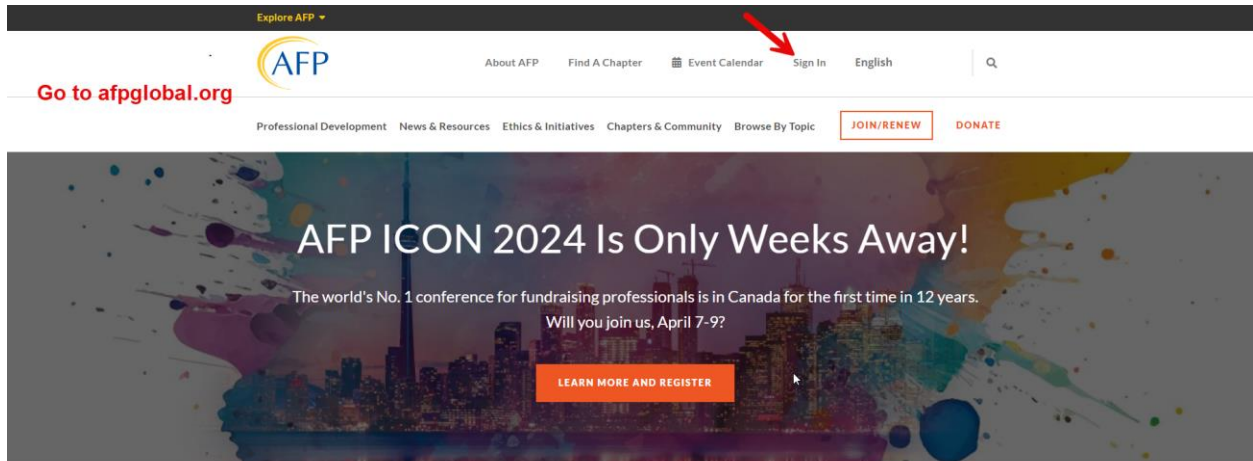


INSTRUCTIONS TO DOWNLOAD FOUNDATION REPORTS

April 1, 2024

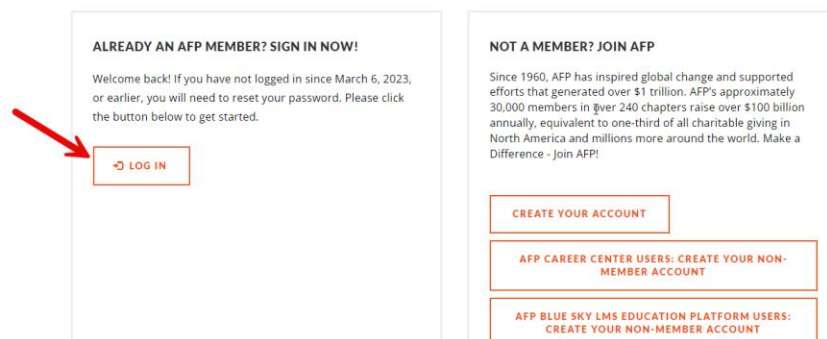
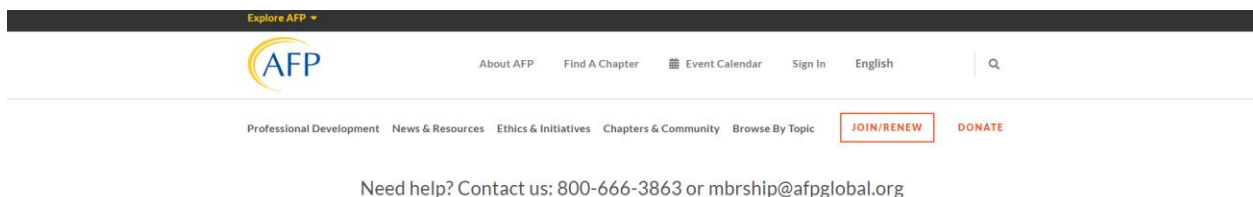
Step 1: Go to afpglobal.org



WHAT'S NEW AT THE ASSOCIATION OF FUNDRAISING PROFESSIONALS

Step 2: Log in to your personal account

- If you are designated as the Foundation development chair (FDC), Every Member Campaign Chair (EMC), or Chapter Administrator, your account has been coded to allow access to the Foundation reports.
 - If you don't have this access, please contact foundation@afpglobal.org for the US foundation and cdnfoundation@afpglobal.org for the Canada Foundation to get this fixed.



Log In

Email

Password

Log In

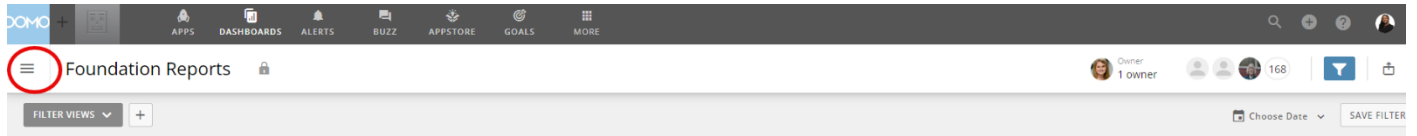
[Forgot your password?](#)
[Don't have an account?](#)

Step 3: Once logged in please scroll down to the Chapter Report section and select AFP Chapter Foundation Reports

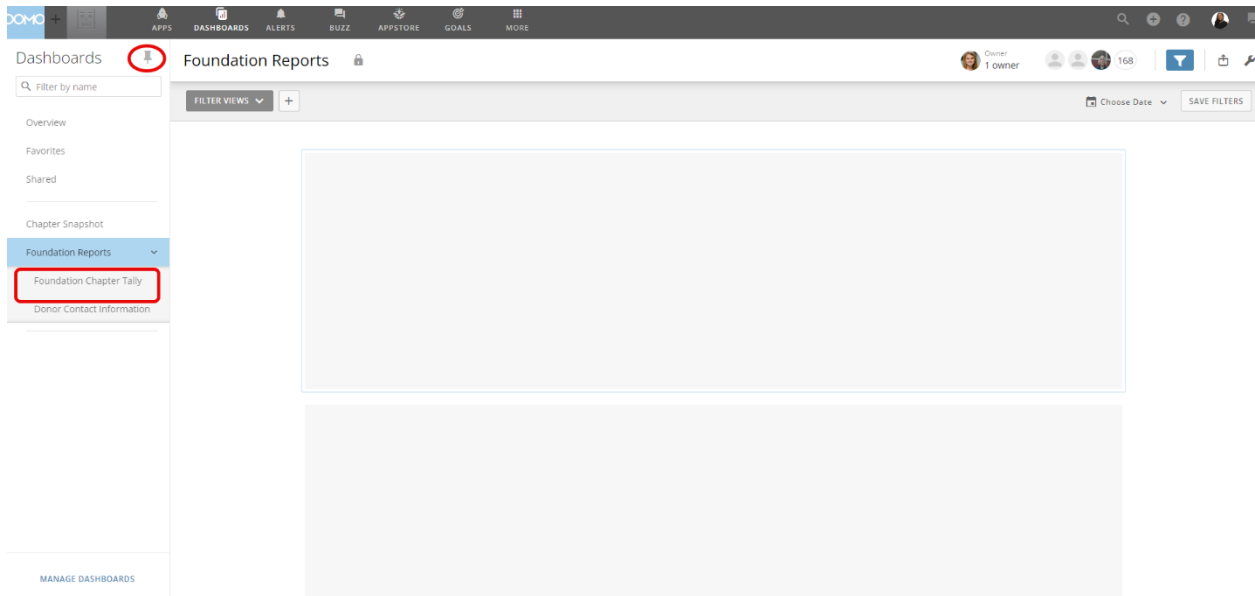
The screenshot shows the AFP member dashboard. At the top, there is a navigation bar with the AFP logo, 'About AFP', 'Find A Chapter', 'Event Calendar', 'Welcome, Ayat Hassan', 'English', and a search icon. Below this is a secondary navigation bar with links for 'Professional Development', 'News & Resources', 'Ethics & Initiatives', 'Chapters & Community', 'Browse By Topic', and buttons for 'JOIN/RENEW' and 'DONATE'. The main content area is divided into three columns. The left column is titled 'MEMBER PROFILE' and includes links for 'My AFP Information', 'My Name & Profile', 'My Home and Business Address(es)', 'My Email | Fax | Phone Information and Preferences', 'My Communication Preferences', 'My Communication Opt-in/Opt-out Preferences (Including Advancing Philanthropy delivery)', 'My Committees', 'My Demographics', 'My Affinity Groups', 'Member Directory', and 'Renew My AFP Membership'. The middle column is titled 'ACCOUNT DETAILS' and includes 'Reset Password' and 'Sign Out'. Below this is the 'ORDERS & DONATIONS' section with links for 'My Shopping Cart', 'Transaction History', 'Manage Your Payment Method', 'Donate to AFP Foundations', and 'Donation History'. At the bottom of the middle column is the 'CHAPTER REPORTS' section, which contains 'AFP Chapter Membership Reports' and 'AFP Chapter Foundation Reports'. A red arrow points to 'AFP Chapter Foundation Reports'. The right column contains 'MY BOOKMARKS' with the text 'Bookmarked content will appear here.' and a 'VIEW ALL' button, and 'MY INTERESTS' with a 'CUSTOMIZE' button.

The system will take you directly to the new reporting tool called Domo.

Step 4: Click on the menu button





You will then see the Dashboard menu. I recommend pinning it. After that please select the Foundation Chapter Tally option. This will allow you to see the report.



FOUNDATION CHAPTER TALLY (for Donor Contact Information go to Step 11)

Step 5: Select Foundation Chapter Tally

Foundation Chapter Tally  Owner 1 owner 18 Choose Date SAVE FILTER

FILTER VIEWS  Add filters to your Dashboard to find new insights.

Chapter Name
Select

Chapter Low Goal **\$250**


Chapter High Goal **\$28,507**


Chapter Tally | | All Time

	AFP ID	Donor Name	Order Item Transaction Date	Donations	Pledges	Total Pledge & Donation Amount	Total Payment Received	Balance	Alpha Flag
Donation Details			2023-03-20	\$511.00	\$0.00	\$511.00	\$511.00	\$0.00	Non-Alpha
			2024-01-30	\$100.00	\$0.00	\$100.00	\$100.00	\$0.00	Non-Alpha
			2023-12-26	\$485.74	\$0.00	\$485.74	\$485.74	\$0.00	Non-Alpha
			2023-12-20	\$1,769.40	\$0.00	\$1,769.40	\$1,769.40	\$0.00	Non-Alpha
			2023-12-20	\$240.00	\$0.00	\$240.00	\$240.00	\$0.00	Non-Alpha
			2023-04-11	\$50.00	\$0.00	\$50.00	\$50.00	\$0.00	Non-Alpha
			2023-05-09	\$20.00	\$0.00	\$20.00	\$20.00	\$0.00	Alpha
			2023-01-18	\$10.00	\$0.00	\$10.00	\$10.00	\$0.00	Non-Alpha

This is just the first page that appears. You **must** apply filters for chapter and date range.

Step 6: Choose your chapter. In most cases you will only see a single chapter to select. For those of you administrating multiple chapters, you will see the list to choose from.

Foundation Chapter Tally  Owner 1 owner 18 Choose Date SAVE FILTERS

FILTER VIEWS  Add filters to your Dashboard to find new insights.

Chapter Name
Select

Search below values...

Clear all selections (0)

- AFP AK, Alaska Chapter
- AFP AL, Alabama Chapter

Step 7: After selecting your chapter next choose the date range to This Year

Foundation Chapter Tally

in Foundation Reports

Owner 1 owner

18

1

FILTER VIEWS + Donation Chapter Name in AFP At-Large US

Choose Date SAVE FILTERS

Chapter Name

AFP At-Large US

Chapter Low Goal

There is not a donation goal for the date range selected

Chapter High Goal

There is not a donation goal for the date range selected

Chapter Tally | AFP At-Large US | All Time

AFP ID Donor Name Order Item Transaction Date Donations Pledges Total Pledge & Donation Amount Total Payment Received

Date range

Default Use each Card's own date range

All Time

Current

Today

This Week

This Month

This Quarter

This Year

PERIOD TO DATE

Week to Date

Month to Date

Quarter to Date

Click on This Year to see the most recent donor giving information.

Step 8: Next you will see the current year low and high goal as well as donor giving.

Foundation Chapter Tally

in Foundation Reports

Owner 1 owner

17

2

FILTER VIEWS + Donation Chapter Name in AFP At-Large US

Choose Date This Year SAVE FILTERS

AFP At-Large US

Chapter Low Goal

\$1,000

Chapter High Goal

\$500

Chapter Tally | AFP At-Large US | This Year

	AFP ID	Donor Name	Order Item Transaction Date	Donations	Pledges	Total Pledge & Donation Amount	Total Payment Received	Balance	Alpha Flag
- Donation Details									
			2024-01-18	\$0.00	\$1,200.00	\$1,200.00	\$200.00	\$1,000.00	Alpha
			2024-02-27	\$25.00	\$0.00	\$25.00	\$25.00	\$0.00	Non-Alpha
			2024-02-07	\$0.00	\$1,000.00	\$1,000.00	\$250.00	\$750.00	Non-Alpha
			2024-03-22	\$75.00	\$0.00	\$75.00	\$75.00	\$0.00	Alpha
			2024-03-09	\$30.00	\$0.00	\$30.00	\$30.00	\$0.00	Alpha
			2024-03-28	\$5.00	\$0.00	\$5.00	\$5.00	\$0.00	Non-Alpha
			2024-02-16	\$0.00	\$200.00	\$200.00	\$50.00	\$150.00	Alpha
Donation Details TOTAL			Count 0	\$135.00	\$2,400.00	\$2,535.00	\$635.00	\$1,900.00	Count 7 / 7
GRAND TOTAL		Count 7	Count 7	\$135.00	\$2,400.00	\$2,535.00	\$635.00	\$1,900.00	Count 7

On this report it will show you Donor ID, Name, date of gift/pledge, payment and balance, and whether or not they are an Alpha Society member (monthly recurring gift). At the bottom of the report, the totals will be displayed.

Step 9: To export the report, hover over the table and a wrench will appear on the top right corner. Click on the arrow/wrench and options will appear. Select Send/Export.

FILTER VIEWS + Add filters to your Dashboard to find new insights. Choose Date SAVE FILTERS

Chapter Name
Select

Donations with Mailing Info

Donor Name	Donor Title	CFRE	ACFRE	Order Item Transaction Date	Product Name	Billing Street	Billing City	Billing Zip/Postal Code	Billing Country	Phone	Donor Email	Alpha Flag	Billing State/Province
		true	false	2023-07-03	2023 BE the CAUSE Gift				United States			Non-Alpha	CA
		false	false	2023-07-03	2023 BE the CAUSE Pledge				United States			Non-Alpha	NC
		false	false	2023-07-04	2023 BE the CAUSE Pledge				United States			Non-Alpha	NY
		false	false	2023-07-05	2023 BE the CAUSE Pledge				United States			Non-Alpha	NY

This is just the first page that appears. You **must** apply filters for chapter and date range.

Step 12: Choose your chapter. In most cases you will only see a single chapter to select. For those of you administrating multiple chapters, you will see the list to choose from.

FILTER VIEWS + Add filters to your Dashboard to find new insights. Choose Date SAVE FILTERS

Chapter Name
Select

Search below values...

Clear all selections (0)

- AFP AK, Alaska Chapter
- AFP AL, Alabama Chapter

Step 13: After selecting your chapter next choose the date range

FILTER VIEWS + Donation Chapter Name in AFP At-Large US Choose Date SAVE FILTERS

Chapter Name
AFP At-Large US

Donations with Mailing Info

Donor Name	Donor Title	CFRE	ACFRE	Order Item Transaction Date	Product Name	Billing Street	Billing City	Billing Zip/Postal Code	Billing Country	Phone	Donor Email	Alpha	Billing State
	Executive Director	true	false	2023-07-09	Alpha Society Recurring Monthly Gift				United States			Alpha	
		false	false	2023-07-20	Alpha Society				United States			Alpha	VA

Date range

Default

Default Use each Card's own date range

All Time

Current

Today

This Week

This Month

This Quarter

This Year

PERIOD TO DATE

Click on This Year to see the most recent donor contact information.

Step 14: To export the report, hover over the table and a wrench will appear on the top right corner. Click the arrow/wrench and options will appear. Select Send/Export

The screenshot shows the 'Donor Contact Information' report interface. At the top, there's a filter for 'Donation Chapter Name' set to 'AFP At-Large US'. Below this is a table titled 'Donations with Mailing Info'. A red arrow points to a wrench icon in the top right corner of the table, which has opened a context menu. The menu options include 'Details', 'Schedule as Report', 'Edit Scheduled Reports', 'Send Now', 'Send / Export' (highlighted with a red arrow), 'Request certification', 'Add to Favorites', and 'Notify me on issues'.

Donor Name	Donor Title	CFRE	ACFRE	Order Item Transaction Date	Product Name	Billing Street	Billing City	Billing Zip/Postal Code	Billing Country	Phone	Donor Email
	Executive Director	true	false	2024-01-09	Alpha Society Recurring Monthly Gift			23509-2226	United States		
		false	false	2024-01-22	Alpha Society Recurring Monthly Gift			20171	United States		
	Retired	false	true	2024-02-07	2024 BE the CAUSE			30546-3436	United States		

Step 15: This option will appear after selecting Send/Export. We recommend the Excel option. Your spreadsheet will be in your download files titled "Donations with Mailing Info".

The screenshot shows the 'Send / Export: Donations with Mailing Info' dialog box. It contains five options: 'Email', 'Print', 'Excel' (circled in red), 'CSV', and 'PowerPoint'. The background shows the same report table as in the previous screenshot, but it is dimmed.