

LGL Basic Training Reporting 101

Presented by Virginia Davidson
Assisted by Emily Fitzsimmons

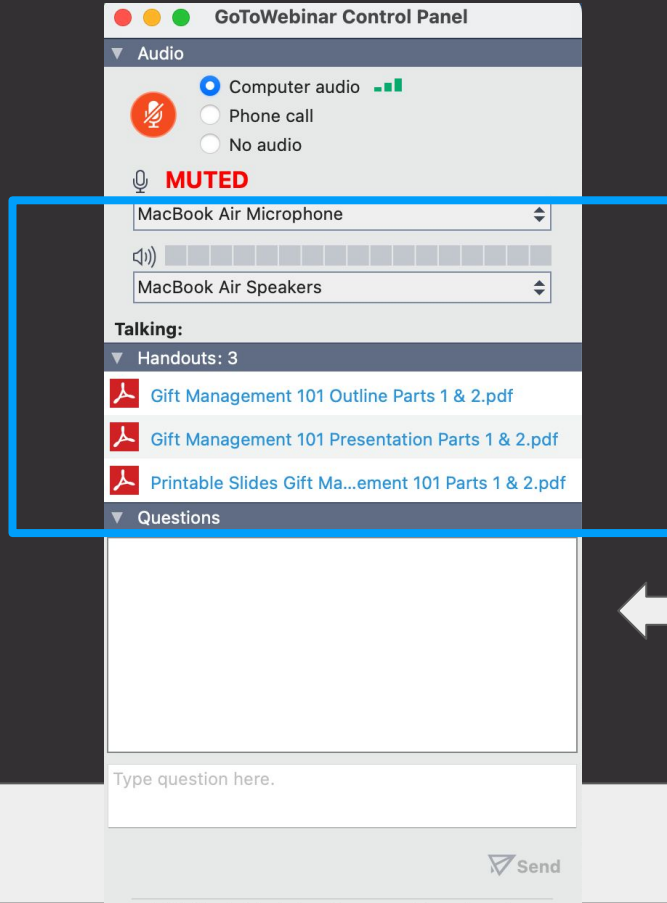


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← Questions



LGL Basic Training Reporting 101: Part 1

Presented by Virginia Davidson
Assisted by Emily Fitzsimmons



What we'll cover today:

In this session, we'll review information that is included in your LGL account, including dashboard widgets, summaries, fundraising views, and built-in reports.

All sessions are recorded and will be emailed to you following each session. You can also view all recordings in the [Training Videos section](#) of the LGL Video Library.



LGL Dashboard



LGL Dashboard widgets

Little Green Light

Home

Constituents

Fundraising

Activity

Mailings

Forms

Settings

Dashboards

Team Members

Reports

My searches

Flex Importer

My dashboard

Organization dashboard

Customize Dashboard

Print Dashboard

Alerts

Duplicates: There are 6 possible duplicate(s) to review

Email me? Hide

Email Drafts: 1 acknowledgment email

Email me? Hide

Unacknowledged Gifts: There are 18 gift(s) that may need to be acknowledged

Email me? Hide

Manage alerts

Last updated: 2024-09-20 at 09:09 AM Refresh

Total Raised by Retention Status

22/23 23/24 24/25

Year to date?

	Donors	Total Raised	Gifts	Pledges (balance)
First-time Donors	2	\$2,600	\$2,600	\$0 (\$0)
Retained Donors	17	\$4,690	\$4,490	\$600 (\$200)
Recaptured Donors	4	\$1,280	\$0 (\$0)	\$0 (\$0)
Total	23	\$8,570	\$8,370	\$600 (\$200)

Last updated: 2024-09-20 at 12:11 PM Refresh

Stewardship Opportunities

Steward: All

Top donors with no gifts or pledges this fiscal year

64 constituents

Top donors with limited stewardship this fiscal year

87 constituents

LYBUNTs (gave last year but not this)

50 constituents

SYBUNTs (gave some year but not this)

64 constituents

Gifts not marked as acknowledged in LGL

18 gifts

Last updated: 2024-09-20 at 12:11 PM Refresh

Fundraising Totals

Year Month

Year to date?

	22/23	23/24	24/25
Gifts	62 / \$23,765	99 / \$21,180	25 / \$8,370
In Kind	0 / \$0	0 / \$0	0 / \$0
Other Income	0 / \$0	0 / \$0	0 / \$0
Pledges	0 / \$0	0 / \$0	1 / \$600 (\$200)
Installments	0 / \$0	0 / \$0	1 / \$200

Last updated: 2024-09-20 at 12:11 PM Refresh

Top Active Campaigns

22/23 23/24 24/25

Year to date?

Campaign	Total Raised	Gifts	Pledges (balance)
Annual Giving	\$7,740	\$7,740	\$0
Capital Campaign	\$830	\$630	\$600 (\$200)

Manage Campaigns

Last updated: 2024-09-20 at 12:11 PM Refresh

Top Active Funds

22/23 23/24 24/25

Year to date?

Fund	Total Raised	Gifts	Pledges (balance)
Unrestricted	\$2,540	\$2,540	\$0
Collections	\$5,200	\$5,200	\$0
New Building	\$830	\$630	\$600 (\$200)

Manage Funds

Last updated: 2024-09-20 at 12:11 PM Refresh



Fundraising Totals

Click to close



Year

Month

☐ Year to date? ?

	22/23	23/24	24/25
Gifts	62 / \$23,765	99 / \$21,180	25 / \$8,370
In Kind	0 / \$0	0 / \$0	0 / \$0
Other Income	0 / \$0	0 / \$0	0 / \$0
Pledges	0 / \$0	0 / \$0	1 / \$600 (\$200)
Installments	0 / \$0	0 / \$0	1 / \$200

Last updated: 2024-09-20 at 12:11 PM • [Refresh](#)



Top Active Appeals



22/23

23/24

24/25

☐ Year to date? ?

Appeal	Total Raised ?	Gifts	Pledges (balance)
2024 Summer Survey	\$2,740	\$2,740	\$0
2024 Capital Appeal	\$830	\$630	\$600 (\$200)

Manage Appeals

Last updated: 2024-09-20 at 12:11 PM • [Refresh](#)



▼ Total Raised by Retention Status



22/23

23/24

24/25

☐ Year to date? [?](#)

	Donors	Total Raised ?	Gifts	Pledges (balance)
First-time Donors	2	\$2,600	\$2,600	\$0 (\$0)
Retained Donors	17	\$4,690	\$4,490	\$600 (\$200)
Recaptured Donors	4	\$1,280	\$1,280	\$0 (\$0)
Total	23	\$8,570	\$8,370	\$600 (\$200)

Last updated: 2024-09-20 at 12:11 PM • [Refresh](#)



Customize Dashboard

Widgets on your dashboard can be:

- moved
- re-sized
- removed

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

My dashboard Organization dashboard

Customize Dashboard Save or cancel

Reset to Default

- 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](#).

☐ Favorite Lists

☐ My Constituents, Goals & Tasks

☐ Annual Retention Rate BETA

☐ Donors by Retention Status BETA

☐ Total Raised by Month, Year over Year

☐ Calendar

☐ Membership Summary

☐ Consecutive Years of Giving

☐ Current Donors by Gift Tier BETA

☐ Donor Attrition by Gift Tier BETA

☐ Pledge Summary by Year of Pledge

☐ Total Raised by Type and Year

☐ Goals Summary

☐ Total Raised by Type and Month

☐ Activity

☐ Volunteering Hours

☐ Constituent Search

☐ Donor Giving Compared to Prior Year BETA



On screen Fundraising Reports



Fundraising > Funds - on screen summary

Little Green Light

Funds

Active

Archived

Campaign

-- any campaign -- ▾

Fund name

Q Search

Results 1 - 3 of 3

Fund ▾	Code	Campaign	Status	Progress
Collections		Actions	<input checked="" type="checkbox"/> Active	Gifts 54 / \$16,090 from 51 Constituent(s)
New Building		Actions	<input checked="" type="checkbox"/> Active	Gifts 51 / \$12,145 from 50 Constituent(s) Pledges (balance) 1 / \$600 (\$200) from 1 Constituent(s)
Unrestricted		Actions	<input checked="" type="checkbox"/> Active	Gifts 251 / \$52,920 from 85 Constituent(s)



Fundraising > Appeals - on screen summary

Appeals

Active

Archived

Campaign

-- any campaign --

Appeal type

-- any appeal type --

Appeal name

Appeal dates

All dates

to

Q

Search

Results 1 - 3 of 3

Appeal		Date	Status	Constituents/recipients	Gifts
2024 Summer Survey	<div><div></div>Customize</div> <div><div></div>Actions</div>	2024-08-22	<div><div></div>Active</div>	Appeal Status ----- Total (0)	Gifts <div>21 / \$4,030 from 21 Constituent(s)</div>
2024 Capital Appeal	<div><div></div>Customize</div> <div><div></div>Actions</div>	2024-07-23	<div><div></div>Active</div>	Appeal Status ----- Total (0)	Gifts <div>18 / \$2,890 from 17 Constituent(s)</div> <div>Pledges (balance) <div>1 / \$600 (\$200) from 1 Constituent(s)</div></div>
2023 Year End Solicitation	<div><div></div>Customize</div> <div><div></div>Actions</div>	2024-02-23	<div><div></div>Active</div>	Appeal Status ----- Total (0)	Gifts <div>20 / \$4,340 from 20 Constituent(s)</div>



Fundraising Views



Fundraising Views > Giving by Appeal

Fundraising

+ Add gift + Add goal Export to .csv

Filter Results

- By Gift Type
 - Contributions
 - ☐ Gift 25 / \$8,370
 - Pledges
 - ☐ Pledge 1 / \$600 (\$200)
 - ☐ Installment 1 / \$200
- By Campaign
 - ☐ Annual Giving (20)
 - ☐ Capital Campaign (6)
- By Fund
 - ☐ Collections (8)
 - ☐ New Building (6)
 - ☐ Unrestricted (12)
- By Gift Category
 - ☐ Donation (19)
 - ☐ Event Registration (5)
 - ☐ Sponsorship (1)
 - ☐ Standard Pledge (1)



Advanced Search

Show gifts where

No saved searches

All of the following are true

☐ Gift Date This fiscal this fiscal to this fiscal

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

[New Search](#)

Giving by appeal

Results 1 - 3 of 3

Appeal	Total Raised	Gifts	Pledges	In Kind	Soft credits	Other Income
Totals	\$8,570	\$8,370	\$600 (\$200)	\$0	\$0	\$0
Unassigned	\$5,000	\$5,000	\$0	\$0	\$0	\$0
2024 Capital Appeal	\$830	\$630	\$600 (\$200)	\$0	\$0	\$0
2024 Summer Survey	\$2,740	\$2,740	\$0	\$0	\$0	\$0



Fundraising views - Giving by Month

Export to .csv

Export to .pdf

Advanced Search

Show gifts where

All of the following are true

(x)

Gift Date

This fiscal

this fiscal

to

this fiscal

Add more criteria

Advanced options

Save this search

New Search

Giving by month



Results 1 - 3 of 3

Month	Total Raised	Gifts	Pledges	Installments	In Kind	Soft credits	Other Income
Totals	\$8,570	\$8,370	\$600 (\$200)	\$200	\$0	\$0	\$0
September, 2024	\$2,650	\$2,650	\$0	\$200	\$0	\$0	\$0
August, 2024	\$4,310	\$4,310	\$0	\$0	\$0	\$0	\$0
July, 2024	\$1,610	\$1,410	\$600 (\$200)	\$0	\$0	\$0	\$0



Fundraising views- Giving by Month

Advanced Search

Show gifts where

All of the following are true

×

Gift Date

Custom dates

2023-01-01

to

2024-12-31

Add more criteria · Advanced options

Save this search

New Search

Giving by month

Results 1 - 15 of 15

Month	Total Raised	Gifts	Pledges
Totals	\$36,875	\$36,675	\$600 (\$200)
September, 2024	\$2,650	\$2,650	\$0
August, 2024	\$4,310	\$4,310	\$0
July, 2024	\$1,610	\$1,410	\$600 (\$200)
June, 2024	\$1,350	\$1,350	\$0
May, 2024	\$1,500	\$1,500	\$0
April, 2024	\$1,315	\$1,315	\$0
March, 2024	\$11,880	\$11,880	\$0
February, 2024	\$1,160	\$1,160	\$0
January, 2024	\$45	\$45	\$0
December, 2023	\$1,920	\$1,920	\$0
November, 2023	\$2,010	\$2,010	\$0
May, 2023	\$585	\$585	\$0
March, 2023	\$2,010	\$2,010	\$0
February, 2023	\$2,550	\$2,550	\$0
January, 2023	\$1,980	\$1,980	\$0



Demo:

Customizing Dashboard and using Fundraising Views



Pre-built Reports



LGL Pre-built Reports: Home > Reports

Little Green Light

Virginia Davidson | [My profile](#)

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

Dashboard Team Members **Reports** My searches Flex Importer

Reports

Constituent Reports >

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Smart Fields

Manage Templates

From this page you can build and generate constituent reports.

[More info...](#)

Search by Report name



+ New Report

Reorder

> Recent constituent exports

LYBUNT Report 2024-09-20

Ready for download

50 records

Type: Constituent - Date: 2024-09-20 at 05:10 PM

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](#)

Email Addresses -- CSV

[Preview](#)

Contains constituent name and email address information for all constituents with active email addresses.

Status: Active ▾

Edit

Copy

[Export](#)

Phone Numbers -- CSV

[Preview](#)

Contains constituent name and phone number information for all constituents with active phone numbers.

Status: Active ▾

Edit

Copy

[Export](#)



Example of pre-built constituent report: LYBUNT

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Smart

From this page you can build and generate constituent reports.

More info...

Search by Report name

+ New Report

Reorder

LYBUNT Report -- CSV

Preview

A report showing constituents who gave last year, but have not yet given this year.

Status: Active

Edit

Copy

Export

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

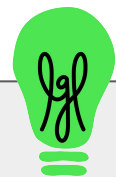
Copy

Export

Basic Contact Info -- CSV

Preview

An export of basic name and preferred contact information for all of your constituents.



Example of pre-built constituent report: LYBUNT

	A	B	C	D	E	F	G	H	I	J	K
1	LGL Constituent ID	Constituent Type	Primary Group	First Name	Last Name	Annual Report Name	Employer/Organization	Total Gifts in 2024/2025	2024/2025 Tier	Total Gifts in 2023/2024	2023/2024 Tier
2	551	Individual		Gavin	Anderson	Gavin and Marie Anderson		0		500	\$251-\$500
3	216	Individual	Staff	Larry	Appleton	Larry Appleton and his cousin Balki Bartokomous	Perfect Strangers	0		250	Up to \$250
4	16	Organization			Mansion		Avengers Mansion Headquarters of the Avengers	0		80	Up to \$250
5	256	Individual		Elwood	Blues	Elwood Blues	The Blues Brothers	0		50	Up to \$250
6	341	Individual		John	Bower	Bower family	Who's the Boss?	0		110	Up to \$250
7	356	Individual		Mike	Brady	Mr. and Mrs. Mike Brady		0		430	\$251-\$500
8	21	Individual	Board Member	Melinda	Brown	Melinda Brown	Back to the Future	0		80	Up to \$250
9	381	Organization			Cheers	Cheers	Cheers	0		580	\$501-\$1,000
10	31	Individual		Jed	Clampett	Clampett family	Beverly Hillbillies	0		295	\$251-\$500
11	121	Individual		Joan	Clayton	Joan Clayton	Girlfriends	0		300	\$251-\$500
12	361	Individual		Tina	Colby	The Colbys	The Colbys	0		240	Up to \$250
13	226	Individual	Staff	Sarah	Conner	Conner family	Roseanne	0		50	Up to \$250
14	416	Individual		Frasier	Crane	Dr. Frasier Crane and Martin Crane	Dr. Frasier Crane and Martin Crane	0		45	Up to \$250
15	276	Individual		Blanche	Devereaux	Blanche Devereaux	The Golden Girls	0		200	Up to \$250
16	61	Individual		JR	Ewing	Ewing family	Dallas	0		360	\$251-\$500
17	201	Individual	Board Member	Jessica	Fletcher	Jessica Fletcher	Murder She Wrote	0		1200	\$1,001-\$5,000
18	86	Individual	VIP	Archie	Griffin	Griffin family	Family Guy	0		800	\$501-\$1,000



Example of pre-built constituent report: Directory

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Fundraising ▾

Activity ▾

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Forms ▾

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From this page you can build and generate constituent reports.

[More info...](#)

Search by Report name

+ New Report

Reorder

Directory -- PDF

A simple, compact A-Z Directory of constituents, with name, group, and contact information.

Status: Active ▾

Edit

Copy

Export



Example of pre-built constituent report: Directory

Little Green Light

Directory 2024-09-20

Constituent Directory

Printed on: 9/20/24

A

ABC Foundation

Contact: Elizabeth Brown
10 High St
Boston, MA 02110-1605

w: elizabeth@abcfound.org

Mrs. Susan Alexander

Salutation: Suzie
185 West 74th Street
New York, NY 10002

h: (888) 555-0012
h: alexander@citizenkane.com

Gavin and Marie Anderson

Salutation: Gavin and Marie
93 Ohio Ave
Providence, RI 02905-4303

h: 401-892-9856
h: ganderson@gmail.com

Larry Appleton and his cousin Balki Bartokomous

Salutation: Larry
711 Calhoun Street
Chicago, IL 60603
Groups: Staff

m: (888) 555-0044
h: appleton@perfectstrangers.com

Lew Archer's office

Salutation: Archer's
8411 1/2 Sunset Boulevard
Hollywood, CA 90210

m: (888) 555-0050
h: archer's@seriesofnovels.com

Avengers Mansion Headquarters of the Avengers

890 Fifth Avenue
Manhattan, NY 10021

w: (888) 555-0004
h: mansion@avengers.com



Example of pre-built constituent report: Snapshot

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Smart

From this page you can build and generate constituent reports.

[More info...](#)

Search by Report name

+ New Report

Reorder

Directory -- PDF

A simple, compact A-Z Directory of constituents, with name, group, and contact information.

Status: Active

Edit

Copy

Export

LYBUNT Report -- CSV

A report showing constituents who gave last year, but have not yet given this year.

Status: Active

Edit

Copy

Export

Preview

Constituent Snapshot -- PDF

A report with a 1-page overview/snapshot per constituent.

Status: Active

Edit

Copy

Export

Full Export -- CSV

Preview



Example of pre-built constituent report: Snapshot

Individual details: *Danforth, Phil*

Danforth, Phil
Phil and Claire Danforth
10336 Dunleer Dr
Los Angeles, CA 90064-4516
pdanforth@gmail.com

LGL ID
571
Salutation
Phil and Claire
Alt. Salutation
Phil and Claire
Spouse
Claire Danforth

Giving summary

Total \$100
Largest \$100 gift on 9/14/24
Last \$100 gift on 9/14/24
First \$100 gift on 9/14/24
Gifts 1 / \$100

Gift History

Date	Amount	Fund	Appeal
9/14/24	\$100	Unrestricted	2024 Summer Survey

Next Steps

Not available

Goals

Not available

Categories

Contact Type

Primary

Groups

Acknowledgment Preference

N/A

Related Information

Relationships

N/A

Class Years

N/A

Stewards

N/A

General Information

Background Info

N/A

Capacity Interest

N/A N/A

Communication Tags

N/A

Volunteer Interest

N/A

Membership

N/A

Education info

N/A



Example of pre-built gift report: Deposits for this month

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Man...

From this page you can build and generate gift reports.

More info...

Search by Report name

+ New Report

Reorder

Gifts this year -- CSV

Preview

All gifts for the current fiscal year, to date

Status: Active

Edit

Copy

Export

Deposits for this month -- CSV

Preview

Deposit report. Includes the constituent name, gift amount, date and fund.

Status: Active

Edit

Copy

Export

Deposits for this month -- PDF

Deposit report. Includes the constituent name, gift amount, date and fund.

Status: Active

Edit

Copy

Export



Example of pre-built gift report: Deposits for this month

Little Green Light

Deposit Report
Printed on: 9/23/24

Name	Amount	Deposited Amount	Deposit Date	Gift Date	Fund
Phil and Claire Danforth	\$50 (Gift)	\$50	9/20/24	9/20/24	Unrestricted
Kathleen Kelly	\$250 (Gift)	\$250	9/19/24	9/19/24	Collections
Phil and Claire Danforth	\$75 (Gift)	\$75	9/19/24	9/19/24	Unrestricted
Susan Alexander	\$50 (Gift)	\$50	9/16/24	9/16/24	Unrestricted
Joe Fox	\$250 (Gift)	\$250	9/15/24	9/15/24	
ABC Foundation	\$2,500 (Gift)	\$2,500	9/14/24	9/14/24	Collections
Phil and Claire Danforth	\$100 (Gift)	\$100	9/20/24	9/14/24	Unrestricted
Total	\$3,275	\$3,275			



Example of pre-built gift report: Funds this year

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Manage

From this page you can build and generate gift reports.

[More info...](#)

Search by Report name

+ New Report

Reorder

Fund report - This year -- PDF

Gifts, pledges, and pledge payments grouped by constituent and fund, with subtotals, for the current fiscal year.

Status: Active

Edit

Copy

Export

Gifts this year -- CSV

All gifts for the current fiscal year, to date

Status: Active

Edit

Copy

Export

Preview



Example of pre-built gift report: Funds this year

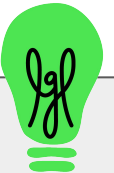
Little Green Light

Printed on: 9/20/24

Gift/Pledge Report (by Fund)

Coverage dates: From 2024-07-01 to 2025-06-30

Constituent	Straight Gift	Total Pledged	Pledge Pmt.	Total Received	Total Balance
Tanner, Brian	\$0	\$0	\$0	\$0	\$0
Collections					
ABC Foundation	\$2,500	\$0	\$0	\$2,500	\$0
Barone, Ray	\$500	\$0	\$0	\$500	\$0
Bueller, Ferris	\$500	\$0	\$0	\$500	\$0
Carey, Drew	\$500	\$0	\$0	\$500	\$0
Hatcher, Peter	\$130	\$0	\$0	\$130	\$0
Madison, Oscar	\$500	\$0	\$0	\$500	\$0
Nelson, Jeremy	\$70	\$0	\$0	\$70	\$0
Soprano, Tony	\$500	\$0	\$0	\$500	\$0
Subtotal: Collections	\$5,200	\$0	\$0	\$5,200	\$0
New Building					
Brandy, Albert	\$80	\$0	\$0	\$80	\$0
Buffay, Phoebe	\$60	\$0	\$0	\$60	\$0
Owens, Theodore	\$80	\$0	\$0	\$80	\$0
Tanner, Brian	\$0	\$600	\$400	\$400	\$200
Subtotal: New Building	\$230	\$600	\$400	\$630	\$200
Unrestricted					
Alexander, Susan	\$50	\$0	\$0	\$50	\$0
Baxter, Joseph	\$80	\$0	\$0	\$80	\$0
Black, Frank	\$160	\$0	\$0	\$160	\$0
Bueller, Ferris	\$60	\$0	\$0	\$60	\$0
Cunningham, Richard	\$130	\$0	\$0	\$130	\$0
Danforth, Phil	\$100	\$0	\$0	\$100	\$0
Geller, Monica	\$110	\$0	\$0	\$110	\$0
Laverne & Shirley	\$80	\$0	\$0	\$80	\$0
Magnum	\$600	\$0	\$0	\$600	\$0
Seaver	\$70	\$0	\$0	\$70	\$0
Tanner, Brian	\$500	\$0	\$0	\$500	\$0
Taylor	\$600	\$0	\$0	\$600	\$0
Subtotal: Unrestricted	\$2,540	\$0	\$0	\$2,540	\$0
Grand Total	\$7,970	\$600	\$400	\$8,370	\$200



Demo:

Pre-built reports



Questions & Answers



FREE Training & Support for LGL Users

- Customer Q&A sessions - small group webinars (No more than 4 people)
- Extensive online [Knowledge Base](#)
- [Video Library](#): Recorded training webinars
- Support by email (M-F 9am-7 pm ET)
- [Subscribe](#) for Fundraising tips/LGL Feature updates



Reporting 101:

Part 2

Presented by Virginia Davidson
Assisted by Emily Fitzsimmons



What we'll cover:

In this session, we'll explore:

- How to create custom reports in LGL
- The difference between Constituents reports & Gift reports
- Tips for troubleshooting your custom reports

All sessions are recorded and will be emailed to you following each session. You can also view all recordings in the [Training Videos section](#) of the LGL Video Library.



Getting started

1. What type of records do you need in your report?
2. What do you need to know about those records?



Examples of constituent reports

What type of records do you need in your report?

Constituents who can receive mail

What do you need to know about those records?

Their name and their mailing address

	A	B	C	D	E	F	G	H	I	J	K	L
1	LGL Constituent ID	Last Name	Addressee 1	Addressee 2	Address Line 1	Address Line 2	Address Line 3	Pref. City	Pref. State/Province	Pref. ZIP/Postal Code	Pref. Address Type	Pref. LGL Address ID
2		576 Brown	Elizabeth Brown	ABC Foundation	10 High St			Boston	MA	02110-1605	Work	586
3		56 Alexander	Mrs. Susan Alexander		185 West 74th Street			New York	NY	10002	Home	56
4		551 Anderson	Gavin and Marie Anderson		93 Ohio Ave			Providence	RI	02905-4303	Home	561
5		216 Appleton	Larry Appleton and his cousin Baki Bartokomous		711 Calhoun Street			Chicago	IL	60603	Home	216
6		16 Mansion	Headquarters of the Avengers		890 Fifth Avenue			Manhattan	NY	10021	Home	16
7		81 Barone	Barone family		320 Fowler Street			Lynbrook	NY	10020	Home	81
8		141 Baxter	Baxter family		123 Marshall Road			Hydsberg	NY	10018	Home	141
9		428 Bing	Chandler Bing		90 Bedford St			New York	NY	10014-3764	Home	431
10		256 Blues	Elwood Blues		1060 West Addison Street			Chicago	IL	60601	Home	256
11		341 Bower	Bower family		3344 Oak Hills Drive			Fairfield	CT	6825	Home	341
12		356 Brady	Mr. and Mrs. Mike Brady		4222 Clinton Way			Los Angeles	CA	90002	Home	356
13		181 Brandy	Brandy family		9764 Jeopardy Lane			Chicago	IL	60604	Home	181
14		96 Bueller	Bueller family		164 North Dutton Street			Shermer	IL	60607	Home	96
15		111 Buffay	Rhodie Buffay		5 Morton St. Apt. 14, New York City New York (Manhattan) USA			New York	NY	10009	Home	111
16		11 Bunker	Bunker family		704 Hauser Street			New York City	NY	10014	Home	11
17		266 Carey	Carey, Drew		720 Sedgewick			Cleveland	OH	44101	Home	266
18		76 Carrington	Blake Carrington		173 Essex Drive			Denver	CO	80201	Home	76
19		381 Cheers	Cheers		112 1/2 Beacon Street			Boston	MA	2101	Home	381
20		31 Clampett	Clampett family		518 Crestview Drive			Beverly Hills	CA	90210	Home	31
21		121 Clayton	Joan Clayton		700 block of North Wilton Place			Los Angeles	CA	90003	Home	121
22		361 Colby	The Colbys		Belvedere Mansion			Los Angeles	CA	90005	Home	361
23		226 Conner	Conner family		714 Delaware			Lanford	IL	60606	Home	226
24		416 Crane	Dr. Frasier Crane and Martin Crane		Apartment 1901, Elliott Bay Towers			Seattle	WA	98101	Home	416
25		136 Cunningham	Cunningham family		565 North Clinton Drive			Milwaukee	WI	53219	Home	136
26		571 Danforth	Phil and Claire Danforth		10336 Dunleer Dr			Los Angeles	CA	90064-4516	Home	581
27		598 Davis	Sarah Davis		552 Madison Ave			Albany	NY	12208-3777	Home	526
28		66 Sugarbaker	Sugarbaker Design Firm		1521 Sycamore			Atlanta	GA	30301	Home	66
29		276 Devereaux	Blanche Devereaux		6151 Richmond Street			Miami	FL	33101	Home	276
30		101 Durden	Durden, Tyler		420 Paper St.			Wilmington	DE	19896	Home	101
31		1 Emerson	Charles Emerson Winchester III		16 Briarcliff Lane			Boston	MA	2102	Home	1
32		126 Evans	The Evans family		321 North Gilbert			Chicago	IL	60605	Home	126
33		61 Ewing	Ewing family		Southfork Ranch			Bradstock County	TX	77578	Home	61
34		201 Fletcher	Jessica Fletcher		698 Candewood Lane			Cabot Cove	ME	3901	Home	201
35		421 Gellar	Monica Gellar		90 Bedford St			New York	NY	10014-3764	Home	421
36		106 Geller	Monica Geller		Apartment 20, 425 Grove Street			New York	NY	10004	Home	106
37		86 Griffin	Griffin family		31 Spooner Street			Quahog	RI	2893	Home	86
38		51 Halliwell	The Halliwell Manor		1329 Prescott Street			San Francisco	CA	94101	Home	51
39		161 Hatcher	Hatcher family		25 West 68th Street			New York	NY	10003	Home	161
40		291 Heffernan	Doug and Carrie Heffernan; Arthur Spooner		3223 Aberdeen Avenue			Rego Park	NY	11374	Home	291
41		386 Hickey	Earl and Randy Hickey		Room 231, The Palms Motel, 9005 Lincoln Blvd			Camden	NJ	8108	Home	386
42		166 Hill	Hank and Peggy Hill		84 Rainey Street			Arlen	TX	78054	Home	166
43		396 Kent	Superman and Lois Lane		1938 Sullivan Lane			Metropolis	NY	10022	Home	396
44		286 Kranden	Kramden family		328 1/2 Chauncey Street			Brooklyn	NY	10015	Home	286



Examples of constituent reports

What type of records do you need in your report?

Constituents who've made gifts this year

What do you need to know about those records?

Their name, plus total giving amounts for this year and last year

	A	B	C	D	E
1	LGL Constituent ID	Last Name	First Name	Total Giving 2024 TG Amount	Total Giving 2023 TG Amount
2	576	Brown	Elizabeth	2500	0
3	56	Alexander	Susan	50	0
4	216	Appleton	Larry	250	0
5	16	Mansion		80	90
6	81	Barone	Ray	650	0
7	141	Baxter	Joseph	190	0
8	186	Black	Frank	290	0
9	256	Blues	Elwood	50	0
10	341	Bower	John	110	0
11	356	Brady	Mike	360	70
12	181	Brandy	Albert	580	0
13	21	Brown	Melinda	80	50
14	96	Bueller	Ferris	860	0
15	111	Buffay	Phoebe	150	0
16	266	Carey	Drew	750	0
17	381	Cheers		500	80
18	31	Clampett	Jed	295	0
19	121	Clayton	Joan	300	0
20	361	Colby	Tina	110	350
21	226	Conner	Sarah	50	0
22	416	Crane	Frasier	45	80
23	136	Cunningham	Richard	240	0
24	571	Danforth	Phil	100	0
25	276	Devereaux	Blanche	200	0
26	61	Ewing	JR	360	0
27	201	Fletcher	Jessica	1200	0
28	106	Geller	Monica	200	0
29	86	Griffin	Archie	800	0
30	51	Halliwell	Burton	650	0
31	161	Hatcher	Peter	130	0
32	291	Heffernan	Doug	300	0
33	386	Hickey	Earl	130	420
34	166	Hill	Hank	110	0
35	396	Kent	Clark	130	90
36	286	Kramden	Ralph	500	0
37	171	Laverne & Shirley		190	0
38	301	Madison	Oscar	700	180
39	176	Magnum		960	0



Examples of constituent reports

What type of record do you need in your report?

Constituents who are board members

What do you need to know about those records?

Their names, plus their total giving amount for this year, and any gifts they've made to the Collections fund

	A	B	C	D	E	F	G	H	I
	Last Name	First Name	Total Giving 2024 TG Amount	Gifts to Collections Gift date	Gifts to Collections Gift amount	Gifts to Collections Gift date 2	Gifts to Collections Gift amount 2	Gifts to Collections Gift date 3	Gifts to Collections Gift amount 3
1	Barone	Ray	650	8/16/2024	500	3/23/2024	90		
2	Brown	Melinda	80	2/23/2024	80				
3	Emerson	Charles	0						
4	Fletcher	Jessica	1200	11/23/2022	1800				
5	Fox	Joe	750						
6	Geller	Monica	200						
7	Nelson	Jeremy	430	7/23/2024	70				
8	Owens	Theodore	220						
9	Scavo	Lynette	200	4/23/2024	110				
10	Soprano	Tony	500	8/16/2024	500				
11	Winfield	Sandy	360	2/23/2023	130				



Example of a gift report

What type of record do you need in your report?

Gifts made in September

What do you need to know about those records?

The gift amount, gift date, campaign, fund, appeal, and name of constituent who made the gift

	A	B	C	D	E	F	G
1	Last Name	First Name	Gift date	Amount	Campaign	Fund	Appeal
2	Danforth	Phil	9/20/2024	50	Annual Giving	Unrestricted	
3	Kelly	Kathleen	9/19/2024	250	Annual Giving	Collections	2024 Year End Appeal
4	Danforth	Phil	9/19/2024	75	Annual Giving	Unrestricted	2024 Year End Appeal
5	Alexander	Susan	9/16/2024	50	Annual Giving	Unrestricted	2024 Summer Survey
6	Fox	Joe	9/15/2024	250	Annual Giving		2024 Year End Appeal
7	Brown	Elizabeth	9/14/2024	2500	Annual Giving	Collections	
8	Danforth	Phil	9/14/2024	100	Annual Giving	Unrestricted	2024 Summer Survey



Difference between a constituent report and a gift report

Constituent report: Each constituent who meets your search criteria will only be listed in your report once. If you search for constituents who've made gifts in 2024, a constituent's name will only be listed once - even if they made multiple gifts in that time period.

Gift report: Each gift record that meets your search criteria will be listed on its own row in your report. A constituent's name will be listed with each gift record that meets your search criteria. Since Phil Danforth made three gifts in September, his name is correctly listed three times in your gift report - once with each gift record.



Two key steps to shape your report:

Search: What type of record do you need in your report?

- If you need constituent records, navigate to the Constituents page and search there.
- If you need gift records, navigate to Fundraising → Giving and search there.

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

- Select the fields you want to include, which will appear as columns of data on your exported spreadsheet



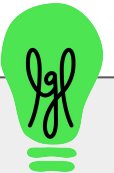
Steps to create a custom constituent report



Example 1:

I need to see all our constituents who can receive mail, and I need to know:

- **Their preferred address**



Step 1: Run your search on the Constituents page and click Export results

Mailings

Forms

Settings

Search by name, email or ID

+ Add constituent

Send mail

Send email

Export results

Advanced Search

Show constituents where

Saved Searches: Global searches

All of the following are true

Restrict by: Event Appeal

Can send mail?

Add more criteria · Advanced options

Save this search New Search

Search

Results 1 - 25 of 95

0 selected constituents

Select 95 Deselect 95 Show all

Constituent

ABC Foundation

Contact: Elizabeth Brown

Elizabeth Brown

ABC Foundation

10 High St

Boston, MA 02110-1605

Actions

Stewards

Contact types

Groups

Volunteer Interest

Primary

Giving summary (all time)

Gifts 1 / \$2,500

Last Gift \$2,500 Gift on 2024-09-14



Step 2: Customize (Select fields)

Ready to export 95 constituents. Add/remove in the Search tab.

Your report has 5 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

Constituent Fields

Constituent Category Fields

Contact Info. Fields

Gift/Pledge/Goal Fields

Appeal & Event Fields

Add all | Remove all

☒ Preferred Address

☐ Home Address

☐ Work Address

☐ Other Address

☐ School Address

☐ Multiple Mailing Addresses

☐ Preferred Email

☐ Home Email

☐ Work Email

☐ Other Email

☐ Assistant Email

☐ Multiple Emails

☐ Preferred Phone

☐ Home Phone

☐ Work Phone

☐ Mobile Phone

☐ Other Phone

☐ Skype Phone

☐ Fax Phone

☐ Assistant Phone

☐ Pager Phone

☐ Multiple Phone Numbers

☐ Multiple Websites

LGL Constituent ID

Last Name

First Name

Addressee

☒ Split multiple lines into two columns?

Name

Addressee

Preferred Address

Select columns to include

☒ Pref. Street

☒ Split (Address 1,2,3)? ☐ Street number column?

☒ Pref. City

☒ Pref. State/Province

☒ Pref. ZIP/Postal Code

☐ Pref. County

☐ Pref. Congressional



Step 3: Preview your report

1. Search 2. Customize 3. Preview 4. Save Export

Ready to export **95** constituents. Add/remove in the Search tab.

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

Preview shows up to the first 100 rows and all columns from your report.

LGL Constituent ID	Last Name	First Name	Addressee 1	Addressee 2	Address Line 1	Address Line 2	Address Line 3	Pref. City	Pref. State/ Province	Pre Pos
576	Brown	Elizabeth	Elizabeth Brown	ABC Foundation	10 High St			Boston	MA	021
56	Alexander	Susan	Mrs. Susan Alexander		185 West 74th Street			New York	NY	100
551	Anderson	Gavin	Gavin and Marie Anderson		93 Ohio Ave			Providence	RI	029
216	Appleton	Larry	Larry Appleton and his cousin Balki Bartokomous		711 Calhoun Street			Chicago	IL	606
16	Mansion		Headquarters of the Avengers		890 Fifth Avenue			Manhattan	NY	100
81	Barone	Ray	Barone family		320 Fowler Street			Lynbrook	NY	100
141	Baxter	Joseph	Baxter family		123			Hydsberg	NY	100

Use the scroll bar
to see more
columns



Step 4: Save export

1. Search
2. Customize
3. Preview
4. Save Export

Ready to export 95 constituents. Add/remove in the Search tab.

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

Save export

Export Name

Description

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

[Save Export](#) or [Cancel](#)



Download

Reports

- Constituent Reports
- Gift/Pledge Reports
- Goal Reports
- Contact Rpt. Reports
- Task Reports
- Volunteering Reports
- More Reports

[Reports](#) [Archived reports](#) [Scheduled reports](#) [Archived Scheduled reports](#) [Exports](#) [Archived exports](#)

Search exports

Name	Date created
<input type="text"/>	<div>All dates</div> <div><input type="text"/> to <input type="text"/></div>

Results 1 - 13 of 13

Export

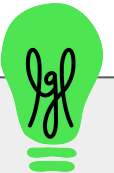
[⬇️ Appeal mailing list for mail house](#) — Ready for download



Example 2:

I need to see all our board members, and I need to know:

- **Their total giving amount for this year**
- **Any gifts they've made that are coded to the Collections fund**



Step 1: Run your search on the Constituents page and click Export results

+ Add constituent

✉ Send mail

✉ Send email

📄 Export results

Advanced Search

Show constituents where

Saved Searches: ---- Global searches ----

All of the following are true

Restrict by: Event Appeal

✕ Groups

includes any

Board Member

Edit

Add more criteria · Advanced options ?

📄 Save this search

New Search

Q Search

Results 1 - 11 of 11

0 selected constituents

Select 11

Deselect 11

Show all

☐ Constituent

Giving summary (all time)

☐ Barone, Ray
Everybody Loves Raymond
Barone family
320 Fowler Street
Lynbrook, NY 10020
US
888-555-0017
barone@everybodylovesraymond....
ID: 81

⚙ Actions

Class Years--
Stewards--
MembershipSilver (former)
Expired: 2024-08-23
First membership start: 2023-08-23
Contact typesPrimary
GroupsBoard Member
Volunteer Interest--
Communication Tags--
Edit categories

Gifts5 / \$1,010
Last Gift\$500 Gift
on 2024-08-16

☐ Brown, Melinda
Back to the Future
Melinda Brown
1840 Duaneville Drive

⚙ Actions

Class Years--
Stewards--
Membership--

Gifts7 / \$910
Last Gift\$80 Gift
on 2024-02-23

www.littlegreenlight.com

Step 2: Customize (Select fields)

1. Search
2. Customize
3. Preview
4. Save Export

Cancel

Ready to export 11 constituents. Add/remove in the Search tab.

BackNext

Your report has 5 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

Constituent Category Fields

Contact Info. Fields

Gift/Pledge/Goal Fields

Appeal & Event Fields

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

☐ Total Giving (this fiscal)

☐ Total Giving (last fiscal)

☒ Total Giving (custom)

☐ Total Giving (range)

☐ Consecutive Years of Giving

☒ Gifts

☐ First Gift

☐ Last Gift

☐ Largest Gift

☐ Goals

☐ Goal list

LGL Constituent ID

Customize

Last Name

Customize

First Name

Customize

Total Giving (custom)

Add another

Customize

Label Prefix

Total Giving 2024

Select columns to include

☒ Amount

TG Amount

☐ Deductible

TG Deductible

☐ Count

TG Count



Important field: Total Giving (custom)

Total Giving (custom) Customize column header

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"/>

Total Giving (custom)

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"/>

Customization Parameters

Choose the criteria by which gift information will be restricted

Gift Types	include	Select
Campaigns	include	Select
Funds	include	Select
Appeals	include	Select
Events	include	Select
Gift Categories	include	Select
Payment Types	include	Select
Pledge amount vs. balance	Balance	?
Is Pledge Payment?	Yes or No	?
Date range	Custom dates	2024-01-01 to 2024-12-31
Single gift amount	is greater/equal	\$

Use parameters to restrict gifts used in calculation



Important field: Gifts

Gifts

Label Prefix

Select columns to include

☒ *Gift date*

☐ *Deposit date*

☒ *Gift amount*

☐ *Deductible amt.*

Customization Parameters

Choose the criteria by which gift information will be restricted

Gift Types

Campaigns

Funds Collections

Appeals

Events

Gift Categories

Payment Types

Is Pledge Payment?

Date range

Single gift amount

Count

Remember to set the count !



Step 3: Preview your report

1. Search 2. Customize 3. Preview 4. Save Export

Ready to export 11 constituents. Add/remove in the Search tab.

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

Preview shows up to the first 100 rows and all columns from your report.

LGL Constituent ID	Last Name	First Name	Total Giving 2024 TG Amount	Gifts to Collections Gift date	Gifts to Collections Gift amount	Gifts to Collections Gift date 2	Gifts to Collections Gift amount 2	Gifts to Collections Gift date 3	Gifts to Collections Gift amount 3
81	Barone	Ray	650.0	2024-08-16	500.0	2024-03-23	90.0		
21	Brown	Melinda	80.0	2024-02-23	80.0				
1	Emerson	Charles	0.0						
201	Fletcher	Jessica	1200.0	2022-11-23	1800.0				
596	Fox	Joe	750.0						
106	Geller	Monica	200.0						
151	Nelson	Jeremy	430.0	2024-07-23	70.0				
196	Owens	Theodore	220.0						
71	Scavo	Lynette	200.0	2024-04-23	110.0				
316	Soprano	Tony	500.0	2024-08-16	500.0				
376	Winfield	Sandy	360.0	2023-02-23	130.0				



Step 4: Save export

1. Search
2. Customize
3. Preview
4. Save Export

Ready to export 11 constituents. Add/remove in the Search tab.

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

Save export

Export Name

Description

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

[Save Export](#) or [Cancel](#)



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Reports

- Constituent Reports >
- Gift/Pledge Reports
- Goal Reports
- Contact Rpt. Reports
- Task Reports
- Volunteering Reports
- Note Reports

Reports Archived reports Scheduled reports Archived Scheduled reports 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"/>

Results 1 - 9 of 9

Export

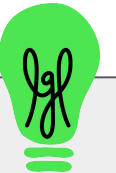
[Board member giving 2024](#) — Ready for download

Type: Constituent · Created by: Virginia Davidson · Updated on: 2024-09-23 at 03:34 PM



End result:

	A	B	C	D	E	F	G	H	I
	Last Name	First Name	Total Giving 2024 TG Amount	Gifts to Collections Gift date	Gifts to Collections Gift amount	Gifts to Collections Gift date 2	Gifts to Collections Gift amount 2	Gifts to Collections Gift date 3	Gifts to Collections Gift amount 3
1	Barone	Ray	650	8/16/2024	500	3/23/2024	90		
2	Brown	Melinda	80	2/23/2024	80				
3	Emerson	Charles	0						
4	Fletcher	Jessica	1200	11/23/2022	1800				
5	Fox	Joe	750						
6	Geller	Monica	200						
7	Nelson	Jeremy	430	7/23/2024	70				
8	Owens	Theodore	220						
9	Scavo	Lynette	200	4/23/2024	110				
10	Soprano	Tony	500	8/16/2024	500				
11	Winfield	Sandy	360	2/23/2023	130				
12									



Demo:

Create a custom report

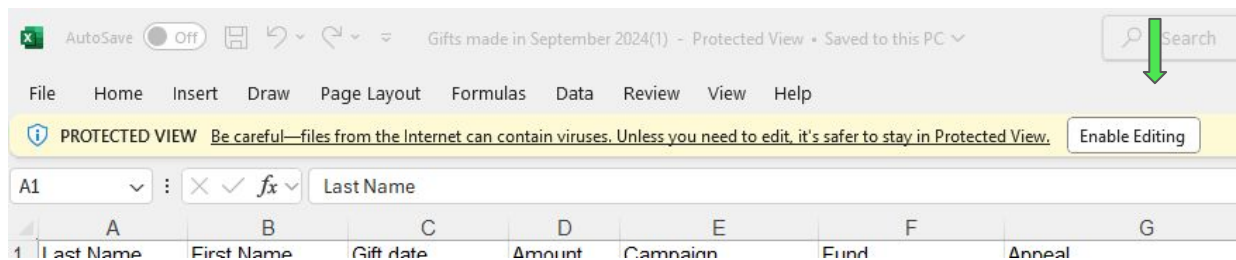


Steps to troubleshoot a custom report



Tips for troubleshooting a custom report

- Confirm that you created the type of report that suits your needs (Constituent vs. gift)
- Examine a record and check it against your search criteria
- Check the customization of fields (such as Gifts) and check it against the coding of a gift record
- If data doesn't appear in your export, click Enable Editing:



	A	B	C	D	E	F	G	H	I
	Last Name	First Name	Total Giving 2024 TG Amount	Gifts to Collections Gift date	Gifts to Collections Gift amount	Gifts to Collections Gift date 2	Gifts to Collections Gift amount 2	Gifts to Collections Gift date 3	Gifts to Collections Gift amount 3
1	Barone	Ray	650	8/16/2024	500	3/23/2024	90		
2	Brown	Melinda	80	2/23/2024	80				
3	Emerson	Charles	0						
4	Fletcher	Jessica	1200	11/23/2022	1800				
5	Fox	Joe	750						
6	Geller	Monica	200						
7	Nelson	Jeremy	430	7/23/2024	70				
8	Owens	Theodore	220						
9	Scavo	Lynette	200	4/23/2024	110				
10	Soprano	Tony	500	8/16/2024	500				
11	Winfield	Sandy	360	2/23/2023	130				
12									

Problems:

- Joe Fox's gift to the Collections fund isn't listed
- Our new board member, Kathleen Kelly, isn't listed



Demo:

Troubleshooting a custom constituent report



Questions & Answers



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