



DONNA MITCHELL



TRAINING SPECIALIST

# Filters and Reports

~How to Become an  
Expert in 60 Minutes



# AGENDA

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



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# 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

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## 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





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# Types of Filters



# Selection Filters

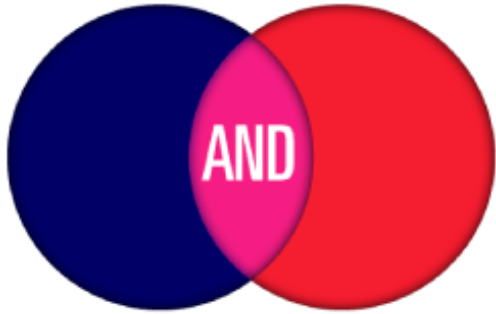
Multiple Criteria  
Combined with

*“and”* or *“or”*

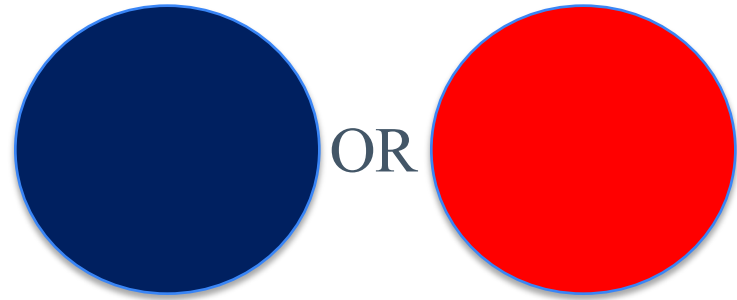
Can be saved



# Combining Criteria



Needs to meet ALL  
criteria  
Smaller result



Meets any ONE of the  
criteria  
Or gives you more

**Options and Filters** hide

Include "NO MAIL" Names  
 Do Not Show Anonymous Donor Information

Sort Order:  
 Alpha  Zip  Other...

Title for Listing

**Filters** (by DONOR)  
[Manage Fields](#) [Clear Values](#)

Selection Filter  
no filter selected... [Apply](#)

**Main / Bio**  
Donor ID  
 -   
Donor Type  
   
Flag  
   
State

**Gift / Pledge**  
Date of Gift  
 -    
General Ledger

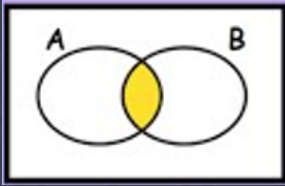
[Run Report](#)

Save

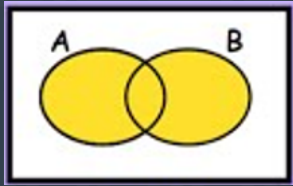
# SideBar Filter

Report Filters and Options  
Sort Order  
Include "NO MAIL" names  
Gift Dates  
"and" and "or" available  
Manage Fields

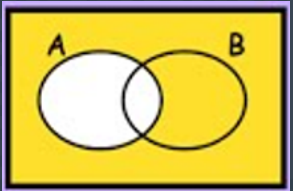
# Compound Filter



**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

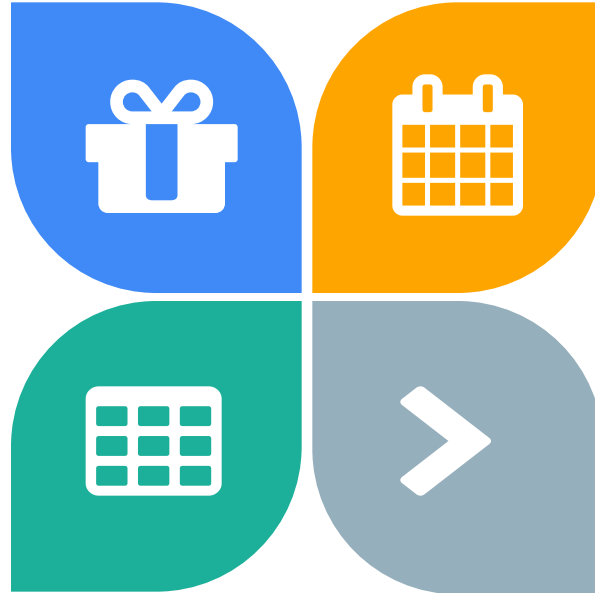
# Building Filters Tips

## Which Records?

- Donors
- Specific Gifts
- Constituents with Flags

## Field Name

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



## Field Type

- Date
- Currency
- Coded
- Text

## 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



# Which Field

## Know Your Fields

Screen Designer

[DonorPerfect Knowledgebase](#)

Field Name = Database name  
**Donor\_Type**

Field Prompt = Screen name  
**Donor Type**

**DonorPerfect Fields**

This page provides a list of the fields found on each of the main data entry screens in a typical DonorPerfect system. The following information is included for each field:

- Field Name** - The name of the field as it is known in the system database.
- Field Label** - The name that identifies the field on a screen. Sometimes referred to as the "Prompt."
- Display Type** - The type of field that is displayed on a screen. The possible Display Types are: Textbox, Drop Down, Multi-Select, Memo Box, HTML Content, Other, and Yes/No Option.
- Data Type** - The type of data that is contained in the field. The possible Data Types are: Character, Date, Number, Currency.
- Standard/UDF** - Indicates whether the field is a standard DP field or an optional User Defined Field (UDF). Standard fields cannot be removed. However, you can control whether or not a standard field is displayed on the screen. Some of the fields supplied with the system are UDFs.
- Section** - The area of the screen on which the field typically appears.
- Additional Explanation** - Where necessary, examples or additional clarifying information on the use of the field.

Field Name	Field Label	Display Type	Data Type	Standard/UDF	Section	Additional Explanation
ACKNOWLEDGEPREF	Acknowledgement Preference	Drop Down		Standard	Receipt Information	e.g., Acknowledge/Do Not Receipt, Acknowledge/Receipt, Do Not Acknowledge/Do Not Receipts, etc.
ADDRESS_ID	Address ID	Textbox	Number	Standard	Gift Details	The unique number that represents the associated address (primary or alternate address) for the transaction. A value = 0 means the primary address is the associated address.
AMOUNT	Gift Amount	Textbox	Currency	Standard	Gift Details	
ANONGIFT	Anonymous Gift?	Yes/No		UDF	Gift Details	Indicates whether or not the gift should be noted as "Anonymous" in certain reports.

# Field Type

## Date

Gift Date

Created Date

Last Gift Date



## Numeric

Gift Amount

Balance

Last Gift Amount

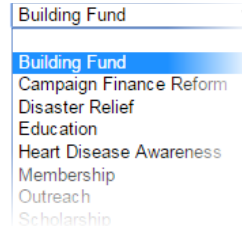


## Coded Text

Donor Type

General Ledger

Solicitation



## Non-Coded Text

Last Name

Memo Fields

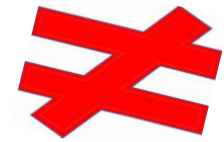
Address



Knowing the type of field determines the correct operator



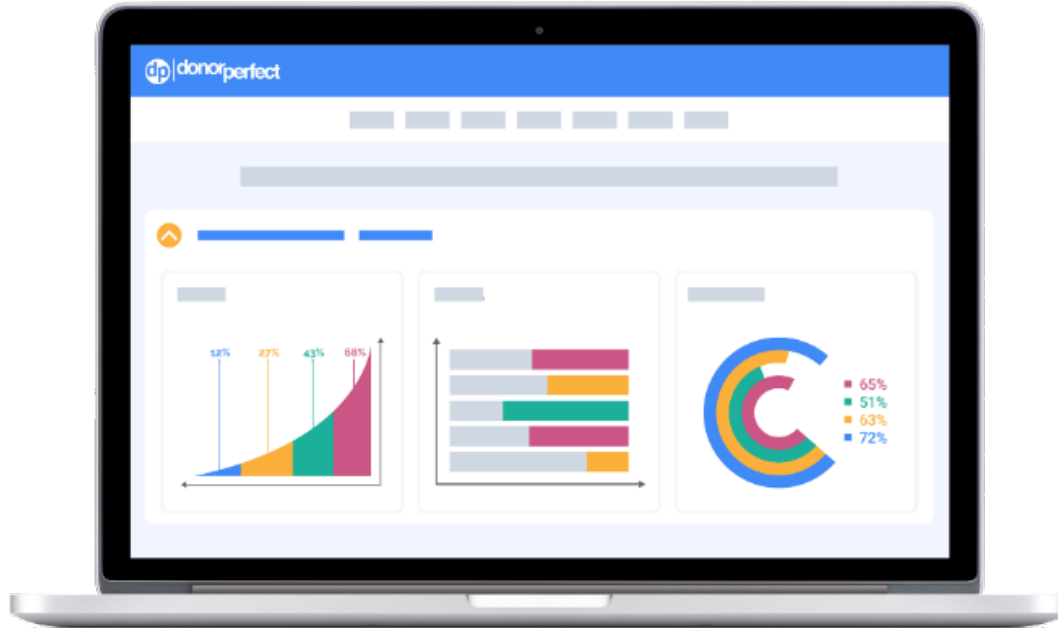
# Comparison Operator



**BETWEE**  
**N**

How to search for data

# Time for a Demonstration





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# 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

## Report Center



Favorites



All Reports



Scheduled

### ★ Favorite Reports

+ Add New Easy Report

Show 25



	Report Name	ID	Last Run	Report Actions
★	Counter Report	72	09/27/2019	<i>hover for actions</i>
★	Giving Summary by Selected Field	61	09/27/2019	<i>hover for actions</i>
★	Gifts by Date	14	09/26/2019	<i>hover for actions</i>
★	Solicitation Analysis	56	09/24/2019	<i>hover for actions</i>
★	Export to File	73	09/16/2019	<i>hover for actions</i>
★	Gift Comparison by Time Period	41	08/27/2019	<i>hover for actions</i>

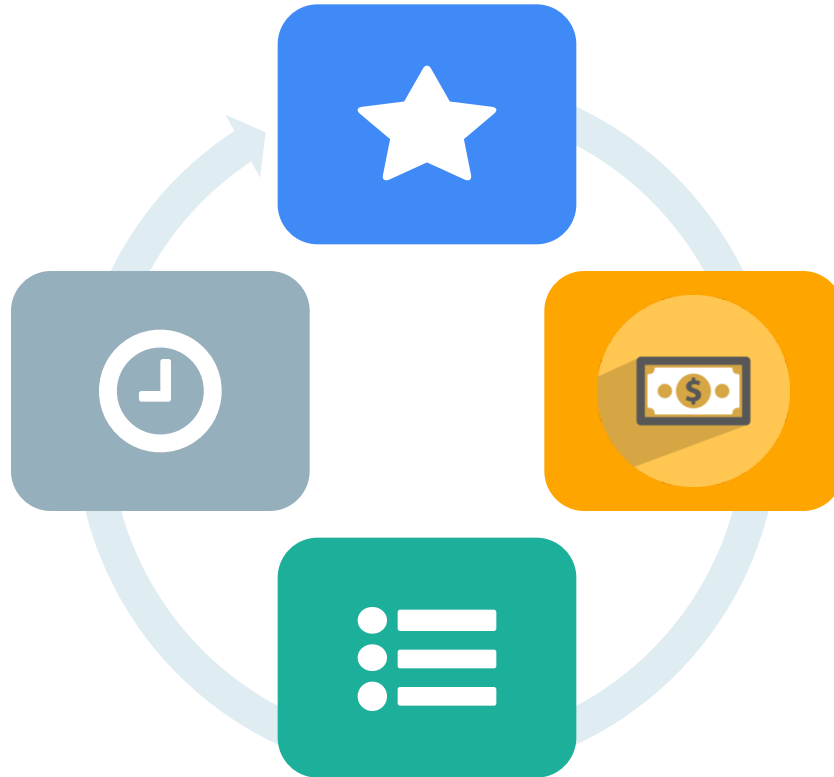
# Report Center

Hub for All Reports

# Report Center

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- Favorites
- All Reports
  - Financials
  - Listings
- Scheduled Reports



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?

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

C. Gift Comparison by Time Period



What Do You Think?



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?

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?

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- A. General Ledger Analysis
- B. Income Analysis with Gift Splits
- C. Sub-solicitation Analysis
- D. Solicitation Analysis



## What Do You Think?

Which report shows your ROI for events and appeals?

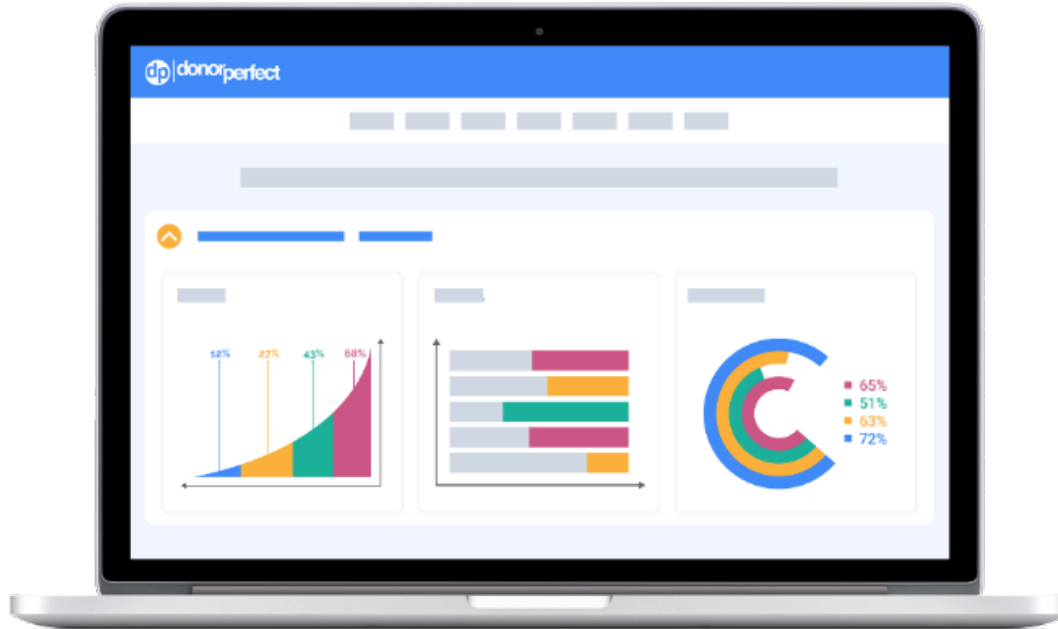
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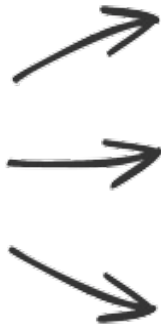
## D. Solicitation Analysis



What Do You Think?

# 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	Initial Gift Date: 8/24/2017
1 Year ago YTD: \$11,550.00	Last Gift Date: 10/3/2019
2 Years ago YTD: \$885.00	Largest Gift: \$10,000.00
3 Years ago YTD: \$0.00	Grand Total: \$13,100.00
4 Years ago YTD: \$0.00	Number of Gifts: 35

Filter(s) + Report =

THE RESULTS YOU WANT TO SEE

**QUESTIONS?**

**Thank You!**





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