DONNA MITCHELL

TRAINING SPECIALIST

Filters and Reports

~How to Become an Expert in 60 Minutes

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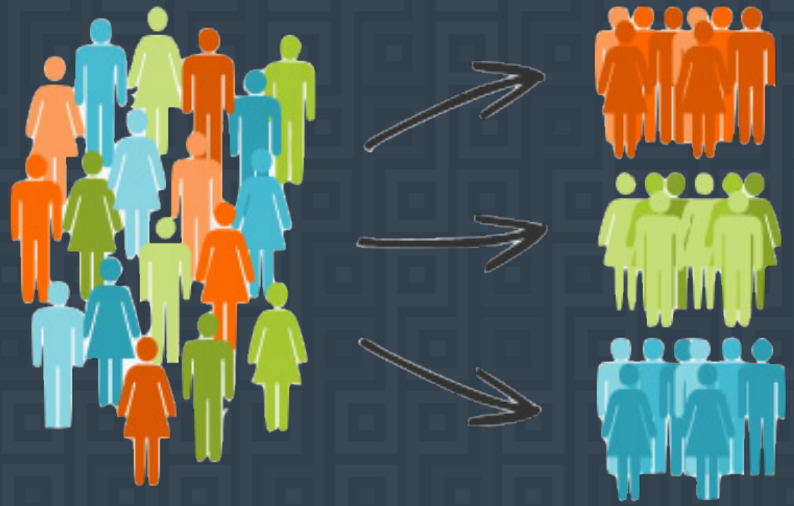
AGENDA

- What is a Filter?
- Filter vs. Report
- Types of Filters
- Building Filters Tips
- Report Types
- Report + Filter = TARGETED RESULTS!

What is a Filter?



What is a Filter?

Subset of your database

Pulls specific records

Targeted Results

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Filter vs. Report

Filter vs. Report

Filter

The "Who"

- Not the entire database

Which Gifts

Donors/Constituents

SideBar or Selection Filters

Report

The "What"

- Data Included

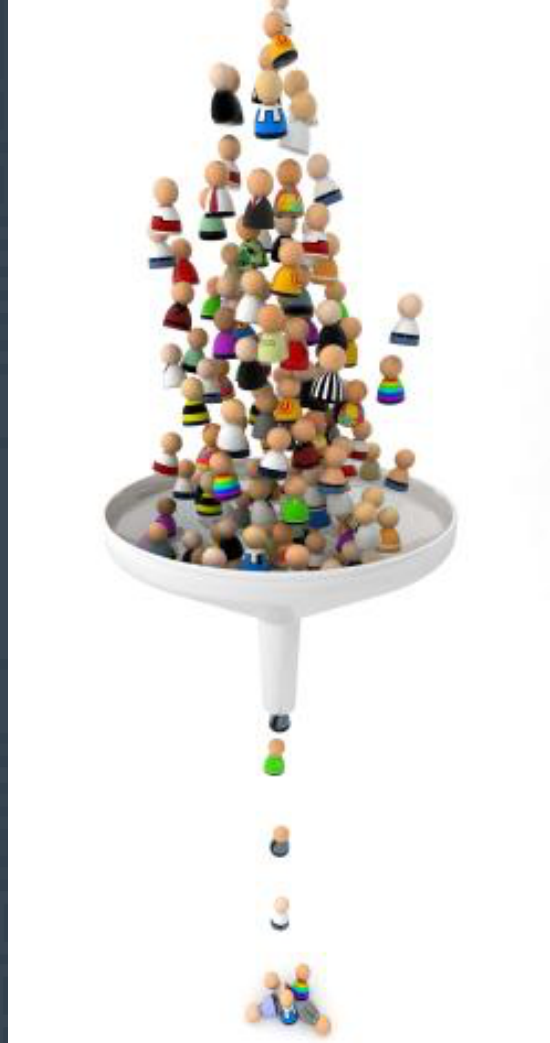
Subtotals and Totals

Format

Layout

Groupings

Types of Filters



Selection Filters

Multiple Criteria

Combined with

"***and***" or "***or***"

Can be saved

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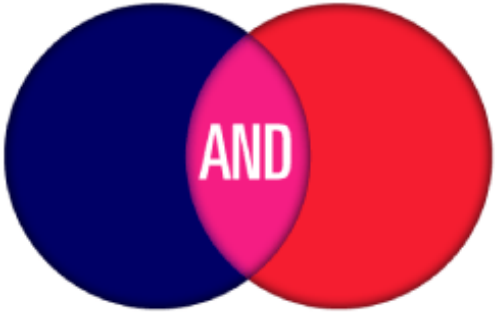
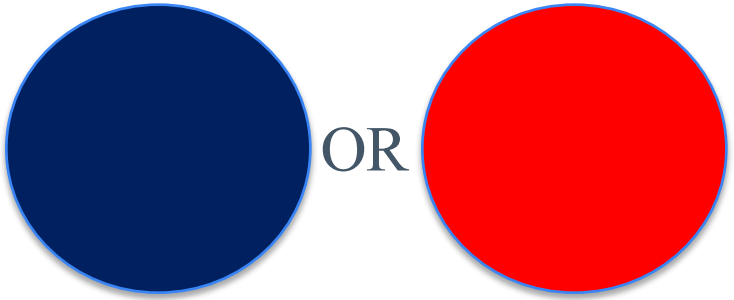
Combining Criteria



Needs to meet ALL criteria
Smaller result



Meets any ONE of the criteria
Or gives you more

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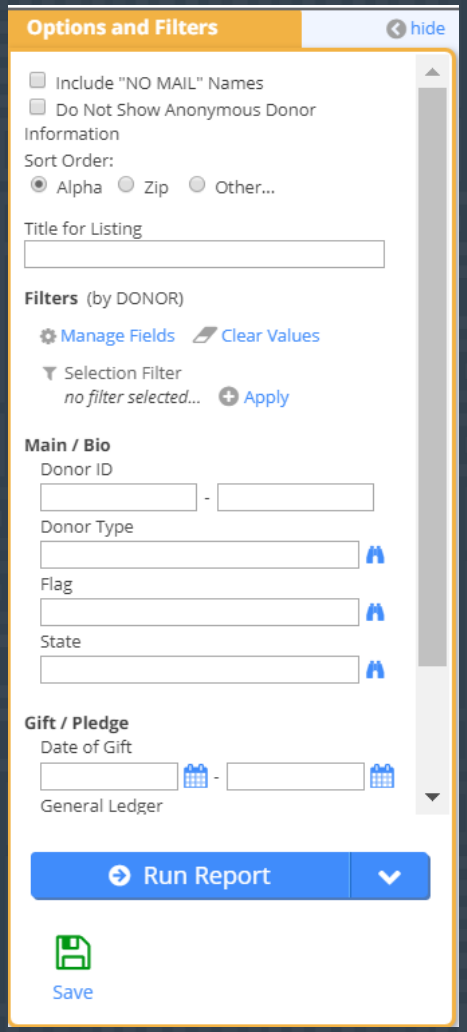

SideBar Filter

Report Filters and Options

- Sort Order
- Include “NO MAIL” names
- Gift Dates

“*and*” and “*or*” available

Manage Fields

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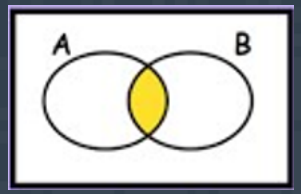
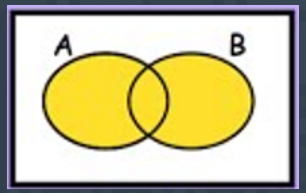
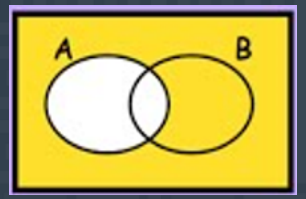
Compound Filter



Intersection
AND



Union
OR



Minus
SUBTRACT

Uses saved Selection Filters

Allows for an "***and***" and an "***or***"

Subtract a set of criteria from another

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Building Filters Tips

Building Filters Tips

Which Records?
- Donors
- Specific Gifts
- Constituents with Flags

Field Type
- Date
- Currency
- Coded
- Text

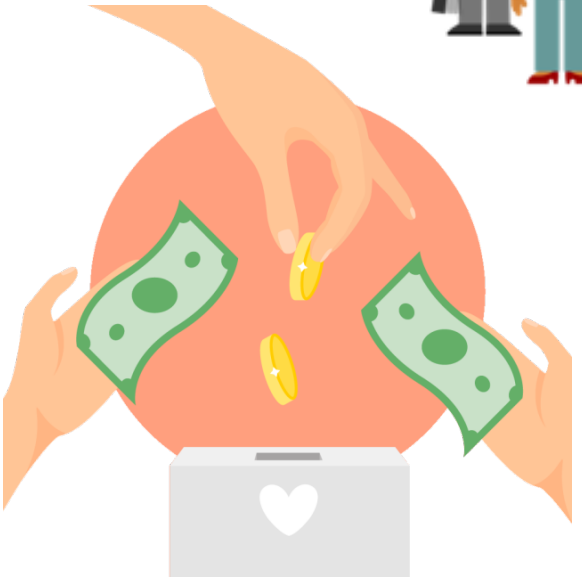
Field Name
- Which screen?
- Field Name (database)
- Prompt (screen name)

Comparison Operator
- Equal to
- Greater than
- Less than or equal to
- Between
- Is/Is Not Null

Which Records?

Write in plain language

- All donors last fiscal or calendar year
- All donors who have given in the last three calendar years
- All gifts to 2019 Annual Appeal



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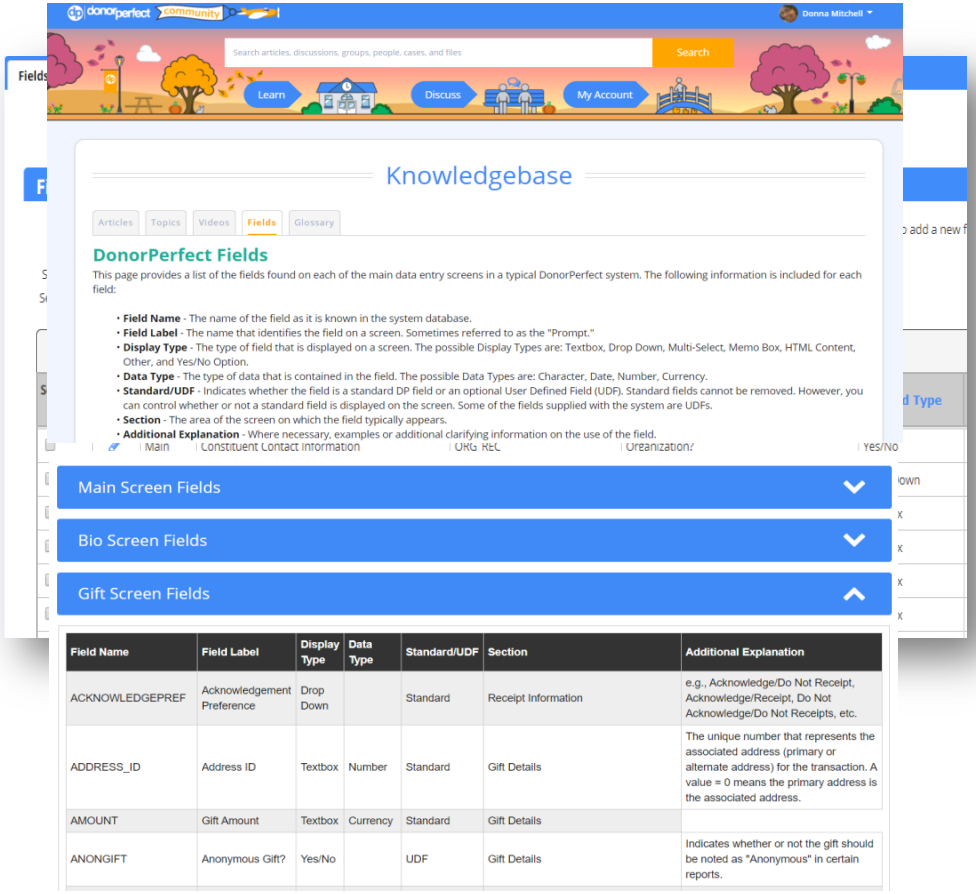
Which Field



Know Your Fields

Screen Designer

[DonorPerfect Knowledgebase]

Field Name = Database name **Donor_Type**

Field Prompt = Screen name **Donor Type**

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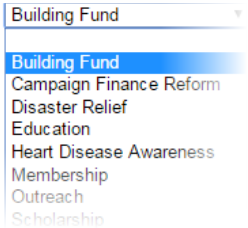
Field Type

Date
Gift Date
Created Date
Last Gift Date

Numeric
Gift Amount
Balance
Last Gift Amount

Coded Text
Donor Type
General Ledger
Solicitation



Non-Coded Text
Last Name
Memo Fields
Address

Knowing the type of field determines the correct operator

Comparison Operator

BETWEEN

How to search for data

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Time for a Demonstration

Report Types

DonorPerfect Reports

Listing Reports

- Constituents/Donors
- Excludes records marked as *Do Not Mail*
  - Default for mailings
  - Include for true giving history
- Can be exported

Financial Reports

- Gifts/Pledges
  - Totals
  - Sub-totals
  - Segmentation
- Giving Trends
- Financial Health
- Includes No Mail Records

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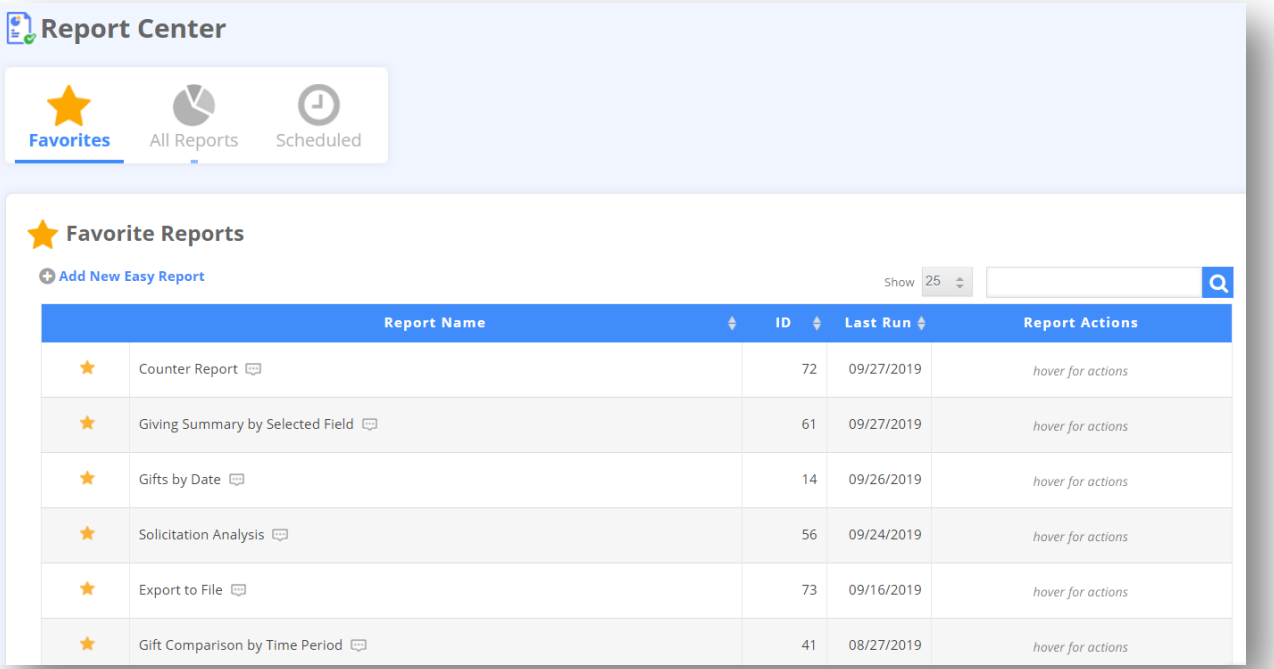


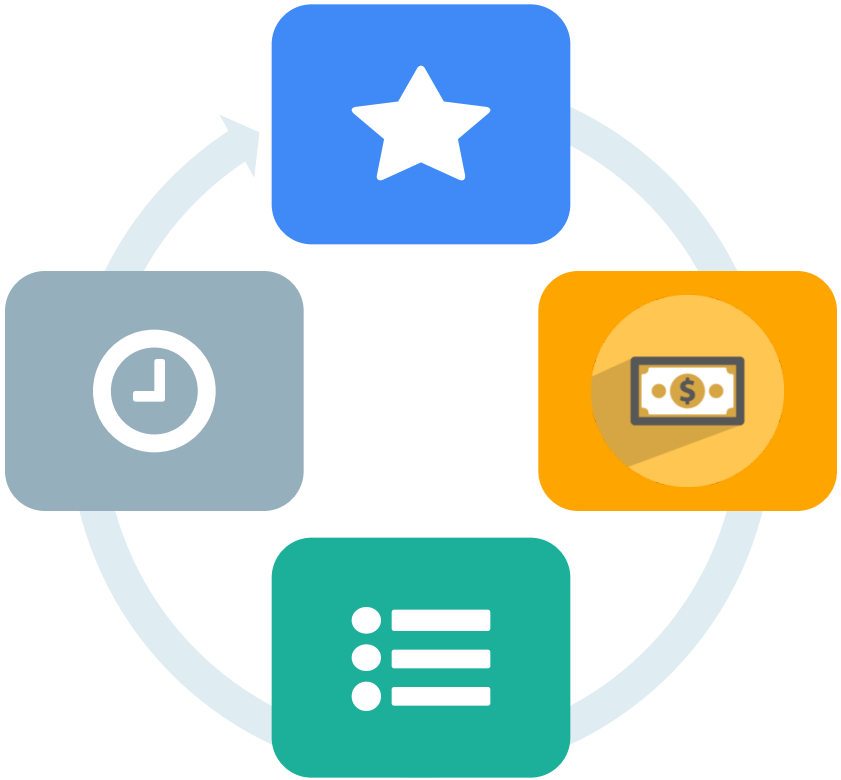
Report Center

Hub for All Reports

Report Center

Favorites
All Reports
- Financials
- Listings

Scheduled Reports



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Which report shows giving weekly, monthly, quarterly or annually segmented by field?

A. Cross Tabulation

B. Month and Year to Date Summary

C. Gift Comparison by Time Period

D. Solicitation Analysis

What Do You Think?

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Which report shows giving weekly, monthly, quarterly or annually segmented by field?

C. Gift Comparison by Time Period

What Do You Think?

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Which report shows a donor's cumulative giving history, Flags, Contacts, Gifts and Pledges, etc.?

A. History List

B. Giving History with Complete Donor Profile

C. Giving Statement

D. Donors by Giving Level

What Do You Think?

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Which report shows a donor's cumulative giving history, Flags, Contacts, Gifts and Pledges, etc.?

B. Giving History with Complete Donor Profile

What Do You Think?

Which report shows your ROI for events and appeals?

A. General Ledger Analysis

B. Income Analysis with Gift Splits

C. Sub-solicitation Analysis

D. Solicitation Analysis

What Do You Think?

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Which report shows your ROI for events and appeals?

D. Solicitation Analysis

What Do You Think?

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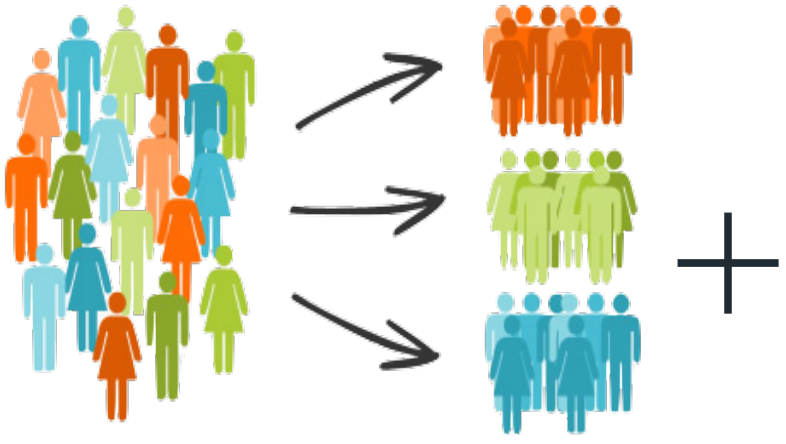
Time for a Demonstration



Giving History with Complete Donor Profile

Constituent Information

Prof. Title: Vice President
The ABC Co (1036)
Jack Jones
29 Main Street
Suite 190
Philadelphia, PA 19044

Home Phone:
Business Phone: (789) 159-3247
Mobile Phone:
Fax: (789) 159-3200
Email: jack.jones.test@aol.com
Flags: ASTEST/GOLF/MD/VIP
Donor ID: 1036
Created Date: 4/24/2017

Cumulative Giving History

Fiscal Year-To-Date: $665.00
1 Year ago YTD: $11,550.00
2 Years ago YTD: $885.00
3 Years ago YTD: $0.00
4 Years ago YTD: $0.00

Initial Gift Date: 8/24/2017
Last Gift Date: 10/3/2019
Largest Gift: $10,000.00
Grand Total: $13,100.00
Number of Gifts: 35

Filter(s) + Report =

THE RESULTS YOU WANT TO SEE

QUESTIONS?

Thank You!

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