

SmartAnalytics Reports

Go beyond basic reporting with charts, graphs, and gauges that bring your data into focus and make trends easy to understand.

**All names, numbers, and details in this guide are fictitious and for demonstration purposes only.*

Get a clear view of your fundraising performance and progress! Our ready-made report templates are built with fields carefully selected according to nonprofit best practices and trusted by thousands of fundraisers. They're designed to be used as provided; any changes should be requested before setup or training.

Gift and pledge transaction reports

1. [Gift Details](#) – Support acknowledgments and reconciliation efforts by reviewing gifts or pledges with donor, date, amount, and campaign details
2. [Campaign Initiative Comparison](#) – Reveal your strongest appeals and events by evaluating performance across initiatives within a campaign

Gift and pledge summary reports

3. [Year-Over-Year Comparison](#) – Spot giving trends by comparing totals from the current year to previous years, using calendar or fiscal year

4. [Goal Progress by General Ledger Code](#) – See which programs are ahead or behind by tracking year-to-date giving against goals by General Ledger code
5. [Year and Month Comparison](#) – Track momentum and adjust as needed by viewing this year versus last year (calendar or fiscal) and this month versus last month
6. [Multi-Year Goal Progress](#) – Assess long-term growth by reviewing yearly fundraising goals against actual results

Staff engagement reports

7. [Monthly Touchpoints by Solicitor](#) – Identify outreach patterns and guide coaching by tracking solicitor activity across months
8. [Touchpoint Summary by Solicitor](#) – See at a glance which team members are engaging donors most
9. [Meeting Summary by Staff Member](#) – Ensure effective follow-up by monitoring completed donor meetings by staff member

10. [Pipeline Summary by Status](#) – Track where prospects and donors stand in your cultivation process to strengthen relationships and guide next steps
11. [Development Pipeline Summary](#) – Monitor team activity and projected asks for forecast revenue and support major gift planning

Goal tracking reports

12. [New Donors Gauge](#) – Stay focused on growth by measuring progress toward your new donor acquisition goal
13. [Fundraising Goal Thermometer](#) – Inspire action by tracking overall progress toward your annual fundraising goal

Gift and pledge transaction reports

Gift Details

Name	Date of Gift	Gift Amount	Campaign	General Ledger	Solicitation
The Acme corporation	06/01/2022	\$50.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Erica Adams	06/01/2022	\$550.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
James Adams	06/01/2022	\$70.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Adams McKinley Corporation	06/01/2022	\$430.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Miriam Adkins	06/01/2022	\$300.00	Annual Fund	Events	Annual Appeal 2022
Robert & Susan Adkins	06/01/2022	\$150.00	Annual Fund	Events	Annual Appeal 2022
Robert & Susan Adkins	06/01/2022	\$150.00	Annual Fund	Events	Annual Appeal 2022
Aetna Health Management	06/01/2022	\$90.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Steven Agarwal	06/01/2022	\$100.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
The Anna E. Walloe Foundation	06/01/2022	\$170.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Archbishop Wood	06/01/2022	\$550.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Henry Arnold	06/01/2022	\$190.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Mikki Aubrey	06/01/2022	\$339.25	Annual Fund	Gooley Campaign	Gooley Campaign 2022
Michele Aubrum	06/01/2022	\$100.00	Annual Fund	Gooley Campaign	Gooley Campaign 2022

Review a detailed, row-by-row list of individual gifts or pledges using the fields you choose and applying filters to focus on specific donors, campaigns, or funds.

Use it to:

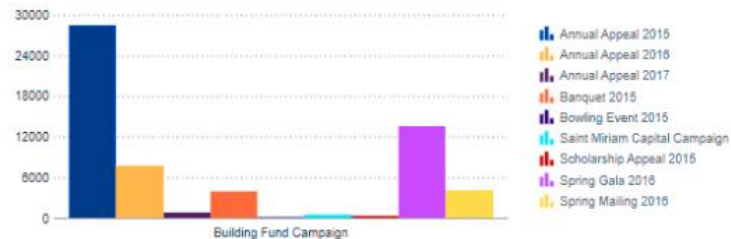
- Verify recent donations, pledges, pledge payments, or soft credits
- Export gift records for audits or reconciliation
- Analyze campaign, fund, or donor trends and identify data issues

2. Campaign Initiative Comparison

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Campaign Analysis Report

	Number of Gifts	Total Gift Amount
Building Fund Campaign		
Annual Appeal 2015	75	\$28,429.32
Annual Appeal 2016	52	\$7,665.30
Annual Appeal 2017	9	\$819.00
Banquet 2015	5	\$3,925.00
Bowling Event 2015	2	\$150.00
Saint Miriam Capital Campaign Mailing 2017	1	\$500.00
Scholarship Appeal 2015	1	\$250.00
Spring Gala 2016	11	\$13,500.00
Spring Mailing 2016	2	\$4,100.00
Total: Building Fund Campaign		\$59,338.62
Grand Total:		\$59,338.62



Break down campaign results by appeal or event with subtotals for each initiative, making it easy to see which efforts are performing best and where adjustments may be needed.

Use it to:

- Compare performance across appeals and events within a campaign
- Identify your strongest and weakest fundraising strategies
- Share clear snapshots with staff and board members

Gift and pledge summary reports

3. Year-Over-Year Comparison



View giving totals from the current fiscal or calendar year versus the previous fiscal or calendar year in a clear bar chart. Results can be grouped by a key field (such as General Ledger Code) and added to your DonorPerfect dashboard for easy, real-time tracking.

Use it to:

- Visualize year-over-year changes in giving by key fields like General Ledger Code
- Identify high- or low-performing campaigns or programs
- Share progress toward annual fundraising goals with staff and board

4. Goal Progress by General Ledger Code

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General Ledger	Goal	Raised-To-Date	Goal Reached	No. of Donors
	Not Found	\$235.00	0.00%	4
Building Fund	\$1,000	\$69,894.00	6989.40%	89
Endowment Fund	\$1,000	\$126,568.53	12656.85%	279
Events	\$1,000	\$146,797.00	14679.70%	60
Gooley Campaign	Not Found	\$30,772.21	0.00%	109
Membership	\$1,000	\$13,350.00	1335.00%	8
Operating Fund	\$1,000	\$36,625.00	3662.50%	84
Restricted Contributions	\$1,000	\$192,466.30	19246.63%	278
Scholarship Fund	\$1,000	\$22,205.00	2220.50%	27
Unrestricted Contributions	\$1,000	\$218,829.97	21883.00%	301
Total	\$10,000.00	\$857,743.01	8577.43%	

Track year-to-date fundraising against set goals, showing totals raised (with or without pledges) and the number of unique donors. Group results by General Ledger Code to understand progress across budget categories, programs, or departments.

Use it to:

- Monitor fundraising performance against General Ledger Code-specific goals
- Identify revenue or donor-count gaps before they impact results
- Compare progress across programs or budget areas to decide where to focus efforts

5. Year and Month Comparison

	July 2025	June 2025	2025	2024
		\$115.00	\$1,343.00	\$205.00
ON - General Fund	\$2,600.00		\$2,700.00	\$1,783.75
Building Fund			\$605.99	\$854.00
Disaster Relief				
Health Programs			\$180.00	
Endowment Fund				\$600.00
School Music Programs			\$1,849.00	\$5.00
Membership				\$18.00
Build my Castle			\$3,023.00	\$9,293.00
Unrestricted		\$1,180.00	\$1,230.00	
Totals	\$2,600.00	\$1,295.00	\$10,930.99	\$12,758.75

Show revenue trends by comparing calendar or fiscal year-to-date totals with the same period last year and monthly results with the prior month. Results can be grouped by Campaign, Solicitation, or General Ledger code for more targeted analysis.

Use it to:

- Track current performance against last year's results
- Monitor monthly giving trends over time
- Catch early gains or declines in campaign or fund performance

6. Multi-Year Goal Progress

	Goal	Raised-To-Date	Goal Reached
2022	\$2,000,000	\$2,978,314.48	148.92%
2023	\$2,500,000	\$729,432.75	29.18%
2024	\$2,500,000	\$1,395,076.48	55.80%
2025	\$3,000,000	\$2,001,567.99	66.72%

Compare fundraising goals and revenue raised across up to four years to get a clear view of long-term performance, goal achievement, and year-to-year progress.

Use it to:

- Evaluate fundraising growth and trends over time
- Compare annual results to fundraising goals
- Highlight multi-year progress in board presentations or annual reports

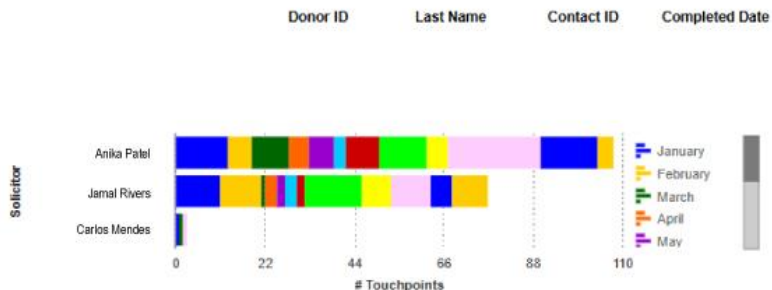
Staff engagement reports

7. Monthly Touchpoints by Solicitor

TW-Touchpoints by Solicitor per Month with Chart

	Donor ID	Last Name	Contact ID	Completed Date
Anika Patel	January			
	5991	Smith Ryan	26654	01/16/2025
	7281	Siep Joe & Mary	26637	01/09/2025
	1798	The Jones Family Foundation	26658	01/17/2025
	586	Chavez Miguel	26635	01/09/2025
	5091	Kumar Priya & Rohan	25557	01/30/2024
	1778	Walker Foundation for Education	25534	01/09/2024
	2753	The Sinclair Fund	26664	01/23/2025
	5895	Adams Dana & Eli	26669	01/22/2025
	6350	Baker Monica	26660	01/21/2025
	1857	The Nasser Family Fund	26673	01/24/2025
	7739	Iverson Mark & Lillian	26634	01/08/2025
	5506	Iverson Mark & Lillian	26656	01/17/2025
	5506	O'Malley Patrick	25540	01/17/2024
13				
February				
2172	The Brighton Giving Circle	25576	02/13/2024	
5183	The Hadid Family Charitable Trust	25569	02/08/2024	

TW-Touchpoints by Solicitor per Month with Chart



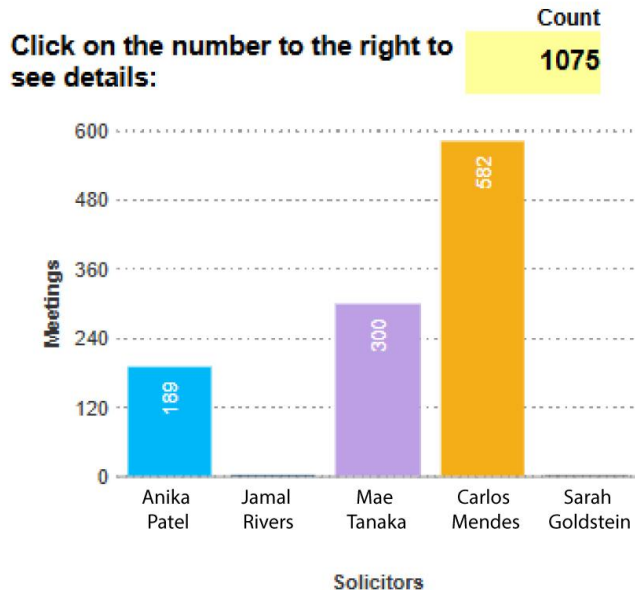
See how many donor touchpoints (completed contact transactions) each assigned solicitor has each month. Results are displayed in both a table and a chart, helping you quickly identify engagement patterns and compare staff activity.

Use it to:

- Track solicitor outreach patterns throughout the year
- Compare monthly activity across staff to highlight strengths and gaps
- Support performance reviews and coaching with clear engagement data

8. Touchpoint Summary by Solicitor

Touchpoints (ALL) YTD



Get a quick snapshot of donor outreach by solicitor with a bar graph that shows the total number of completed touchpoints for each staff member. Only touchpoints with both a completed date and assigned solicitor in the current fiscal year are included.

Use it to:

- Monitor solicitor activity and donor outreach
- Track relationship-building progress over time
- Share engagement metrics with leadership and development teams

9. Meeting Summary by Staff Member

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of Meetings by Staff Member

Staff Member	# of Completed Contacts
Anika Patel	78
Jamal Rivers	22
Mae Tanaka	1
Carlos Mendes	80
Sarah Goldstein	1
Noah Whitaker	75
Elise Romero	1
Tariq Hassan	3

Total Contacts Completed 261

of Meetings by Staff Member

Staff Member	Donor ID	Donor Name	Completed Date	Contact Notes
Elise Romero	10114	Sylvia Greene	11/15/2024	- Phone call w/ Sylvia - She appreciated personal outreach - She felt confident her giving is making an impact - Not attending events this season (not feeling well) but open to virtual tour of youth center - Interested in helping w/ things she can do from home, possibly phone calls
Elise Romero	3995	Priya & Rohan Kumar	12/10/2024	- Zoom meeting to introduce new STEM program - Priya joined ~15 min late, was finishing up w/ a patient - Both were very engaged - Asked great Qs about student outcomes - Rohan shared personal mentorship story, may want to meet a student - Considering named gift: his role as prof, her role as doctor could tie in
Elise Romero	3487	Walker Foundation for Education	11/29/2024	- Intro meeting w/ new program officer (Eric) on grant change process - He seemed distracted/frustrated - Said grant cycle is changing due to funding shifts - Agrees our work aligns w/ their initiatives but many orgs are competing - Asked for brief summary of our programs to share w/ supervisor - Will monitor their website for grant cycle updates

Track completed donor meetings by staff member with a summary table. Click on the totals to view meeting details such as donor name, date, and notes, giving you valuable context for follow-up.

Use it to:

- Monitor meeting volume and engagement across staff members
- Drill down into individual contacts for context or next steps
- Support Moves Management, Donor Journeys, pipeline reviews, or team meetings

10. Pipeline Summary by Status

Pipeline Summary by Status

Solicitor	Name/Organization	Plan	Gifted Amount	Received Date	Requested Amount
<i>In Process</i>					
KELLY_RAMAGE	Rogers, Susan	Major Donor Prospects	\$0.00		\$10,000.00
			<i>Total: \$0.00</i>		<i>Total: \$10,000.00</i>
<i>Received</i>					
KELLY_RAMAGE	Adams, Erica	Major Donor Cultivation Plan	\$10,000.00	08/29/2025	\$12,000.00
			<i>Total: \$10,000.00</i>		<i>Total: \$12,000.00</i>
			Grand Total: \$10,000.00		Grand Total: \$22,000.00

View your fundraising pipeline organized by status. Subtotals from key fields on the contact record show how many donors or prospects are in each stage, and an optional Moves Management field can be included as a summary metric.

Use it to:

- Monitor where donors and prospects are in your cultivation process
- Support major gift, Donor Journey, and Moves Management strategies
- Share a clear pipeline snapshot with development leadership or your board

11. Development Pipeline Summary

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Development Pipeline Report

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
▶ AmandaTad		\$16,000											\$16,000
▶ Donna Trainer					\$3,000								\$3,000
▶ Kelly_Ramage								\$12,000					\$12,000
													\$31,000

Get a clear view of your team's fundraising pipeline by seeing where each fundraiser is in their planning process. Projected ask amounts for major donors and grant funders help you track progress, forecast giving, and prioritize next steps.

Use it to:

- Monitor pipeline activity across your development team
- Forecast revenue by tracking projected asks for donors and funders
- Guide strategy discussions in team or board meetings

Goal tracking reports

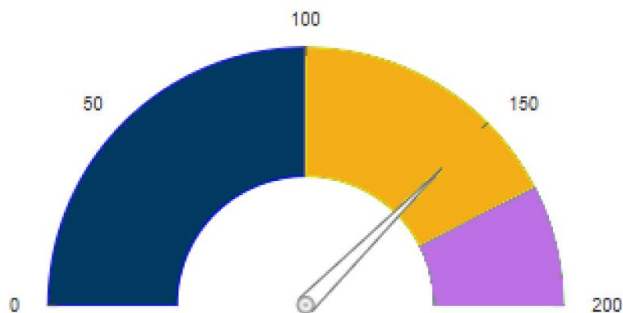
12. New Donors Gauge

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New Donors in 2024 (Goal - 200)

Total YTD Giving:

\$7,972.00



Quickly see progress toward your yearly new donor acquisition goal with a simple, easy-to-read gauge that can be added to your dashboard.

Use it to:

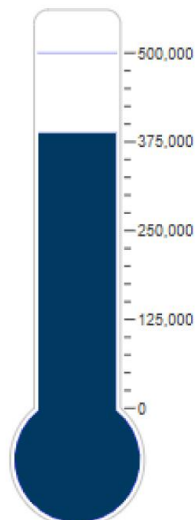
- Monitor progress toward your new donor goal in real time
- Demonstrate donor growth to leadership and your board
- Celebrate milestones and motivate your team to keep going

13. Fundraising Goal Thermometer

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Annual Fund 2024/2025

\$387,829.64



387,829.64

Visualize how close you are to reaching your annual fundraising goal, combining gifts and pledges for a complete picture.

Use it to:

- Track year-to-date fundraising against your annual goal
- Show progress in meetings or donor updates
- Inspire staff, volunteers, and supporters with real-time results