



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

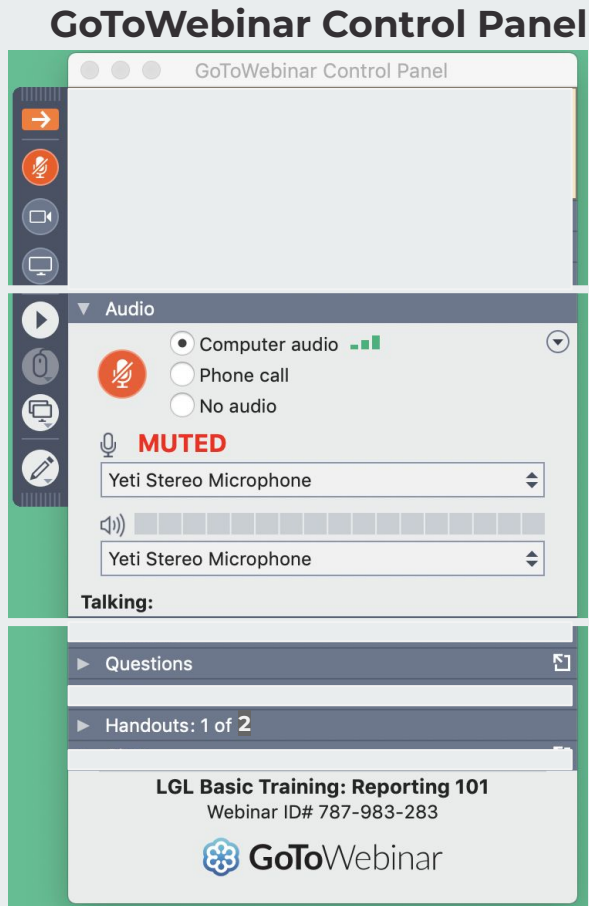


# Audio Problems?

Audio



Questions  
Handouts



- make sure computer volume is turned up





# Little Green Light Reporting 101

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# Reporting 101 - agenda



Part 1

**Built-in reporting (point and click)**

- Q&A

Part 2

**Custom reports (build your own)**

- Q&A



## A quick poll

**Have you created donor reports in the past? Select best answer.**

- ☐ Not really, I'm new to reporting on donors
- ☐ Yes, using spreadsheets, but not in a donor management system
- ☐ Yes, in another donor management system, but not LGL
- ☐ Yes, in LGL



# First Demo

- Dashboard
  - key widgets (tiles)
  - download all or pieces of dashboard
  - customize display and refresh
  - the “organization dashboard”
  - sneak peek at new widgets coming soon
- 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

▼ Total Raised by Retention Status



2022 2023 **2024** ☐ Year to date? ?

|                   | Donors    | Total Raised <span>?</span> | Gifts              | Pledges (balance)         |
|-------------------|-----------|-----------------------------|--------------------|---------------------------|
| First-time Donors | 11        | \$11,880                    | \$11,480           | \$500 (\$400)             |
| Retained Donors   | 26        | \$17,025                    | \$8,175            | \$11,500 (\$8,850)        |
| Recaptured Donors | 32        | \$7,366.50                  | \$7,366.50         | \$0 (\$0)                 |
| <b>Total</b>      | <b>69</b> | <b>\$36,271.50</b>          | <b>\$27,021.50</b> | <b>\$12,000 (\$9,250)</b> |

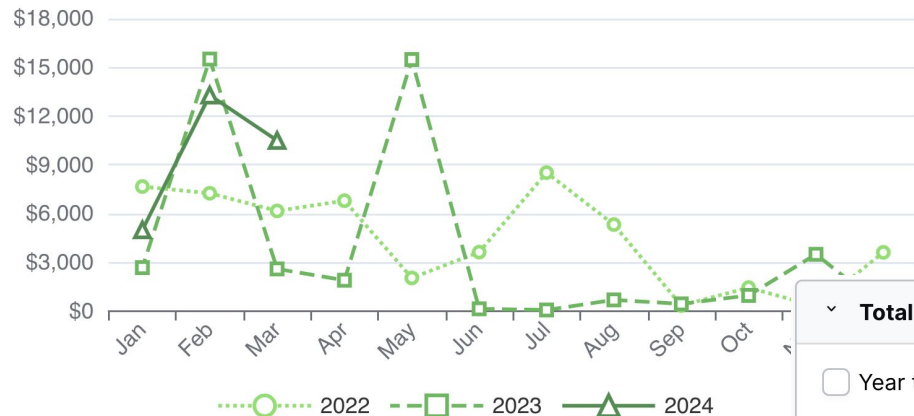
Last updated: May 20, 2024 at 01:25 AM · [Refresh](#)



▼ Total Raised by Month, Year over Year ?



☐ Year to date? ?

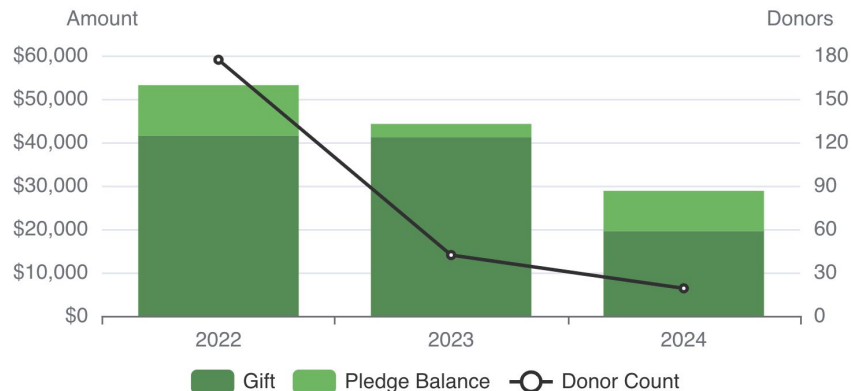


Last updated: March 18, 2024 at 10:26 AM

▼ 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 ✕ 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

re-size

Donor Summary by Year

2021 2022 2023 ☐ Year to date?

|                         | Donors    |
|-------------------------|-----------|
| First-time Donors       | 4         |
| Consecutive year donors | 6         |
| Recaptured donors       | 2         |
| <b>Total</b>            | <b>12</b> |

remove from view

Membershin Summary

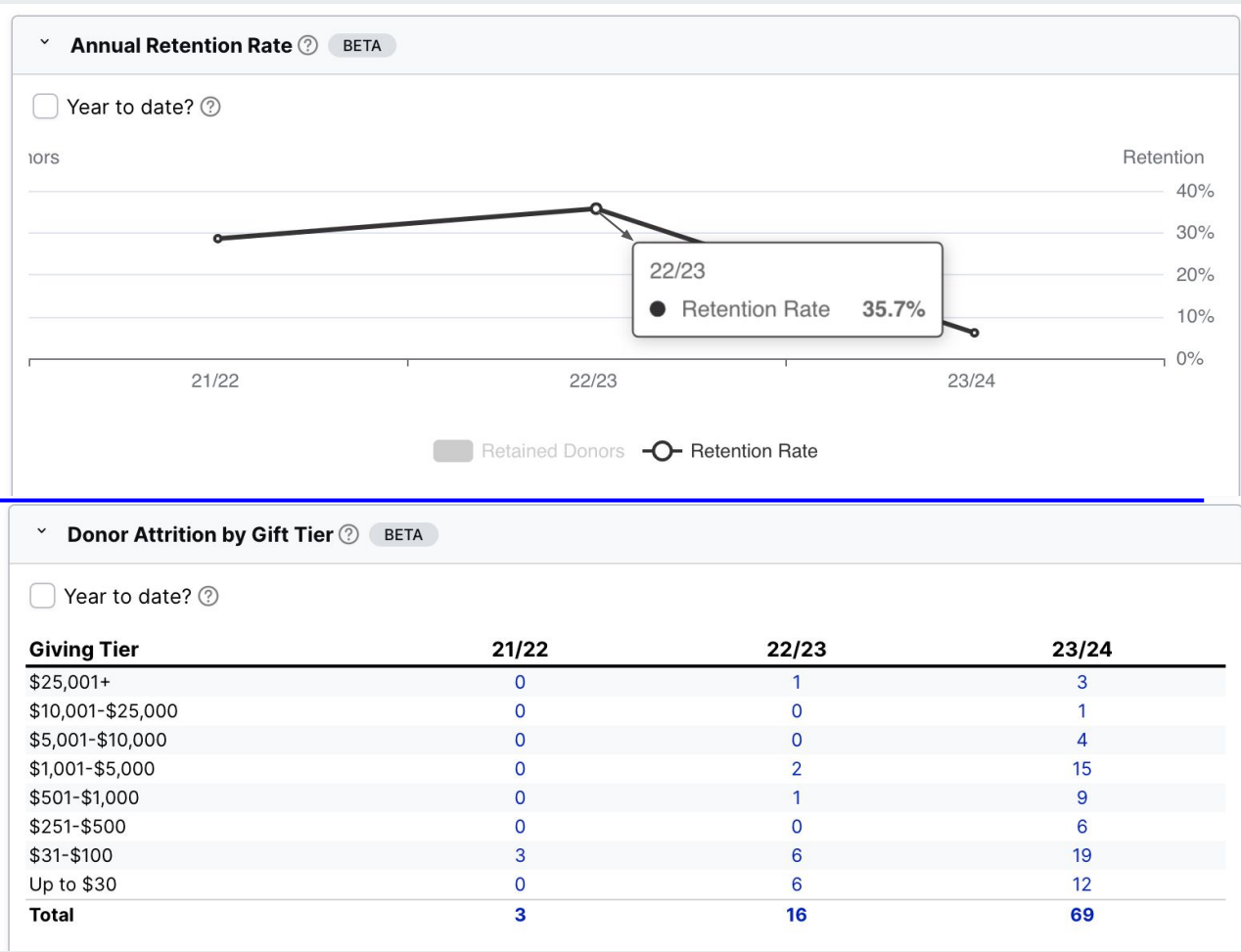
✕



# Sneak peek

- 5 new widgets coming soon:
- Annual retention
  - Counts by retention status
  - Donors by gift tier
  - Attrition by gift tier
  - Year-over-year giving change

Watch for a blog post announcement.



# Fundraising > Funds

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

# 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 |
|-----------------|-------------|-------------|----------|--------------|
| <b>Totals</b>   | \$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)

Home ▾

Constituents ▾

Fundraising ▾

Activity ▾

Mailings ▾

Forms ▾

Settings ▾

Dashboard

Team Members

Reports

My searches

Flex Importer

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

## PDF example

| Giving Tier       | # of gifts | Total gifts |
|-------------------|------------|-------------|
| <b>Totals</b>     | 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

| 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: 5/20/24

### Individual details: Aamon, Sally

Aamon, Sally

Sally Aamon and Tom Aaron

123 Any Street

Seattle, WA 98102

Home: 206.233.3489

[sally@forth.com](mailto:sally@forth.com)

[tommy@aaronfamily.com](mailto: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



**\$997**

# Gifts by Tier - this year

(pdf)

## Center House

| Giving Tier       | # of gifts | Total gifts |
|-------------------|------------|-------------|
| <b>Totals</b>     | 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.
- 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 audio)

**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

**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

to

Add more criteria - Advanced options

View: All giving Bulk edit

Results 1 - 50 of 97

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

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

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





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# Little Green Light Reporting 101

End of Part 1





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Training  
Webinar

Welcome!

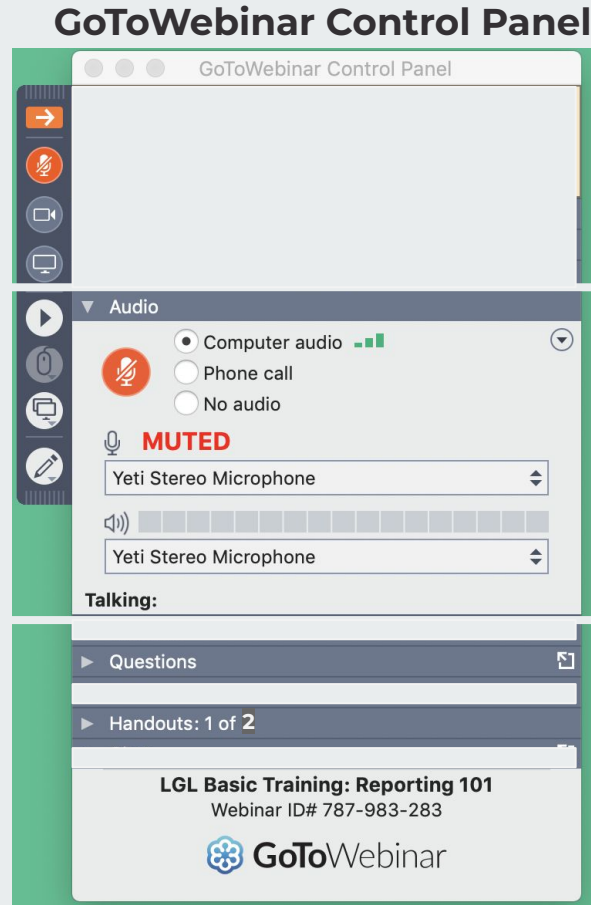
**Please tell us: Do you use Excel or Google spreadsheets? And how would you rate your level of expertise?**

Use the Question box in the  
Go to Webinar control panel



# Audio Problems?

Audio  
section



Handouts



- make sure computer volume is turned up





# Little Green Light Reporting 101

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Q&A with Lisa Lennick



# Reporting 101 - agenda

Part 1

**Built-in reporting (point and click)**

- Q&A



Part 2

**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 ----- ▼

*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](#) ?

🔍 Search

add add'l search fields | add another search query

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

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**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 and](#)

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

**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)

[illegible]

**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](#) [Archived Exports](#)

### Search exports

| Name                 | Date created                               |                      |                                                        |                                       |
|----------------------|--------------------------------------------|----------------------|--------------------------------------------------------|---------------------------------------|
| <input type="text"/> | All dates <input type="button" value="v"/> | <input type="text"/> | <input type="button" value="to"/> <input type="text"/> | <input type="button" value="Search"/> |

Results 1 - 50 of 848

| Export                                                                                                  | Status |
|---------------------------------------------------------------------------------------------------------|--------|
| <div><input type="button" value="Download"/> 2023 donors and their last gift</div> — Ready for download | Stable |
| 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  | <b>LGL Constituent ID</b> | <b>Sort Name</b>             | <b>Pref. Email</b>            | <b>2023 Gifts (\$)</b> | <b>Last gift date</b> | <b>Last gift amount</b> |
| 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@gmail.com       | \$ 200.00              | 12/4/23               | \$ 200.00               |
| 17 | 942211                    | Testing, IB                  | ibtesting@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)

