| Total: | | | $10.00 | $10.00 | |

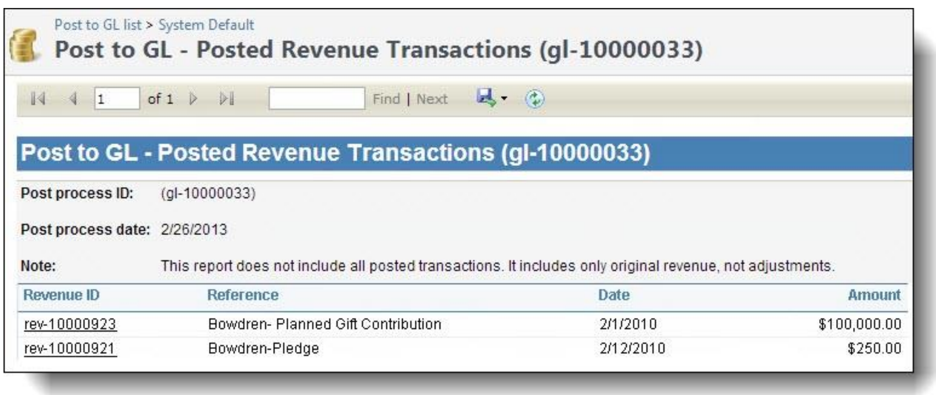
### Generate a Post to GL Exception report

You can access the exception report from the Recent status tab or History tab on the status page of a post process.

1. From *Revenue*, click **Post revenue to GL**. The Post Revenue to GL page appears.
2. Under **Post to GL processes**, click the name of the process for which to generate the report. The process status page appears.
3. Select for which instance to generate the report.
   - To generate the report for the most recent instance, select the Recent status tab.
   - To generate the report for a previous instance, select the History tab. In the grid, click the double arrows beside the instance for which to generate the report.
4. On the action bar, click **Exception report**. The report appears.

# Post to GL Posted Revenue Transactions Report

The Posted revenue transactions report provides a list of all revenue transactions successfully posted with a post process. This report includes information about only the original transactions posted by the process, and does not include adjustments. For each posted transaction, you can view the ID, reference, date, and amount. You can save or print the report. This report is view only and cannot be edited.




From the report, you can access the record of a transaction included in the process. To access the record, click its listing in the **Revenue ID** column of the report.

You can access the detail report from the Recent status tab or History tab on the status page of a post process. To access the report from the record of a transaction included in the process, click the ID number in the **Post process** field.

### Generate a Post to GL Posted Revenue Transactions report

1. From *Revenue*, click **Post revenue to GL**. The Post Revenue to GL page appears.
2. Under **Post to GL processes**, click the name of the process for which to generate the report. The process status page appears.
3. Select which instance to generate the report for.

- To generate the report for the most recent instance, select the Recent status tab.
- To generate the report for a previous instance, select the History tab. In the grid, click the double arrows beside the instance for which to generate the report.

4. Click **Posted revenue transactions**. The report appears.

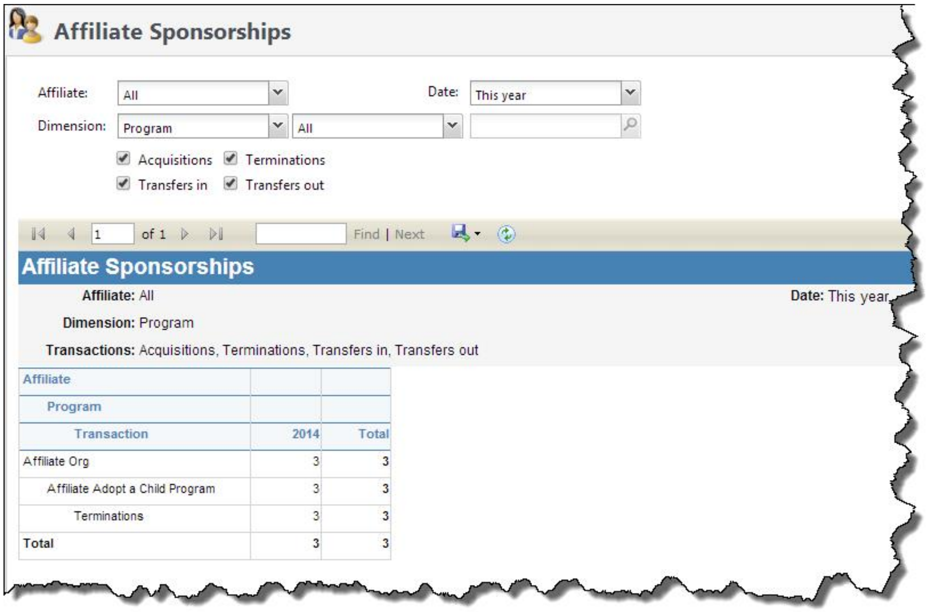
# Sponsorship Reports



*Sponsorship* includes several report options, which allow you to quickly and easily generate basic reports that track a variety of sponsorship-related activities. For example, you can generate a **Sponsorship past due** report to review details about past due sponsorship payments or a **Sponsorship acquisition** report to review details about opportunities acquired by sponsors.

## Affiliate Sponsorships

The **Affiliate Sponsorships** report provides details about sponsorships associated with affiliates in your database. You can view information for all affiliate sponsorships in your database, or you can select a specific affiliate organization for which to view data. You can filter your report further by selecting a dimension, such as “Program” or “Location type,” or selecting one or more transactions such as **Acquisitions**, **Terminations**, **Transfers in**, and **Transfers out**.




***Note:*** If your organization works with other organizations to locate sponsors for opportunities and one of these affiliates plan to participate in finding sponsors for a program, you can select to associate the program with the affiliate organization when you create the program.

### Generate an Affiliate sponsorship report

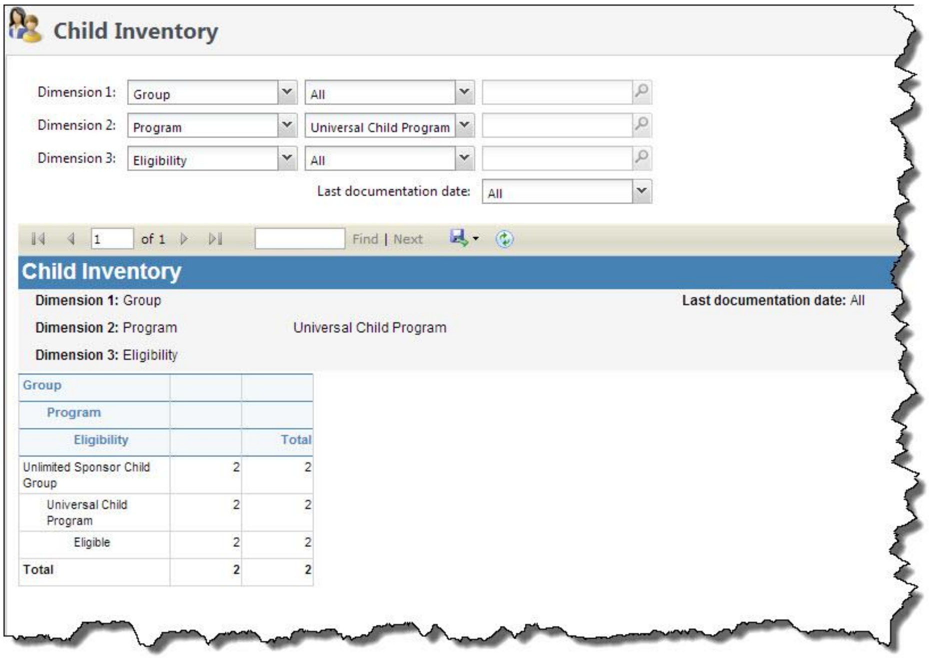
1. From the Sponsorship page, under **Reports**, select **Affiliate sponsorships**. The Affiliate Sponsorships page appears.
2. In the **Affiliate** field, select the affiliate organization for which you want to view information. All affiliates assigned in your system display in the drop-down menu. You can also choose to view data for “All” affiliates.
3. In the **Dimension** field, select the nesting dimension you want included in your report. For example, if you selected “All” in the **Affiliate** field and you want to see all affiliated sponsorship in each program, in **Dimension** select “Program” and then select “All” in the corresponding field.
4. In the **Date** field, select the date range on which you want to base your report. For example, if you select “This year,” any affiliate sponsorship information that displays is restricted to information entered this year.
5. In the **Transaction** section, select the transaction operations for which you want to view information. You can select as many options as necessary for your report.
6. Click **View Report** to generate your report.

# Child Inventory

The **Child Inventory** report option provides details about children in your database. You can view inventory information based on a selected group, program, location type, eligibility, age, gender, and availability or a combination of any three of these options, identified as "Dimensions" in the report parameters.

In the report, your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Availability" and "Reserved" in **Dimension 2**, only reserved children included in the program you selected in **Dimension 1** are included in the report.

You also further define information included in your report based on **Last documentation date**. This is a manually entered date that is often used to track when the child's case history was last updated.




## Generate a Child Inventory report

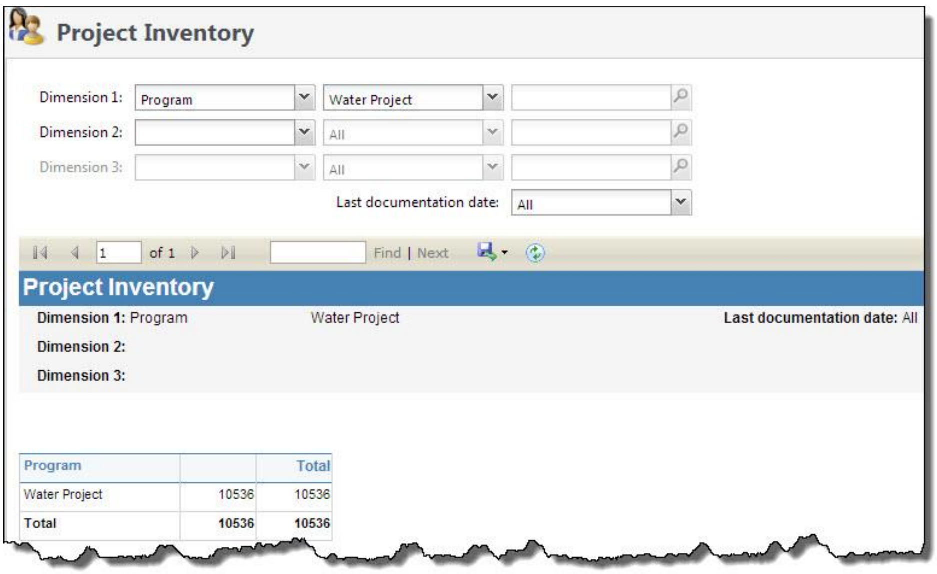
1. From the Sponsorship page, under **Reports**, select **Child inventory**. The Child Inventory page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all available children in each program, in **Dimension 2** select "Availability" and then select "Available" in the corresponding fields.
4. In the **Last documentation date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

# Project Inventory

The **Project Inventory** report option provides details about projects in your database. You can view inventory information based on a selected group, program, location type, status, availability, or category, or a combination of any three of these options, identified as "Dimensions" in the report parameters.

In the report, your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Status" and "Open" in **Dimension 2**, only open projects included in the program you selected in **Dimension 1** are included in the report.

You also further define information included in your report based on **Last documentation date**. This is a manually entered date that is often used to track when the project's case history was last updated.




## Generate a Project Inventory report

1. From the Sponsorship page, under **Reports**, select **Project inventory**. The Project Inventory page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all open projects in each program, in **Dimension 2** select "Status" and then select "Open" in the corresponding fields.
4. In the **Last documentation date** field, select the date range on which you want to base your report.

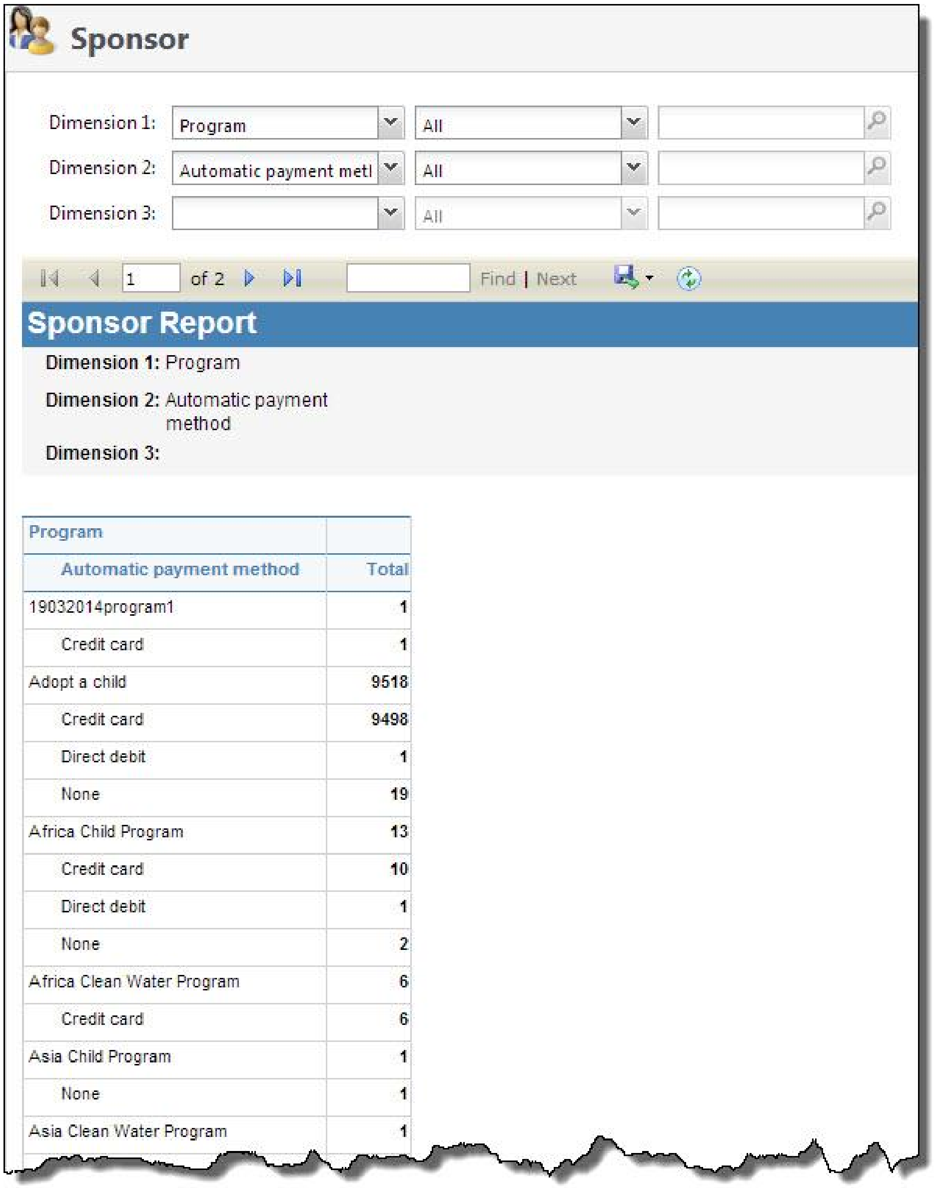
5. Click **View Report** to generate your report.

# Sponsor Report

The **Sponsor** report counts all sponsors at a given time with active sponsorships. The report offers a snapshot of the general health of your sponsor numbers.

***Note:*** This report includes the same dimensions as the **Sponsorship acquisition** report with an additional dimension for Number of sponsorships. The Number of sponsorship dimension has values of 1, 2, 3 and 4+.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select "Location type" in **Dimension 2**, only location types included in the program you selected in **Dimension 1** are included in the report.




## Generate a Sponsors report

1. From the Sponsorship page, under **Reports**, select **Sponsors**. The Sponsors Report page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and

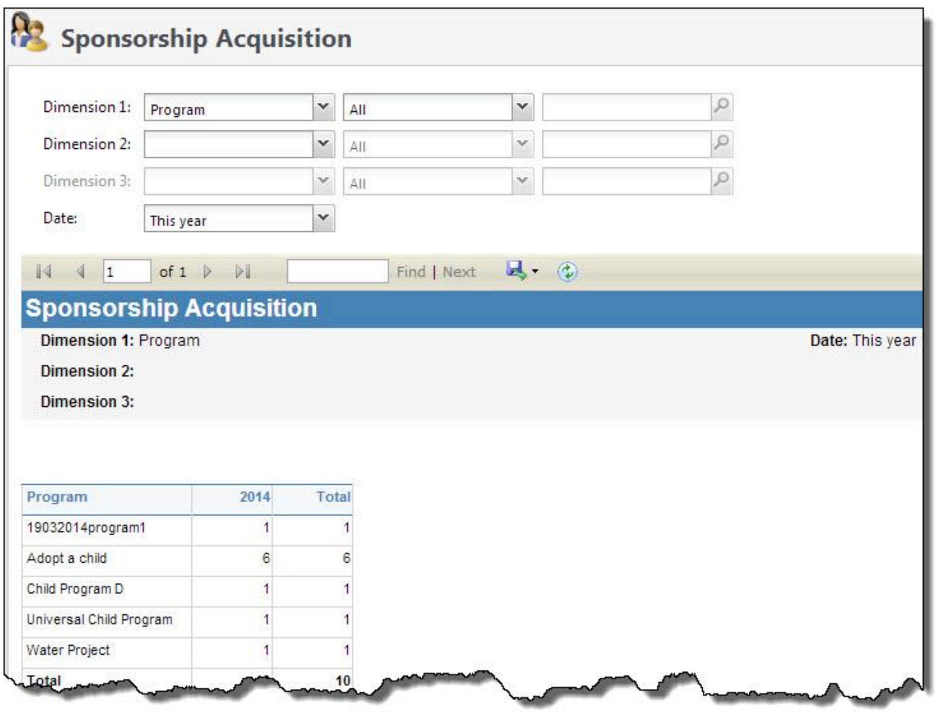
you want to see all program information for a specific location type, in **Dimension 2** select "Location types" and then select the type of location in the corresponding fields.

4. Click **View Report** to generate your report.

# Sponsorship Acquisition

The **Sponsorship acquisition** report provides details about new sponsorships satisfying your selected date parameters. The report looks at only the add and start dates of the sponsorship.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Location types" in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.




## Generate a Sponsorship acquisition report

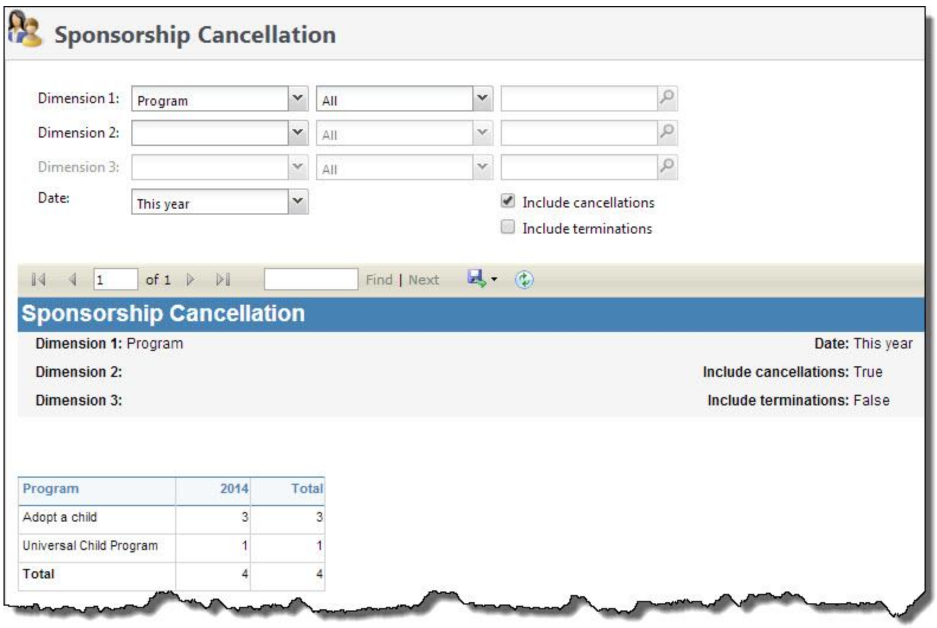
1. From the Sponsorship page, under **Reports**, select **Sponsorship acquisition**. The Sponsorship Acquisition page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.

3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

# Sponsorship Cancellation

The **Sponsorship cancellation** report provides details about canceled sponsorships in your system based on the sponsorship information you select.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select “Reason” as your **Dimension 1** any remaining dimension selections are restricted to the reason you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types associated with the reason you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.




## Generate a Sponsorship cancellation report

1. From the Sponsorship page, under **Reports**, select **Sponsorship cancellation**. The Sponsorship Cancellation page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on cancellation reasons, select “Reason.” In the corresponding field, enter the specific reason you want used. You can select “All” to see information for all cancellation reasons in your system.

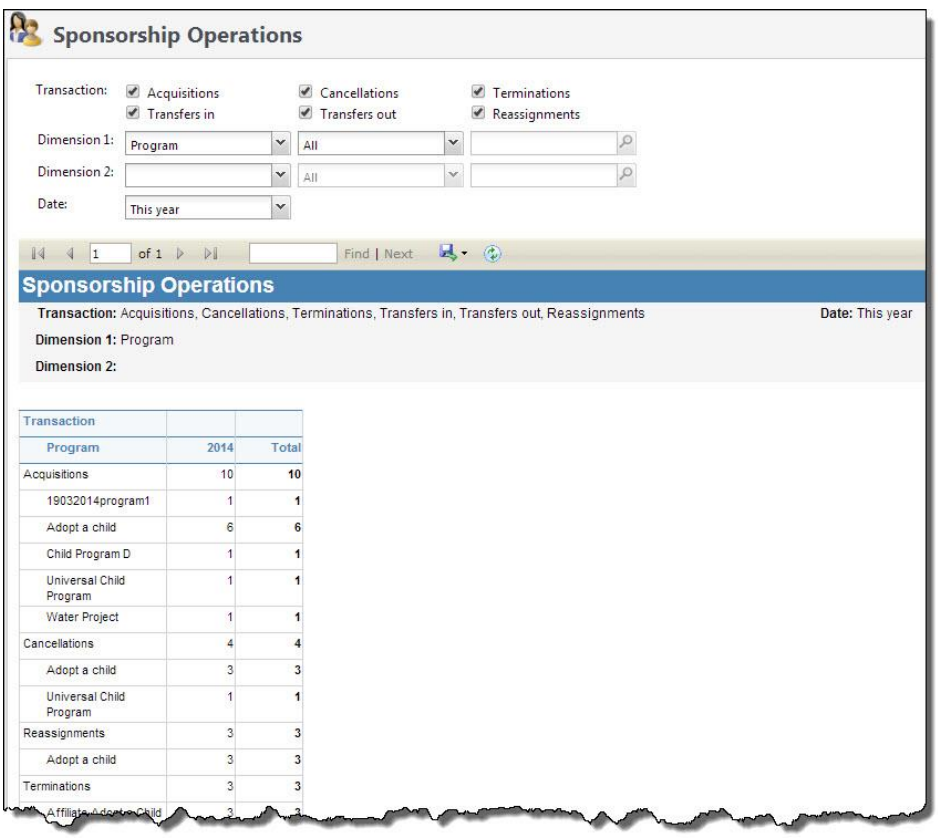
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Reason” and “All” for your **Dimension 1**, and you want to see all cancellation reason information for a specific location type, in **Dimension 2** select “Location type” and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Select to **Include terminations** and/or **Include cancellations**. You must select at least one.
6. Click **View Report** to generate your report.

# Sponsorship Operations

The **Sponsorship Operations** report provides details about sponsorship transactions, such as new assignments, transfers, cancellations, and terminations.

Additionally, you can base the report on two different dimensions, which are used to filter and group the report data. Your dimension selections are hierarchical and place restrictions on your selected transactions. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report and if you selected the “Transfer in” **Transaction**, only transfer in operations included in the selected program and location types are included in the report.

You can also further restrict information included in your report based on **Date**.



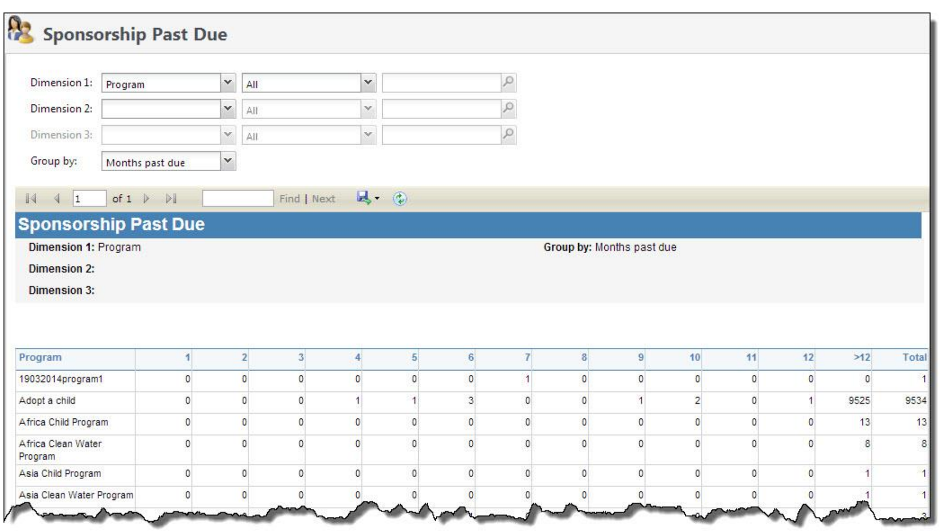
### Generate a Sponsorship operations report

1. From the Sponsorship page, under **Reports**, select **Sponsorship operations**. The Sponsorship Operations page appears.
2. In the **Transactions** section, select the transaction operations for which you want to view information. You must select at least one **Transaction** option.
3. In the **Dimension 1** field, select the top level dimension you want used to define your report. Transaction information included in the report is restricted to your dimension selections. For example, if you select a specific program in **Dimension 1** and a specific location in **Dimension 2**, transaction information is provided for the selected program in the selected location only. To view all selected transaction information, leave the **Dimension** fields blank.
4. In the **Dimension 2** field, select the nesting dimension you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all transaction information for programs for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
5. In the **Date** field, select the date range on which you want to base your report.
6. Click **View Report** to generate your report.

# Sponsorship Past Due

The **Sponsorship past due** report provides details about past due sponsorship accounts in your system.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.



### Generate a Sponsorship past due report

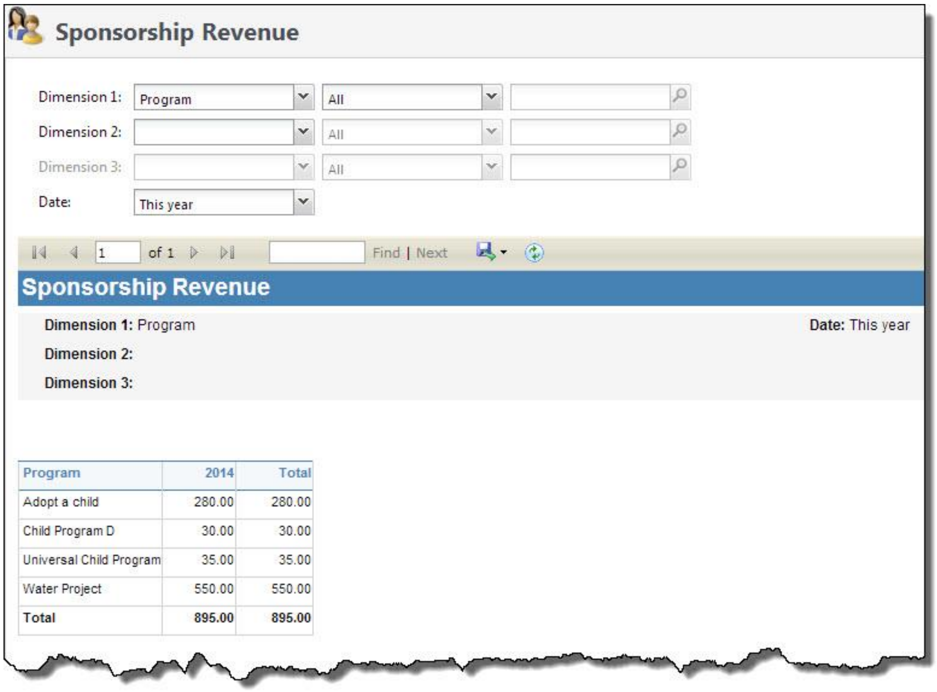
1. From the Sponsorship page, under **Reports**, select **Sponsorship past due**. The Sponsorship Past Due page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all past due information for programs for a specific location type, in **Dimension 2** select "Location types" and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

# Sponsorship Revenue

The **Sponsorship Revenue** report option provides detailed information about the revenue generated by your sponsorship activity. The report is based on payments not the auto payment method used.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Payment method" in **Dimension 2**, only sponsorships assigned the selected payment method and included in the program you selected in **Dimension 1** are included in the report.

You can also further restrict information included in your report based on **Date**. The report is based on when a payment was made.



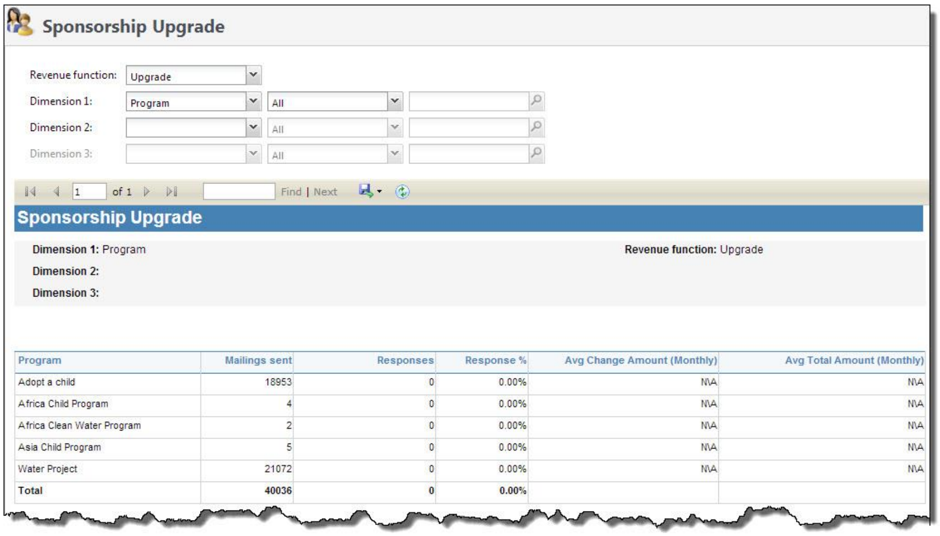

### Generate a Sponsorship revenue report

1. From the Sponsorship page, under **Reports**, select **Sponsorship revenue**. The Sponsorship Revenue page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see revenue information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all revenue information for a specific location type within each program, in **Dimension 2** select "Location type" and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

# Sponsorship Upgrade Report

The **Sponsorship upgrade** report tracks how many sponsors upgraded their sponsorship based on a specific revenue function. The report can help you determine the success of a specific campaign which was targeted for upgraded giving levels or to evaluate a response center team members success in upgrading sponsorships.

In addition to selecting a specific revenue function on which to base your report, you can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select "Appeal" in **Dimension 2**, only appeals included in the program you selected in **Dimension 1** are included in the report.



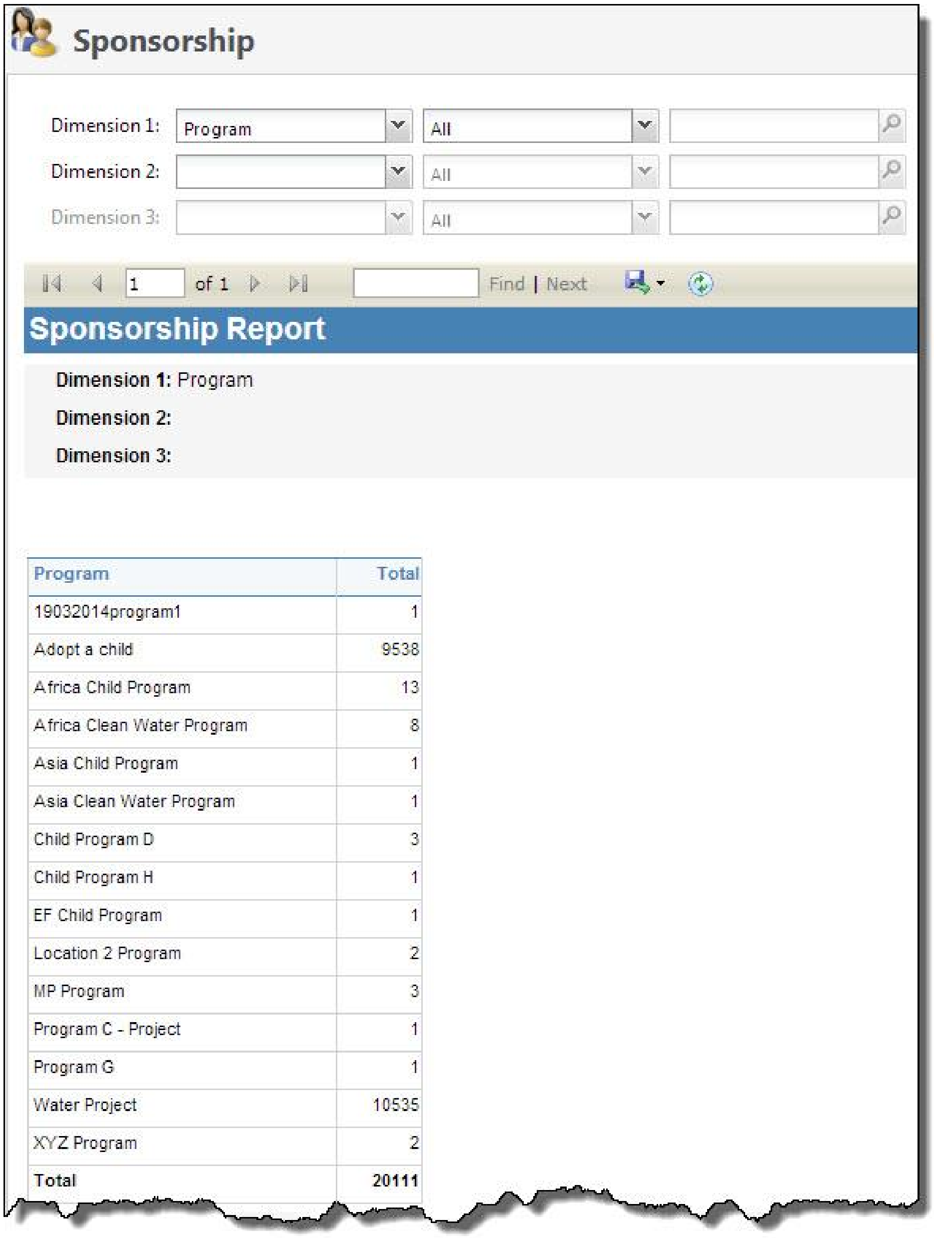

## Generate an Upgrade report

1. From the Sponsorship page, under **Reports**, select **Sponsorship upgrade**. The Sponsorship Upgrade Report page appears.
2. Select the **Revenue function** for which you want to track sponsorship information. For example, you may have a revenue function of "upgrade" on which you want to base your report.
3. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
4. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select "Location types" and then select the type of location in the corresponding fields.
5. Click **View Report** to generate your report.

# Sponsorship Report

The **Sponsorship** report counts all sponsorships in your system at the time you run the report.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select "Location Type" in **Dimension 2**, only location types included in the program you selected in **Dimension 1** are included in the report.




## Generate a Sponsorship report

1. From the Sponsorship page, under **Reports**, select **Sponsorship**. The Sponsorship Report page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship

programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.

3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. Click **View Report** to generate your report.

# Treasury Reports



You can generate several reports within *Treasury*. You can run Deposit reports, as well as run Miscellaneous payments reports and print receipts for miscellaneous payments.

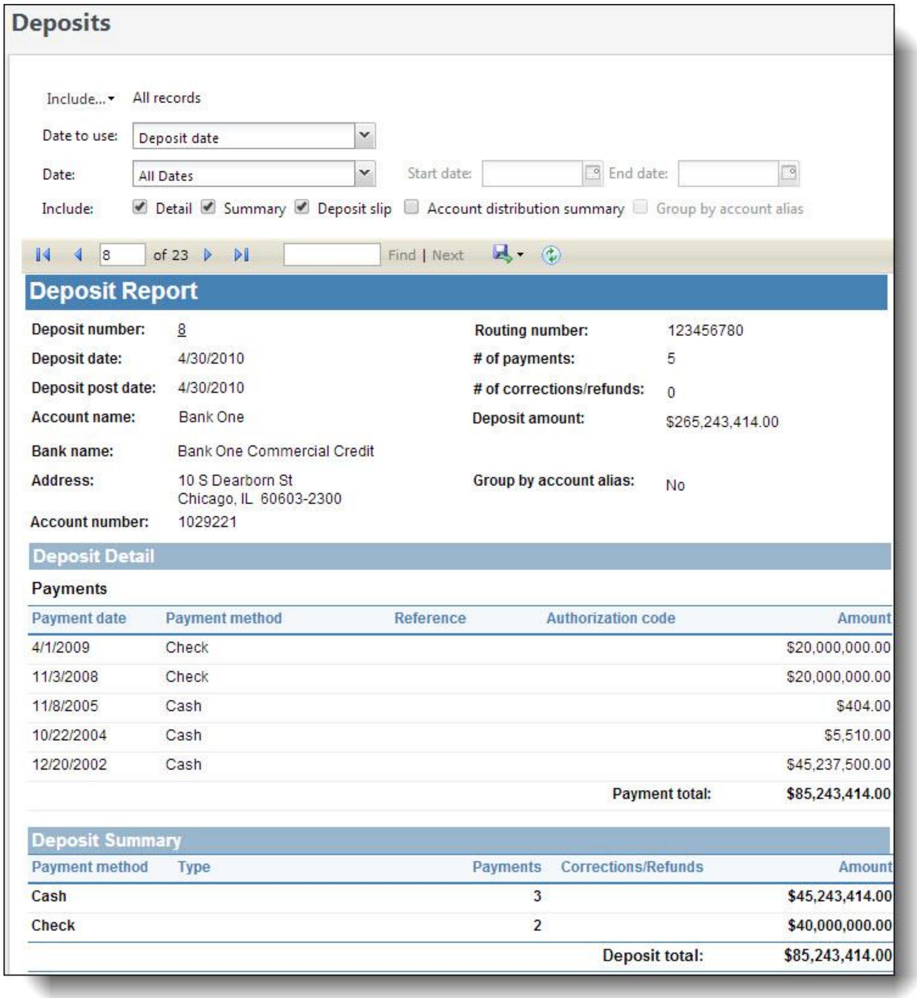
## Deposit Report

The Deposit report includes information about a selection of deposits, including a summarized breakdown of payments methods and bank information such as the account number and routing number. When corrections exist for a deposit, you can view the correction date, method, type, and amount.

***Note:*** Depending on the bank system associated with the deposit, routing number, sort code, and BIC information may display differently on the report. You can enable or disable bank systems for your organization from the **Banking systems** link on the Treasury page.

To access the report from *Treasury*, click **Deposit report** under **Reports**. The Deposit Report page appears.

***Note:*** You can also access a Deposit report by clicking **Analysis** on the navigation bar and selecting **Treasury reports**, **Deposit report** from the menu.


Deposits

Include... All records
Date to use: Deposit date
Date: All Dates Start date: End date:
Include: Detail Summary Deposit slip Account distribution summary Group by account alias

8 of 23 Find | Next

**Deposit Report**

| | | | |
|---|---|---|---|
| Deposit number: | 8 | Routing number: | 123456780 |
| Deposit date: | 4/30/2010 | # of payments: | 5 |
| Deposit post date: | 4/30/2010 | # of corrections/refunds: | 0 |
| Account name: | Bank One | Deposit amount: | $265,243,414.00 |
| Bank name: | Bank One Commercial Credit | | |
| Address: | 10 S Dearborn St<br>Chicago, IL 60603-2300 | Group by account alias: | No |
| Account number: | 1029221 | | |

**Deposit Detail**

Payments

| Payment date | Payment method | Reference | Authorization code | Amount |
|---|---|---|---|---|
| 4/1/2009 | Check | | | $20,000,000.00 |
| 11/3/2008 | Check | | | $20,000,000.00 |
| 11/8/2005 | Cash | | | $404.00 |
| 10/22/2004 | Cash | | | $5,510.00 |
| 12/20/2002 | Cash | | | $45,237,500.00 |
| | | | Payment total: | $85,243,414.00 |

**Deposit Summary**

| Payment method | Type | Payments | Corrections/Refunds | Amount |
|---|---|---|---|---|
| Cash | | 3 | | $45,243,414.00 |
| Check | | 2 | | $40,000,000.00 |
| | | | Deposit total: | $85,243,414.00 |

At the top of the report, click **Include** and select “All records,” “Selected records,” or “Specific record,” If you choose “Selected records,” click the magnifying glass to search for the selection query to use. For more information about queries, refer to the *Query and Export Guide* . If you select “Specific record,” click the magnifying glass to search for a single deposit. You can then select a deposit date or post date and a date range.

To include detail or summary information in the report, select the appropriate checkboxes. Your selections here apply to all deposits included in the report.

To create a deposit slip for each deposit included in the report, select **Deposit slip**. When you preview the report, the program generates a print-ready deposit slip for each deposit in the report.

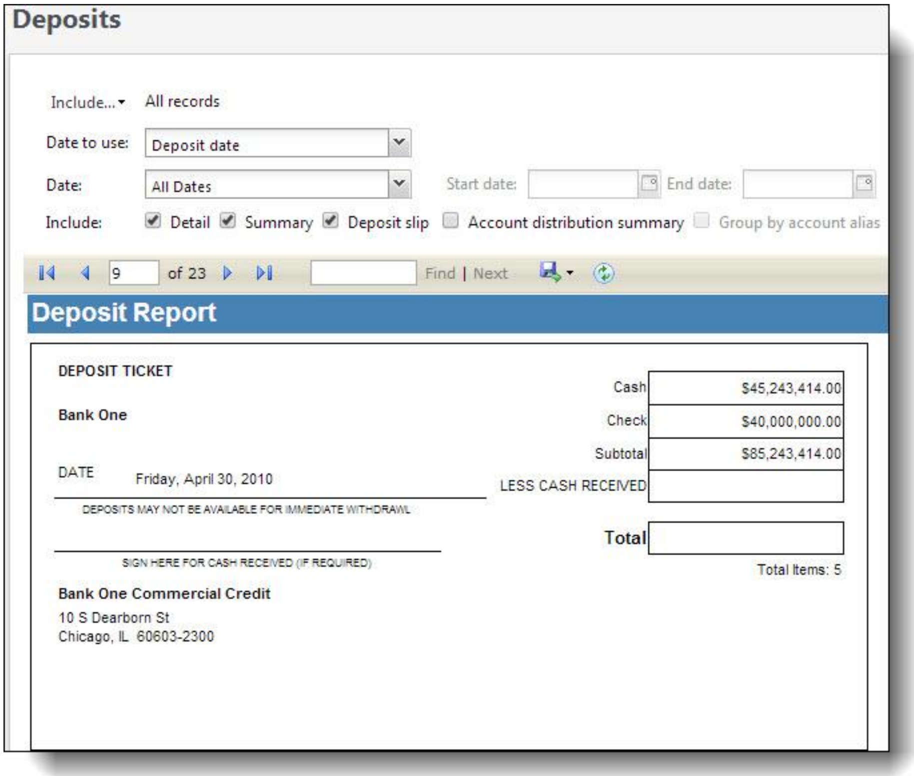
Select **Account distribution summary** to view an account distribution summary for each deposit included in the report.

When you select **Account distribution summary**, the **Group by account alias** filter is enabled. Select this to group the report by account alias. If you do not select this option, the report is grouped by GL account.

***Note:*** With *Multicurrency*, the account distribution summary section displays additional currency information.

Once you define parameters for the report, click **View Report**.

For each deposit included in the report, a deposit slip appears on the next consecutive page.



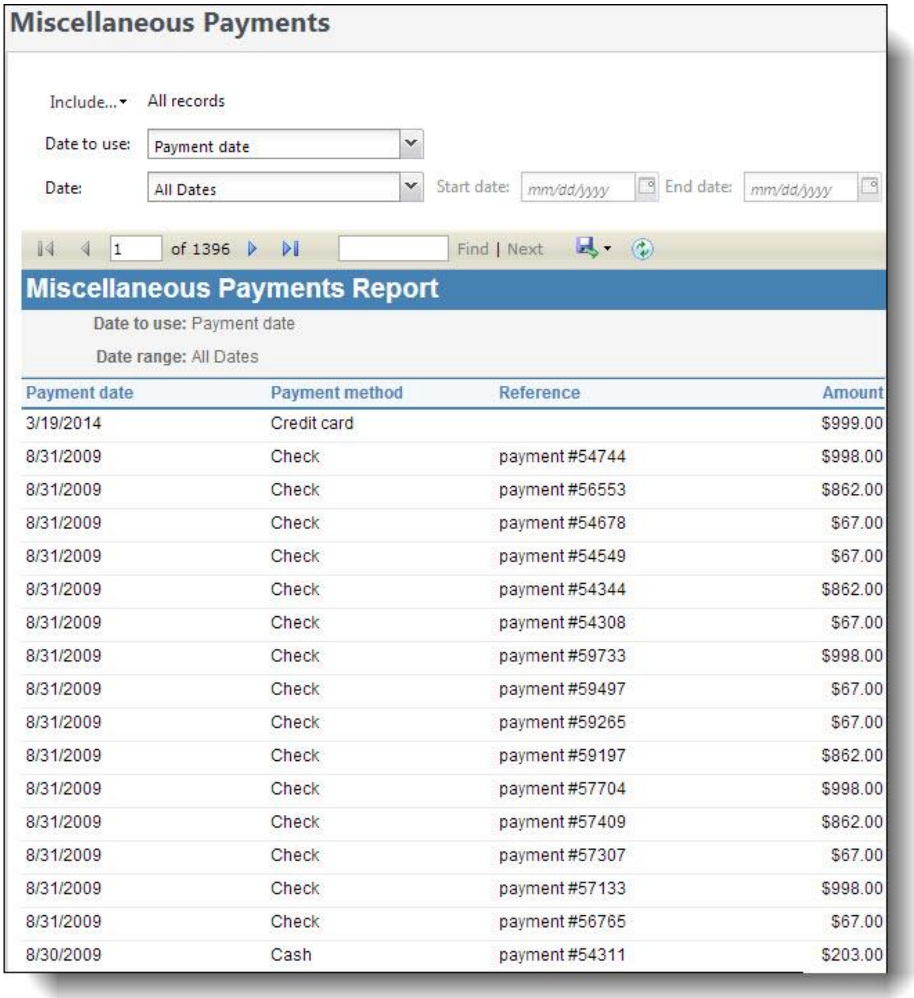

After viewing, you can export the report in a number of different formats.

***Warning:*** If your organization configures multiple General ledger account systems, the deposit report only displays data for the account system(s) to which a user has access.

# Miscellaneous Payments Report

The Miscellaneous payments report displays selected miscellaneous payments. For each miscellaneous payment, the date, payment method, reference, and amount appear on the receipt.

To access the report, click **Miscellaneous payments report** under **Reports** on the Treasury page. The Miscellaneous Payments Report page appears.


Miscellaneous Payments

Include... All records

Date to use: Payment date

Date: All Dates Start date: mm/dd/yyyy End date: mm/dd/yyyy

1 of 1396 Find | Next

Miscellaneous Payments Report

Date to use: Payment date

Date range: All Dates

| Payment date | Payment method | Reference | Amount |
|---|---|---|---|
| 3/19/2014 | Credit card | | $999.00 |
| 8/31/2009 | Check | payment #54744 | $998.00 |
| 8/31/2009 | Check | payment #56553 | $862.00 |
| 8/31/2009 | Check | payment #54678 | $67.00 |
| 8/31/2009 | Check | payment #54549 | $67.00 |
| 8/31/2009 | Check | payment #54344 | $862.00 |
| 8/31/2009 | Check | payment #54308 | $67.00 |
| 8/31/2009 | Check | payment #59733 | $998.00 |
| 8/31/2009 | Check | payment #59497 | $67.00 |
| 8/31/2009 | Check | payment #59265 | $67.00 |
| 8/31/2009 | Check | payment #59197 | $862.00 |
| 8/31/2009 | Check | payment #57704 | $998.00 |
| 8/31/2009 | Check | payment #57409 | $862.00 |
| 8/31/2009 | Check | payment #57307 | $67.00 |
| 8/31/2009 | Check | payment #57133 | $998.00 |
| 8/31/2009 | Check | payment #56765 | $67.00 |
| 8/30/2009 | Cash | payment #54311 | $203.00 |

At the top of the report, click **Include** and select “All records,” “Selected records,” or “Specific record.” If you choose “Selected records,” click the magnifying glass to search for the selection query to use. For more information about queries, refer to the *Query and Export Guide*. If you select “Specific record,” click the magnifying glass to search for a single miscellaneous payment. You can then select a miscellaneous payment date or date range. Once you define the parameters for the report, click **View Report**. After viewing, you can print the report or export the report in a number of different formats.

***Note:*** You can also access the Miscellaneous payments report by clicking **Analysis** on the navigation bar and selecting **Treasury reports**, **Miscellaneous payments reports** from the menu.

***Warning:*** If your organization configures multiple General ledger account systems, the miscellaneous payments report only displays data for the account system(s) to which a user has access.

# Receipt for Miscellaneous Payment

The Receipt for Miscellaneous Payment Report displays the receipt for the selected miscellaneous payment. For each miscellaneous payment receipt, the receipt date and number, payment method, reference date, and amount appear on the receipt. When you run the Receipt for Miscellaneous Payment report, the payment is marked as “receipted.”

To access the report, click **Receipt for miscellaneous payment** under **Reports** on the explorer bar of the Miscellaneous Payment page. The Miscellaneous Payments Report page appears.


Receipt for Miscellaneous Payment

| | |
|---|---|
| Receipt date: | 9/3/2014 |
| Receipt number: | 29 |
| Payment method: | Other |
| Other description: | Gift card |
| Reference date: | |
| Reference number: | |

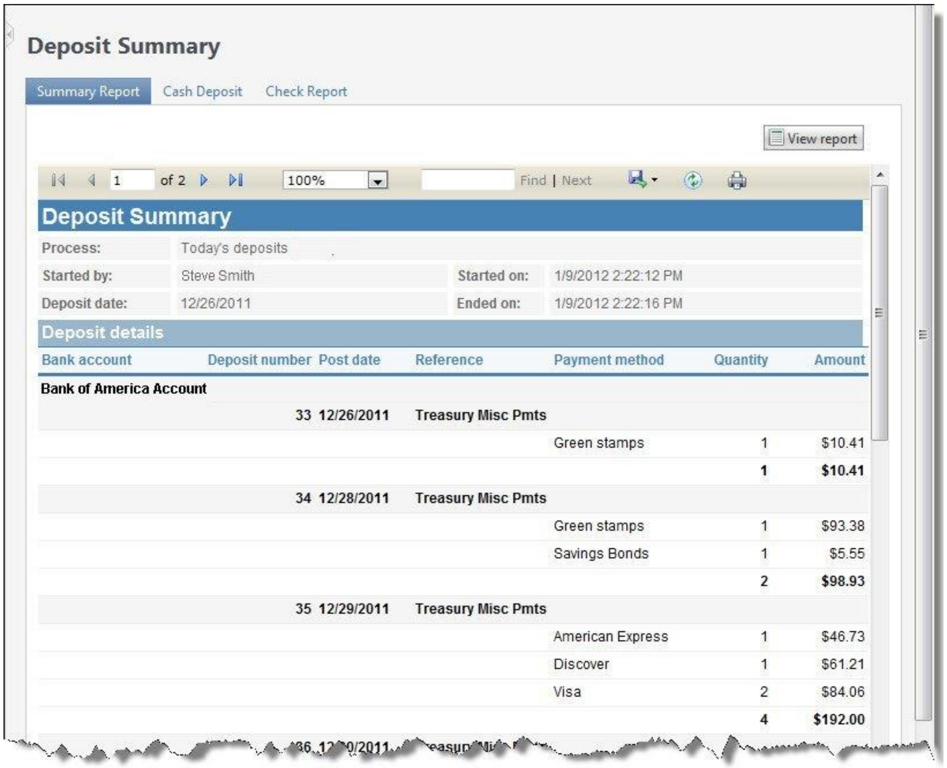
| Payment date | Reference | Amount |
|---|---|---|
| 3/25/2013 | | $50,000.00 |

# Deposit Summary Report

The Deposit Summary report displays a list of deposits created during a specific deposit process. When the deposit process runs, payments with a “Not posted” status are linked to one deposit and payments with a status of “Do not post” are linked to another deposit.

On this report, you can view specific details about the deposit process you select. The details display the payment methods and amounts included in each deposit, grouped by bank account. You can view and print the Deposit Summary report for completed deposit processes only.

After you run the deposit process, you can view the Deposit Summary report on the Recent Status or History tabs. To view the Deposit Summary report, click **View report** on the action bar.




Depending on the payment methods included in the deposit, the report may display **Cash**, **Check**, or **Cash and Check** tabs beside the **Summary Report** tab. On these tabs, you can use filters to define the information you want to view in the report. You can select all or specific records to include, use date filters, and view additional information in the report, such as the deposit slip and the account distribution summary. After you define the filters, click **View Report**.

***Note:*** When you select to group your deposits by day, all deposit information is separated by date.

With *Multicurrency*, when a deposit process includes payments with multiple currencies, the deposit process automatically creates separate deposits for each type of currency. The deposit summary report displays the payments in a deposit and groups them according to the payment's currency. When multiple currencies are included in the report, the report total displays "N/A."

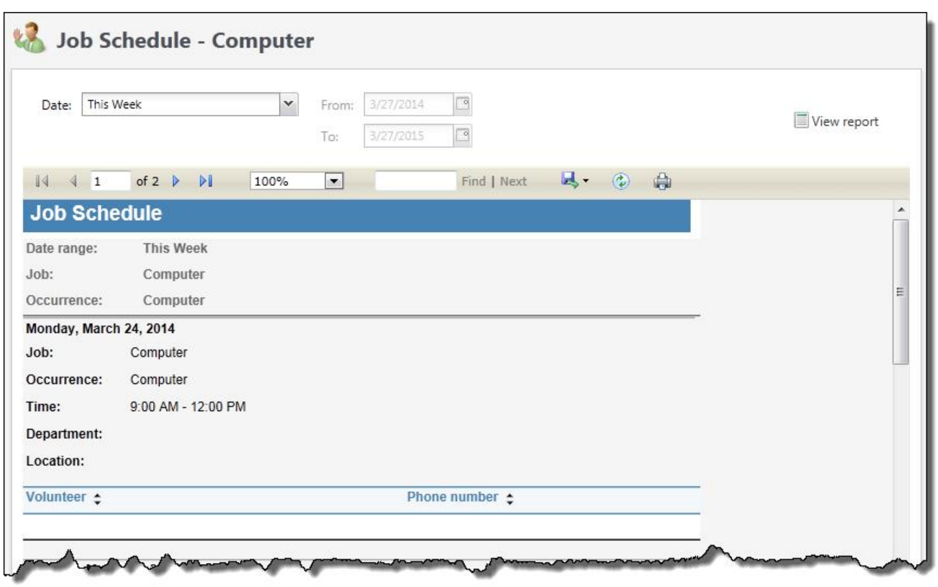
# Volunteer Reports



With volunteer reports, you can track information for a specific volunteer or job. These reports help you maximize the efficiency of your volunteer program by matching assignment needs with volunteers who have the right skills, availability, and experience. With volunteer reports, you can generate and print schedules for all jobs, a specific job, or a specific volunteer. You can generate and print daily schedules and export to a variety of file types. With volunteer reports and schedules, you can maintain a well-organized volunteer program.

## Job Occurrence Schedule Report

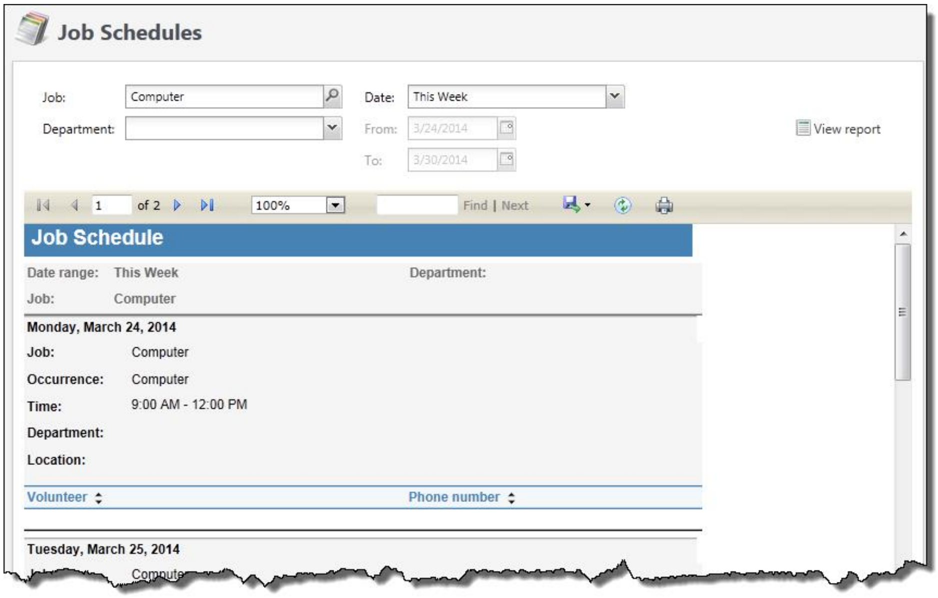
The Job occurrence schedule report displays all dates and assigned volunteers for a selected job. You can indicate a specific date range, such "This week," for a report.



To run this report, from *Volunteers*, click **Job occurrence** under **Reports**. You can view the report from the job record or from the Job schedule page. If you access the report from Volunteers, you are prompted to select the job to use. On the report, you can select a date range to filter the results. Click **View report** to generate the report.

# Job Schedules Report

The Job schedules report displays all occurrences of all jobs in the date range and department you select. You can also select a specific job for the report. The report includes the name, date, and time of the job. It also includes the job occurrence, department, and location.

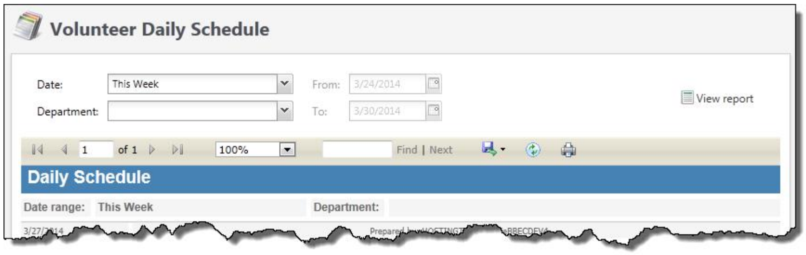



To run this report, from *Volunteers*, click **Job schedules** under **Reports**. You can select the job to view, as well as a date range to filter the results. If you do not select a specific job, the report includes all jobs for the date range and department specified.

# Volunteer Daily Schedule Report

The Volunteer Daily Schedule report displays all assignments for the selected day or date range. It includes the name of each volunteer and the job assigned to each volunteer. It also includes the start time, end time, and department for the assignment.

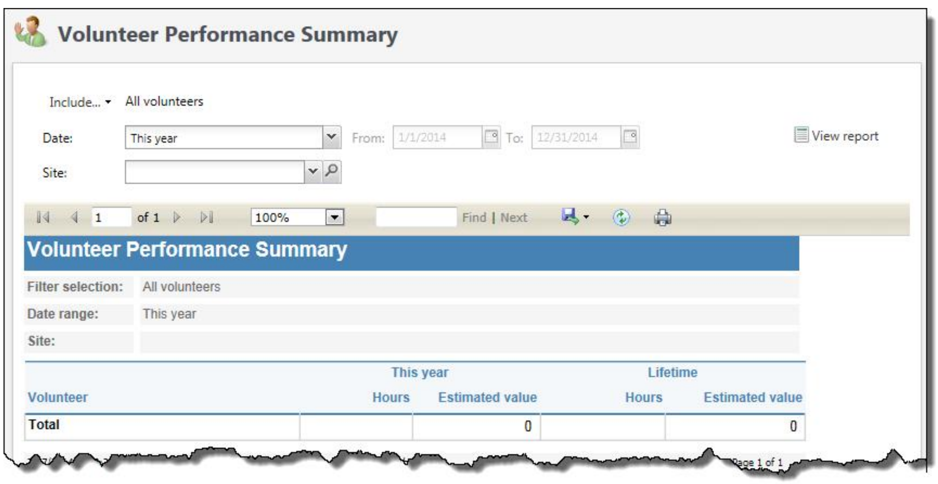
***Note:*** If a job is scheduled for the selected day, but no volunteer is assigned to the job, the report will not generate. The Daily Schedule Report displays assignments only.




To run this report, from *Volunteers*, click **Volunteer daily schedule** under **Reports**. You can select the date or date range to filter the results. You can also select a department to filter the results.

# Volunteer Performance Summary Report

The Volunteer Performance Summary report displays information about a volunteer's activity with your organization for a selected time period and over the volunteer's lifetime with your organization. To access this report from *Volunteers*, click **Volunteer performance summary** under **Reports**.

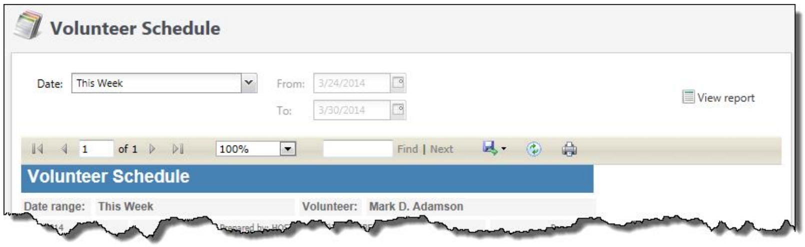



To run the report, select the volunteers and date range to include in the report and click **View report**. You can include all volunteers, a volunteer selection created in *Query*, or a specific volunteer.

The report displays the hours worked by each volunteer for the selected date range and over the lifetime with your organization. For each time period, you can also view the estimated value of the volunteer, based on the jobs the volunteer performed and the hours worked. The program automatically calculates these values based on the timesheets entered for the volunteer and the estimated values of the jobs.

# Volunteer Schedule Report

The Volunteer Schedule report displays a schedule for a specific volunteer. You select the date range for which to generate a schedule. The schedule includes the date and time of each volunteer assignment and includes the occurrence and location for each job.




To run this report, from *Volunteers*, click **Volunteer schedule** under **Reports**. You can select a date range to filter the results. You can also access the report from volunteer when you click **View schedule**.