INSTRUCTIONS TO DOWNLOAD FOUNDATION REPORTS

April 1, 2024

Step 1: Go to afpglobal.org

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

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

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 administering multiple chapters, you will see the list to choose from.

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

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.
Step 10: This option will appear after selecting Send/Export. We recommend the Excel option. Your spreadsheet will be in your download files titled “Chapter Tally”.

DONOR CONTACT INFORMATION REPORT

Step 11: Select Donor Contact Information
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.

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

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 on the arrow/wrench and options will appear. Select Send/Export.

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”.

[Image of the report export process]

[Image of the Send/Export window with the Excel option highlighted]