



Training
Webinar



Little Green Light Reporting 101

presented by
Hunter Williams

Q&A with Lisa Lennick





Training
Webinar

Welcome!

**Please tell us where you are calling in
from and how long you've used LGL**

Use the Question box in the
Go to Webinar control panel



Audio Problems?

Audio section



GoToWebinar Control Panel

The screenshot shows the GoToWebinar Control Panel interface. The top section is the 'Audio' section, which is expanded. It shows three radio buttons: 'Computer audio' (selected), 'Phone call', and 'No audio'. Below these is a red microphone icon with the word 'MUTED' in red. A dropdown menu shows 'Yeti Stereo Microphone' selected. Below that is a volume slider and another dropdown menu showing 'Yeti Stereo Microphone'. The bottom section is the 'Handouts' section, which shows 'Handouts: 1 of 2' and 'LGL Basic Training: Reporting 101' with the webinar ID '787-983-283' and the GoToWebinar logo.

Handouts



- make sure computer volume is turned up





Little Green Light Reporting 101

presented by
Hunter Williams

Q&A with Lisa Lennick



Reporting 101 - agenda



Part 1 - March 19

Built-in reporting (point and click)

- Q&A

Part 2 - March 21

Custom reports (build your own)

- Q&A



A quick poll

Have you created donor reports in the past (not just in LGL)?

- Not really, I'm new to reporting on donors
- I've used spreadsheets but not a donor management system
- I've used another donor management system, but not LGL
- I am already using LGL for reporting



First Demo

- Dashboard
 - key widgets (tiles)
 - download all or pieces of dashboard
 - customize display and refresh
 - the new “organization dashboard”
- Funds and Campaigns summary pages
- Fundraising Views
 - Group by constituent and other views



My dashboard

Organization dashboard

Customize Dashboard

▾ Fundraising Totals



Year

Month

Year to date?

	2022	2023	2024
Gifts	235 / \$41,549	61 / \$63,673	22 / \$42,040
In Kind	0 / \$0	1 / \$0	0 / \$0
Other Income	1 / \$50	3 / \$7,100	0 / \$0
Pledges	7 / \$12,901 (\$11,601)	5 / \$4,294.44 (\$3,044)	4 / \$102,000 (\$76,750)
Installments	17 / \$7,107.50	14 / \$6,850	1 / \$1,200

Last updated: March 18, 2024 at 02:14 AM · Refresh



▼ Pledge Summary by Year of Pledge ?



All Open Closed

Pledge Date	Pledged	Received	Write-Offs	Balance
2021 and before	\$127,775	\$71,317.50	\$1,860	\$56,457.50
2022	\$12,901	\$1,300	\$0	\$11,601
2023	\$4,294.44	\$1,250	\$0	\$3,044.44
2024	\$102,000	\$25,250	\$0	\$76,750

Switch to Chart

▼ Donor Summary by Year



2022 2023 **2024** Year to date? ?

	Donors	Total Raised ?	Gifts	Pledges (balance)
First-time Donors	3	\$11,000	\$10,600	\$500 (\$400)
Consecutive year donors	6	\$102,700	\$26,350	\$101,500 (\$76,350)
Recaptured donors	10	\$5,090	\$5,090	\$0 (\$0)
Total	19	\$118,790	\$42,040	\$102,000 (\$76,750)

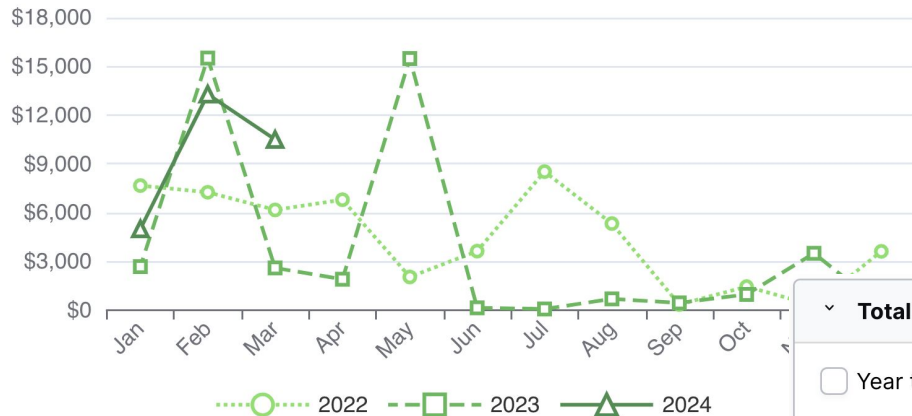
Last updated: March 18, 2024 at 02:14 AM · [Refresh](#)



▼ Total Raised by Month, Year over Year ?



Year to date? ?

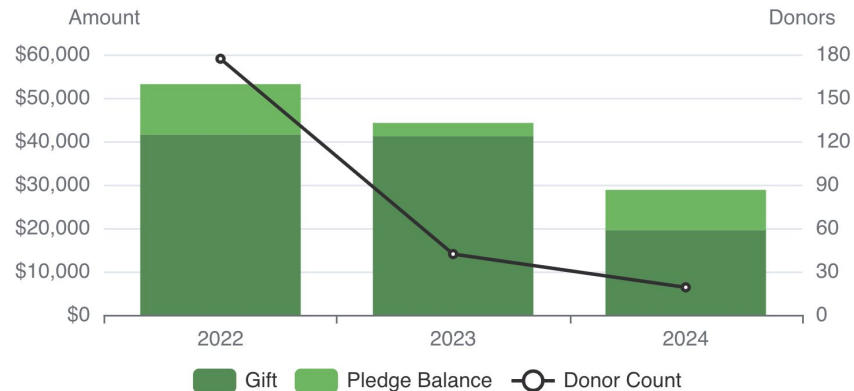


Last updated: March 18, 2024 at 10:26 AM

▼ Total Raised by Type and Year ?



Year to date? ?



Last updated: March 18, 2024 at 10:27 AM · [Refresh](#)



Customize Dashboard

Tiles on your dashboard can be:

- moved
- re-sized
- removed

Each user's selections are just for their own dashboard view


Center House

Home ▾ Constituents ▾ Fundraising ▾ Activity ▾ Mailings ▾ Forms ▾ Settings ▾

Dashboard Team Members Reports My searches Flex Importer

Customize Dashboard Save or cancel


- Check item to add widget to your dashboard.
- Drag and resize widgets to change the display position.
- Click the **x** to remove a widget.
- **Note:** Customizations to the dashboard are not global, and will not change the settings for other team members.
- For more information about how the new dashboard works, read [our knowledge base article on the subject](#).

Constituent Search 

Consecutive Years of Giving


Donors

6+ years	3
5 years	4
4 years	3
3 years	3
2 years	20
1 year	157

Last updated: March 15, 2023 at 02:32 AM •  Refresh

remove from view

Donor Summary by Year

2021 2022 2023 Year to date? 




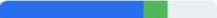


First-time Donors	4
Consecutive year donors	6
Recaptured donors	2
Total	12

re-size

Membershin Summary



Fundraising > Funds

Fund ▼		Code	Campaign	Status	Progress
Annual Fund Campaign: Annual Giving	 Actions		Annual Giving	<input checked="" type="checkbox"/> Active	Total Raised vs. Target/Goal  Target/Goal ? \$124,776.44 of \$150,000 Gifts 483 / \$113,776.44 from 305 Constituent(s) Pledges (balance) 10 / \$14,300 (\$11,000) from 10 Constituent(s) In Kind 2 / \$225 from 2 Constituent(s)
Housing Fund Campaign: Programs	 Actions		Programs	<input checked="" type="checkbox"/> Active	Total Raised vs. Target/Goal  Target/Goal ? \$77,132 of \$100,000 Gifts 168 / \$66,132 from 71 Constituent(s) Other 1 / \$50 from 1 Constituent(s) Pledges (balance) 5 / \$18,600 (\$11,000) from 5 Constituent(s)
Memorial Fund Campaign: Annual Giving Memorial Fund	 Actions		Annual Giving	<input checked="" type="checkbox"/> Active	Total Raised vs. Target/Goal  Target/Goal ? \$27,112 of \$35,000 Gifts 114 / \$27,112 from 59 Constituent(s) Other 1 / \$25 from 1 Constituent(s)

Fundraising Views (below search area in Fundraising > Giving)

Center House

Hunter Williams

Home ▾ Constituents ▾ Fundraising ▾ Activity ▾ Mailings ▾ Forms ▾ Settings ▾

Giving Campaigns Funds Appeals Events Tributes Acknowledgments QuickBooks Gift Batch

Giving by constituent/year ▾

Results 1 - 50 of 214

1 2 3 4

Constituent	This Fiscal	Last Fiscal	2 FY Ago	3 Year total
Totals	\$1,100	\$77,478	\$64,675	\$143,253
Mostel, Zero	\$0	\$25,000	\$0	\$25,000
Pinter, Harold	\$0	\$14,000	\$0	\$14,000
Arthur, Chet	\$0	\$7,500	\$0	\$7,500
Baker, Tammy	\$0	\$6,600	\$0	\$6,600
Balaski, Lorne	\$0	\$6,500	\$0	\$6,500
Aspen Institute	\$0	\$0	\$5,100	\$5,100
Arts Foundation	\$0	\$0	\$5,000	\$5,000
Aanestad, Tom	\$1,000	\$890	\$2,675	\$4,565
Allard, Tom	\$0	\$0	\$3,600	\$3,600



Fundraising views, cont.

Giving by campaign

Results 1 - 4 of 4

Campaign	Total Raised [?]	Gifts	Pledges	In Kind
Totals	\$198,150	\$198,150	\$0 (\$0)	\$0
Unassigned	\$42,901	\$42,901	\$0	\$0
Annual Giving	\$84,296	\$84,296	\$0	\$0
Capital Campaign	\$44,900	\$44,900	\$0	\$0
Programs	\$26,053	\$26,053	\$0	\$0

Giving by month

Results 1 - 24 of 24

Month	Total Raised [?]	Gifts	Pledges
Totals	\$81,169	\$81,169	\$0 (\$0)
March, 2024	\$10,500	\$10,500	\$0
February, 2024	\$5,390	\$5,390	\$0
January, 2024	\$3,650	\$3,650	\$0
December, 2023	\$200	\$200	\$0
November, 2023	\$3,500	\$3,500	\$0
October, 2023	\$970	\$970	\$0
September, 2023	\$450	\$450	\$0
August, 2023	\$250	\$250	\$0

=> demo



Any clarifying questions?



Second Demo

- Pre-built reports (Spreadsheet and PDF formats)
 - Constituent reports
 - Preview
 - Run (aka “generate export”)
 - Gift reports
 - Other report types



LGL Pre-built Reports (Home > Reports)

- Constituent Reports >
- Gift/Pledge Reports
- Goal Reports
- Contact Rpt. Reports
- Task Reports
- Volunteering Reports
- Volunteer Commitment Reports
- Note Reports
- Comprehensive Export

Reports Archived reports Scheduled reports Archived Scheduled reports

From this page you can build and generate constituent reports. [More info...](#)

+ Build a new report Reorder reports
Lookup reports by name

Full Export -- CSV Preview
An export of all your constituents, with full name information, preferred contact information, giving summaries, constituent categories, and more.
Status: Active ▾ Edit Copy Export

Basic Contact Info -- CSV Preview
An export of basic name and preferred contact information for all of your constituents.
Status: Active ▾ Edit Copy Export

Annual Report Info (Current Year) -- CSV Preview
A report showing constituents who have given in the current fiscal year, showing their



Pre-built report output: spreadsheet, some PDFs

Spreadsheet example

LGL Constituent ID	Constituent Type	Primary Group	First Name	Last Name	Total Gifts this fiscal	Tier	Total Gifts last fiscal
943937	Individual	Land Donor or Prospect	Tom	Aamon	0.0		475.0
944142	Individual		Jessica	Abbott	0.0		700.0
942225	Individual	Board Alumn	Sally	Abreau	0.0		100.0

PDF example

Giving Tier	# of gifts	Total gifts
Totals	35	\$39,740
\$10,001-\$25,000	2	\$32,000
\$501-\$1,000	3	\$3,000
\$251-\$500	4	\$1,820
Up to \$250	26	\$2,920

Coverage dates: 7/1/2023 - 6/30/2024



Pre-built constituent reports in your LGL account

Full Export -- CSV

Basic Contact Info -- CSV

Annual Report Info -- CSV

Email Addresses -- CSV

Phone Numbers -- CSV

Mailing Addresses -- CSV

New donors this year -- CSV

LYBUNT Report -- CSV

SYBUNT Report -- CSV

Total Gifts By Year -- CSV

Total Giving by Year with Tiers * -- CSV

Constituent Relationships -- CSV

Appeal Information -- CSV

Event Information -- CSV

Directory -- PDF

Directory with Gift Summary -- PDF

Constituent Snapshot -- PDF

Constituent Snapshot with Activity -- PDF

* edit Tier break points in Gift Menu Items
(in Settings)



LYBUNT Report (CSV)

Preview report

X C

LGL Constituent ID	Constituent Type	Primary Group	First Name	Last Name	Annual Report Name	Total Gifts this fiscal	Tier	Total Gifts last fiscal
943937	Individual	Land Donor or Prospect	Tom	Aamon	Tom and Sally Aamon	0.0		475.0
944142	Individual		Jessica	Abbott	Jessica and Thomas Abbott	0.0		700.0
942225	Individual	Board Alumn	Sally	Abreau	Sally Abreau	0.0		100.0
941993	Individual	Capital Campaign prospect	Bobby	Abreu	Bobby Abreu	0.0		10.0
72239	Organization	Board Member	Thomas	Smith	Accessible Arts Foundation	0.0		500.0



Directory

(pdf)

Center House

Membership Directory 2020-09-24

Constituent Directory

Printed on: 9/24/20

A

Sally Aamon

Salutation: Sally

2300 Arboretum Dr E
Seattle, WA 98112-2300

Groups: Board Member, Member, Teacher
participant, Sponsor

h: 206-233-3489

h: sally@forth.com

w: sally@goforth.com

Tommy Aaron

Salutation: Tommy

123 Any Street
Seattle, WA 98102

h: 206-233-3489

Larry Appleton and his cousin Balki Bartokomous

Salutation: Larry

711 Calhoun Street
Chicago, IL 60603

Groups: Board Member, Major donor prospect

m: 888-555-0044

h: appleton@perfectstrangers.com

B

Barone

Salutation: Barone

320 Fowler Street
Lynbrook, NY 10020

m: 888-555-0017

h: barone@everybodylovesraymond.com

Baxter family

Salutation: Baxter

123 Marshall Road

m: 888-555-0029

h: baxter@hazel.com



Constituent Snapshot

(pdf)

Center House

Over \$10K donors lifetime

Constituent Profile - Detailed

Printed on: 5/20/21

Individual details: Aamon, Sally

Aamon, Sally
Sally Aamon and Tom Aaron
123 Any Street
Seattle, WA 98102
Home: 206.233.3489
sally@forth.com
tommy@aaronfamily.com

LGL ID
942267
Salutation
Sally and Tom
Alt. Salutation
Sally
Spouse
Tom Aaron

Giving summary

Total \$14,887
Largest \$5,000 gift on 1/31/20
Last \$25 gift on 2/3/21
First \$20 gift on 4/26/19
Gifts 21 / \$14,027
Pledges 1 / \$400 (\$300)
Soft Credits 8 / \$560
Status Active Donor, Top 100 Donor

Event Attendance

Total event count: 2

Most recent event invitations:

- 3/14/21: 2020 NY Virtual Luncheon [Status: Attended 1 time]
- 4/26/19: 2019 Auction [Status: Attended 1 time]

Gift History

Date	Amount	Fund	Appeal
2/3/21	\$25	Annual Fund	
1/14/21	\$45	Annual Fund	
10/13/20	\$50		
7/30/20	\$1,000	Annual Fund	
6/11/20	\$100	Annual Fund	

Next Steps

- [] Jun 15, 2020: Set up follow-up lunch [Hunter Williams]
- [] Apr 20, 2021: follow up that issue [Hunter Williams]

Goals

Not available

Categories

Contact Type

Primary

Groups

Member, Sponsor, Teacher participant

Capacity

Low

Interest

Medium

Communication Tags

N/A



Pre-built gift reports in your LGL account

Gifts this year -- CSV

Deposits for this month -- CSV

Deposits for this month -- PDF

Deposits/Gifts by Fund - this month -- PDF

Deposits/Gifts by Fund - last month -- PDF

Open pledges -- CSV

In kind gifts this year -- CSV

Soft credits this year -- CSV

Full Export -- CSV

In Honor / Memory of last month -- CSV

In Honor / Memory of this month -- CSV

Fund report - This year -- PDF

Fund report - Last year -- PDF

Gifts by Tier - this year -- PDF

Total Giving by Tier - this year -- PDF

In Honor / Memory of last fiscal -- CSV



Gift/Pledge Report: Fund Report

(pdf)

Center House

Deposits/Gifts by Fund - last month 2022-03-24

Gifts by Fund

Printed on: 3/24/22

Summary

Fund	Amount	Deposited Amount
Memorial Fund	\$997 (6 records)	\$997
Total	\$997 (6 records)	\$997

Details

Constituent ID Constituent Name / Address

Gift ID	Gift Type	Campaign	Appeal	Fund	Date	Amount	Deposited Amount
<i>Memorial Fund</i>							
944807		Jack Arnold 124 Bluestone Road Cincinnati, OH 45234					
898182	Gift			Memorial Fund	2/24/22	\$100	\$100
944127		Jim Bowman Acme Construction Aerospace					
898172	Gift			Memorial Fund	2/23/22	\$450	\$450
943657		Tom Hanks					
898187	Gift			Memorial Fund	2/23/22	\$222	\$222
941995		Mike Adams 801 W 12th St Austin, TX 78701-1701					
898152	Gift		#GivingTuesday 2021	Memorial Fund	2/22/22	\$125	\$125
942244		Phoebe Buffay 5 Morton St. Apt. 14. New York City New York (Manhattan) USA New York, NY 10009					
898147	Gift			Memorial Fund	2/21/22	\$50	\$50
942002		Jason Bay New York					
898142	Gift			Memorial Fund	2/2/22	\$50	\$50
Fund totals: 6 gifts						\$997	\$997
All totals: 6 gifts						\$997	\$997

Gifts by Tier - this year

(pdf)

Center House

Giving Tier	# of gifts	Total gifts
Totals	35	\$39,740
\$10,001-\$25,000	2	\$32,000
\$501-\$1,000	3	\$3,000
\$251-\$500	4	\$1,820
Up to \$250	26	\$2,920

Coverage dates: 7/1/2023 - 6/30/2024

=> demo



Question from the Assessment (handout)

What does Total Raised refer to in LGL?

- A. The sum across all gift types.
- B. The sum of cash received.
- C. The sum of cash received plus the balance due on pledges made in the period.
- D. The number of people who raised a paddle at the auction.



Exercise to do in your own LGL account

See giving by constituent last year

- ❑ Click the Fundraising tab in your account (takes you to Fundraising > Giving)
- ❑ Set the Date range to “Last year” (instead of This fiscal)
- ❑ Click on the “Gifts” filter in the top left side
- ❑ Change the View to “Giving by constituent” (right below the search box)

see next slide for a video demonstration



See giving by constituent last year

40 second video demonstration (no sound)

Academy of the Stars Hunter Williams | Refer a friend | My profile | Settings | Help | What's New | Sign out

Home - Constituents - **Fundraising** - Activity - Mailings - Forms - Settings

Search by name, email or ID

Giving Campaigns Funds Appeals Events Tributes Acknowledgments QuickBooks Gift Batches Goals Bulk Edits

Fundraising

+ Add gift + Add goal Export results

Filter Results

- By Gift Type**
 - Contributions
 - Gift 60 / \$63,663
 - In Kind 1 / \$0
 - Other Income 3 / \$7100
 - Pledges
 - Pledge 4 / \$3,850 (\$2,600)
 - Installment 14 / \$6,850
 - Related gifts
 - Soft Credit 7 / \$2,400
 - Peer Credit 1 / \$100
 - In Honor of 1 / \$75
 - In Memory of 3 / \$265
 - Matching 3 / \$1,275
- By Gift Status**
 - Complete (79)
 - Open (18)
- By Category**
 - Donation (48)
 - Recurring (1)

Advanced Search

Show gifts where *No saved searches are available*

All of the following are true

Gift Date to to

Add more criteria - Advanced options

View:

Results 1 - 50 of 97

Gifts 60 \$63,663	Pledged (balance) 4 \$3,850 (\$2,600)	Installments 14 \$6,850	In Kind 1 \$0
-----------------------------	---	-----------------------------------	-------------------------

Constituent	Date	Amount	Details	Type
Showers, April april.showers@nmai.com	Dec 4, 2023	\$200	<input type="button" value="Actions"/>	Campaign Annual Giving Annual Fund

<https://littlegreenlight.wistia.com/medias/2986rra15p>





Training
Webinar



Little Green Light Reporting 101

presented by
Hunter Williams

Q&A with Lisa Lennick





Training
Webinar

Welcome!

Please tell us: Do you use Excel or Google spreadsheets? And how would you rate your level of expertise?

Use the Question box in the
Go to Webinar control panel



Audio Problems?

Audio section



Handouts



GoToWebinar Control Panel

The screenshot shows the GoToWebinar Control Panel interface. The top section is the Audio control panel, which includes a microphone icon, a volume slider, and a dropdown menu for audio source selection. The audio source is currently set to 'Computer audio', and the microphone is muted. Below the audio section is the Handouts section, which shows a list of handouts, including 'LGL Basic Training: Reporting 101' with Webinar ID# 787-983-283. The GoToWebinar logo is visible at the bottom of the interface.

- make sure computer volume is turned up





Little Green Light Reporting 101

presented by
Hunter Williams

Q&A with Lisa Lennick



Reporting 101 - agenda

Part 1 - March 19

Built-in reporting (point and click)

- Q&A



Part 2 - March 21

Custom reports (build your own)

- Q&A



4 steps: LGL Report Builder

1. Search

2. Customize

3. Preview

4. Save Export

let's start at the end ...



Report we want: last year's donors, showing total 2023 giving and last gift

LGL Constituent ID	Sort Name	Pref. Email	2023 Gifts (\$)	Last gift date	Last gift amount
942267	Aamon, Sally	sally@goforth.com	1675.0	2023-11-17	1500.0
942255	Aanestad, Tom	hunterbw@comcast.net	100.0	2023-09-20	100.0
944142	Abbott, Jessica	jessica.abbott@gmail.com	100.0	2023-02-22	100.0
942225	Abreau, Sally	sally@abreau.org	75.0	2023-04-11	75.0
944127	Acme Construction, Aerospace	jim@bowman.com	1200.0	2023-02-03	1200.0
941995	Adams, Mike and Jane	mike.adams-test@gmail.com	125.0	2024-01-05	100.0
944932	Addams, Morticia		300.0	2023-05-02	300.0
945672	Adkins, Tom	tom.a@adkins.org	100.0	2023-11-28	100.0

Two key steps to define report criteria

Build a new report

1. Search

2. Customize

- **Search for the constituents to include**
- **Select the columns of data to include**



DEMO

- **Search** for constituents with gift date = last year
 - and Gift Type = gift
- **Customize** (select) columns for report
 - LGL Constituent ID
 - Sort Name
 - Total Giving (custom) - parameters for LY, gifts
 - Last Gift
- **Save** (generate) Export



1. Search

2. Customize

3. Preview

4. Save Export

+ Add constituent

✉ Send mail

📧 Send email

📄 Export results

Advanced Search

Show constituents where

Saved Searches: ----- My searches ----- ▾

use dropdown to select search field

All of the following are true

Restrict by: Event Appeal

⊗ Gift dates ▾ Last year ▾ last year 📅 to last year 📅

⊗ Gift types ▾ include any ▾ Gift Edit **Status:** Any ▾

[Add more criteria](#) · [Advanced options](#) ⓘ

add add'l search fields | add another search query

🔍 Search

Results 1 - 25 of 40

< 1 2 >

Common search fields

- Names
- First name | Last name
- Employer/organization
- City, State, ZIP/Postal
- Email
- Can send mail / email?
- Groups
- Gift dates
- Total Giving Amt.
- Single gift amount
- Number of gifts

Names - searches all name fields in a record, incl. spouse and salutation

Can use geolocation to select addresses within x miles of city

Excludes deceased, 'do not' mail/email and no valid mail/email



1. Search

2. Customize

3. Preview

4. Save Export

+ Add constituent

✉ Send mail

✉ Send email

📄 Export results

Advanced Search

Click "Export results" to start a report

Show constituents where

Saved Searches: ----- My searches ----- ▾

All of the following are true

Restrict by: Event Appeal

⊗ Gift dates ▾ Last year ▾ last year 📅 to last year 📅

⊗ Gift types ▾ include any ▾ Gift Edit **Status:** Any ▾

[Add more criteria](#) • [Advanced options](#) ⓘ

📄 Save this search [New Search](#)

🔍 Search

Results 1 - 25 of 40

40 constituents in this search result

< 1 2 >

1. Search

2. Customize

3. Preview

4. Save Export

In this step, we will select fields for the report

1. Search

2. Customize

3. Preview

4. Save Export

Cancel

Ready to export **40** constituents. Add/remove in the Search tab.

Back

Next

Your report has **0 fields**. Add/remove in the Customize tab. [More info](#)

Report Template

Custom (xlsx,csv)

✓ This is the default constituent report template.

- Save fields as New Report Template?
- Hide anonymous donor details?
- Spreadsheet Friendly? (Preserve leading zeros)
- Exclude inactive/invalid contact info?
- Remove line breaks from all fields

Select the fields that you would like to add to your CSV/XLSX export.

Customize field order (drag and drop) and settings. [Quick Preview](#) | [Remove all](#)

Constituent Fields

[Add all](#) | [Remove all](#)

Constituent Category Fields

LGL Constituent ID



1. Search

2. Customize

3. Preview

4. Save Export

Defines what data you want in your report

Columns = what you want to know, for example:



Constituent ID	Sort name	Total Giving LY	Last gift
981234			
983654			
988334			



1. Search

2. Customize

3. Preview

4. Save Export

Constituent Fields

Constituent Category Fields

Contact Info. Fields

Gift/Pledge/Goal Fields

Appeal & Event Fields

Common report fields

LGL Constituent ID

Sort Name

Salutation

Addressee

Last contact rpt.

Groups

Preferred Email

Total Giving (custom)

Gifts

see next slides



1. Search

2. Customize

3. Preview

4. Save Export

Important field:

Total Giving (custom)

Total Giving (custom) [Add another](#)

Label Prefix

Select columns to include

<input checked="" type="checkbox"/> Amount	<input type="text" value="TG Amount"/>
<input type="checkbox"/> Deductible	<input type="text" value="TG Deductible"/>
<input type="checkbox"/> Count	<input type="text" value="TG Count"/>
<input type="checkbox"/> Quantity Total	<input type="text" value="Qty (In Kind)"/>
<input type="checkbox"/> Tier	<input type="text" value="TG Tier"/>

Use parameters to limit gifts to sum up

Customization Parameters

Choose the criteria by which gift information will be restricted

<i>Gift Types</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Campaigns</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Funds</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Appeals</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Events</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Gift Categories</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Location</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Payment Types</i>	<input type="text" value="include"/>	<input type="button" value="Select"/>
<i>Pledge amount vs. balance</i>	<input type="text" value="Balance"/>	<input type="button" value="?"/>
<i>Is Pledge Payment?</i>	<input type="text" value="Yes or No"/>	<input type="button" value="?"/>
<i>Date range</i>	<input type="text" value="All dates"/>	<input type="text" value=""/> <input type="button" value="to"/> <input type="text" value=""/>

1. Search

2. Customize

3. Preview

4. Save Export

Parameters for Total Giving operate independently from your Search criteria **

- Constituent search
 - People who gave a gift in 2023
- Columns (what I want to know)
 - Giving in 2023
 - but also their last gift, **even** if that occurred in 2024

**** This is the most important lesson today**



1. Search

2. Customize

3. Preview

4. Save Export

If you want only the most recent gift, you could also use the **Last Gift** reporting field

Important field:

Gifts

Gifts Add anc

Label Prefix

Select columns to include

<input checked="" type="checkbox"/> Gift date	<input type="text" value="Gift date"/>
<input type="checkbox"/> Deposit date	<input type="text" value="Deposit date"/>
<input checked="" type="checkbox"/> Gift amount	<input type="text" value="Gift amount"/>
<input type="checkbox"/> Deductible amt.	<input type="text" value="Deductible amt."/>
<input type="checkbox"/> Quantity	<input type="text" value="Qty (In Kind)"/>

Customization Parameters

Choose the criteria by which gift information will be restricted

Gift Types

Campaigns

Funds

Payment Types

Is Pledge Payment?

Date range

Single gift amount \$

Count
How many records per row?

Remember to set the count !

The 2nd most important lesson



1. Search

2. Customize

3. Preview

4. Save Export

Which rows
should be in the
report?

ie., who do you
want in your
report?

Spreadsheet (excel or csv)

or PDF

no preview available



1. Search

2. Customize

3. Preview

4. Save Export

LGL Constituent ID	Sort Name	Pref. Email	2023 Gifts (\$)	Last gift date	Last gift amount
942267	Aamon, Sally	sally@goforth.com	1675.0	2023-11-17	1500.0
942255	Aanestad, Tom	hunterbw@comcast.net	100.0	2023-09-20	100.0
944142	Abbott, Jessica	jessica.abbott@gmail.com	100.0	2023-02-22	100.0
942225	Abreau, Sally	sally@abreau.org	75.0	2023-04-11	75.0
944127	Acme Construction, Aerospace	jim@bowman.com	1200.0	2023-02-03	1200.0
941995	Adams, Mike and Jane	mike.adams-test@gmail.com	125.0	2024-01-05	100.0
944932	Addams, Morticia		300.0	2023-05-02	300.0
945672	Adkins, Tom	tom.a@adkins.org	100.0	2023-11-28	100.0

1. Search

2. Customize

3. Preview

4. Save Export

Ready to export **40** constituents. Add/remove in the Search tab.

Your report has **5 fields**. Add/remove in the Customize tab. [? More info](#)

Save export

Add a useful name and description

Export Name

2023 donors and their last gift

Description

Looking at "Gifts" only (not pledges, soft credits, etc.)

File Format

XLSX CSV

Create a re-usable report from this export?

Export Generation Schedule

Right away

Allow access for:

- Everyone
- Admin role
- Gift Entry role
- Fundraiser role
- Volunteer role

Can schedule reports to run daily, weekly, monthly

Save Export or Cancel



Export is ready

If over 500 rows, wait a minute and refresh page

Reports Archived reports Scheduled reports Archived Scheduled reports Exports Archi

Search exports

Name **Date created**

All dates to

Results 1 - 50 of 848

Export

↓ 2023 donors and their last gift — Ready for download **Sta**

Looking at "Gifts" only (not pledges, soft credits, etc.)

Type: Constituent • Created by: System User • Updated on: Jan 24, 2024 at 07:50 PM



Excel export

formatting added in Excel: bold, sort, shading

	A	B	C	D	E	F
1	LGL Constituent ID	Sort Name	Pref. Email	2023 Gifts (\$)	Last gift date	Last gift amount
2	945492	Mostel, Zero	zero@again.com	\$ 25,000.00	3/3/23	\$ 25,000.00
3	945457	Pinter, Harold		\$ 14,000.00	2/14/23	\$ 14,000.00
4	944672	Arthur, Chet	annualarthur@hotmail.com	\$ 7,500.00	5/22/23	\$ 7,500.00
5	943197	Balaski, Lorne	Lbalaski@msn.com	\$ 6,500.00	5/24/23	\$ 6,500.00
6	942267	Aamon, Sally	sally@goforth.com	\$ 1,675.00	11/17/23	\$ 1,500.00
7	943957	IBM Foundation		\$ 1,250.00	1/31/23	\$ 1,250.00
8	944127	Acme Construction, Aerospace	jim@bowman.com	\$ 1,200.00	2/3/23	\$ 1,200.00
9	941724	Appleton, Larry	appleton@perfectstrangers.com	\$ 1,075.00	11/14/23	\$ 500.00
10	944527	Allen, Brian	ballenxyz@seahaks.com	\$ 750.00	5/22/23	\$ 750.00
11	943107	Reese, Annie	Anoulaki@gmail.com	\$ 700.00	11/14/23	\$ 500.00
12	943187	Baden, Gina	badens@comcast.net	\$ 600.00	10/15/23	\$ 100.00
13	944067	Williams, Hunter	hunterbw@comcast.net	\$ 475.00	10/27/23	\$ 25.00
14	944932	Addams, Morticia		\$ 300.00	5/2/23	\$ 300.00
15	943917	Millory, Tom		\$ 250.00	4/10/23	\$ 250.00
16	945702	Showers, April	april.showers@gmai.com	\$ 200.00	12/4/23	\$ 200.00
17	942211	Testing, IB	ibttesting@gmail.com	\$ 200.00	8/24/23	\$ 200.00
18	941995	Adams, Mike and Jane	mike.adams-test@gmail.com	\$ 125.00	1/5/24	\$ 100.00
19	945662	Daly, Thomas	thomas.daly@chicago.gov	\$ 120.00	10/18/23	\$ 120.00
20	944677	Hawkins, Amanda	hunterbw@comcast.net	\$ 120.00	10/18/23	\$ 120.00
21	945462	Me, Mini		\$ 112.00	2/14/23	\$ 112.00
22	942255	Aanestad, Tom	hunterbw@comcast.net	\$ 100.00	9/20/23	\$ 100.00
23	944142	Abbott, Jessica	jessica.abbott@gmail.com	\$ 100.00	2/22/23	\$ 100.00
24	945672	Adkins, Tom	tom.a@adkins.org	\$ 100.00	11/28/23	\$ 100.00
25	941692	Alexander, Sarah	jasonalexader@me.com	\$ 100.00	1/17/24	\$ 500.00
26	944287	Bard, John	john@bard.com	\$ 100.00	9/5/23	\$ 100.00
27	941697	Barone, Ray	ray@barone.com	\$ 100.00	11/2/23	\$ 100.00



Before creating a report, write down exactly what you want ... consider the 5 Ws

- **Who** who (constituents) should be in your report?
- **What** what do you want to know? ie., Total Giving?
- **When** time-frame for the gifts?
- **Where** where did the gifts come from? check, online?
- **Why** why did the donor give: specific appeal? event?



Our favorite kind of support questions

- *I am trying to create a detailed report of last year's donors with the total amount for that period as well as what amount they gave to specific campaigns.*
- *I'm trying to pull a report on volunteer hours from last year--specifically folks who had over 20 hours.*



Poll

Which custom report would you like to see?

- Lybunt: donors who gave in 2023 but not in 2024
- First time donors in 2024
- Top donors from 2022-2024
- Sum of giving this year by Appeal
- Time contributed for each volunteer



DEMO



Lybunt: donors who gave last year but not this year

- Constituent search

- Gift date = last year
- Gift types = gift
 - and not
- Gift date = this year
- Gift types = gift

- Export

- LGL Constituent ID
- Addressee
- Total Giving
 - Gift types = Gift
 - Gift dates = last year
- Total Giving (should be \$0)
 - Gift types = Gift
 - Gift dates = this year
- Optionally could show individual gifts:
 - Gifts (set count to 2 or higher to see more than just the most recent gift)



First-time donors in 2024

- Constituent search

- First gift date* = this year
- Gift types = gift

*The “first gift date” search is based on a stored value in the constituent record for their first Gift (gift type = gift).

- Export

- LGL Constituent ID
- Addressee
- Total Giving
 - Gift types = Gift
 - Gift dates = this year
- Optionally could show individual gifts:
 - Gifts (set count to 2 or higher to see more than just the most recent gift)



Top Donor Report past 3 years (2022-2024)

- Constituent search or ● Fundraising search
 - Total Giving \geq \$1,000 (for example)
 - Gift types = Gift, In Kind, Soft Credit
 - Gift dates = 2022 to 2024
- Export
 - LGL Constituent ID
 - Addressee (or Sort name)
 - Total Giving
 - Gift types = Gift, In Kind, Soft credit
 - Gift dates = 2022 to 2024
- Fundraising search
 - Gift dates = 2022 to 2024
 - Gift types = Gift, In Kind, Soft credit
 - View
 - Giving by constituent
 - Export



Sum of giving this year by Appeal

- Fundraising search
 - Gift date = this year
 - View
 - Giving by appeal



Time contributed for each volunteer

- Constituent search
 - Total vol. hours: greater/equal 0 (only people with vol. entries will show)
 - or use Vol. dates (only people with vol. entries in the date range will show)
- Export
 - LGL Constituent ID
 - Addressee (or Sort name)
 - Volunteer Hours



Bonus: Open Pledge Report

Use pre-built report: Open Pledges, in Reports > Gift/Pledge Reports

Or create a custom version:

- Fundraising search
 - Gift date = All dates
 - Gift type = Pledge
 - Is completed? = No
- Export Results
 - LGL Constituent ID
 - Addressee
 - Gift type
 - Gift date
 - Pledge amount
 - Pledge balance
 - Installments (set count to 1 or higher)

