

# Little Green Light

## Reporting 101 Basic Training - Part 1

**Part 1:** In this session, we'll review the reports that are included in your LGL account, including Dashboard reports, Fundraising views and built-in reports.

### LGL Dashboard

#### Summary Reports

- My Dashboard

- Organization Dashboard

#### Customizing your dashboard

Resource: [The LGL Dashboard](#)

### On screen Fundraising Reports

#### Summary Reports by Fundraising coding

- Campaigns, Funds, Appeals, Events

#### Fundraising Views

- Giving by Appeal

- Giving by Month

Resource: [Fundraising views](#)

**Demo:** Customizing your Dashboard, add targets to appeal to help you track progress, and using Fundraising Views

### Stop for questions

### Using LGL's Pre-built reports

- Where to access pre-built reports

- Examples of pre-built constituent reports

- Examples of pre-built gift reports

Resource: [LYBUNT report](#)

**Demo:** Create a LYBUNT report using a pre-built template and a PDF gift report using a pre-built template

### Questions & Answers

## Reporting 101 Basic Training- Part 2

**Part 2:** In this session, we'll take a look at how you can create custom reports in LGL, cover key questions that will help you determine whether you need a constituent report or a gift report, and go over some tips for troubleshooting your custom reports.

### Defining your report criteria

**Search:** What type of records do you need to include?

**Customize:** What do you need to know about those records?

**Resource:** [Why start your custom report in the Constituents tab vs the Fundraising tab?](#)

### Building a custom report:

**Step 1:** Create a search - Constituents or Fundraising tab, and click Export Results

**Step 2:** Customize your report: choosing the fields you want to include

1. Typical fields to include
2. Important field: Total Giving
3. Important field: Gifts

**Step 3:** Preview your report

**Step 4:** Save export and download

### Demo: Creating custom reports

- A constituent report of everyone who can receive mail that includes their name and mailing address
- A constituent report of board members and their total giving for this year, as well as any gifts they made to the Collections fund

Resources: [Creating a mailing list to send to a mail house](#)  
[Common reports and how to create them](#)

### Stop for questions

### Troubleshooting your custom report:

Did you create the type of report that suits your needs? Constituent vs. gift report

Check your search criteria and/or customization against an example record

Click Enable Editing if data (such as zip codes) is missing in your downloaded export

### Demo: Troubleshooting our custom report

### Questions & Answers