ASSOCIATION OF FUNDRAISING PROFESSIONALS
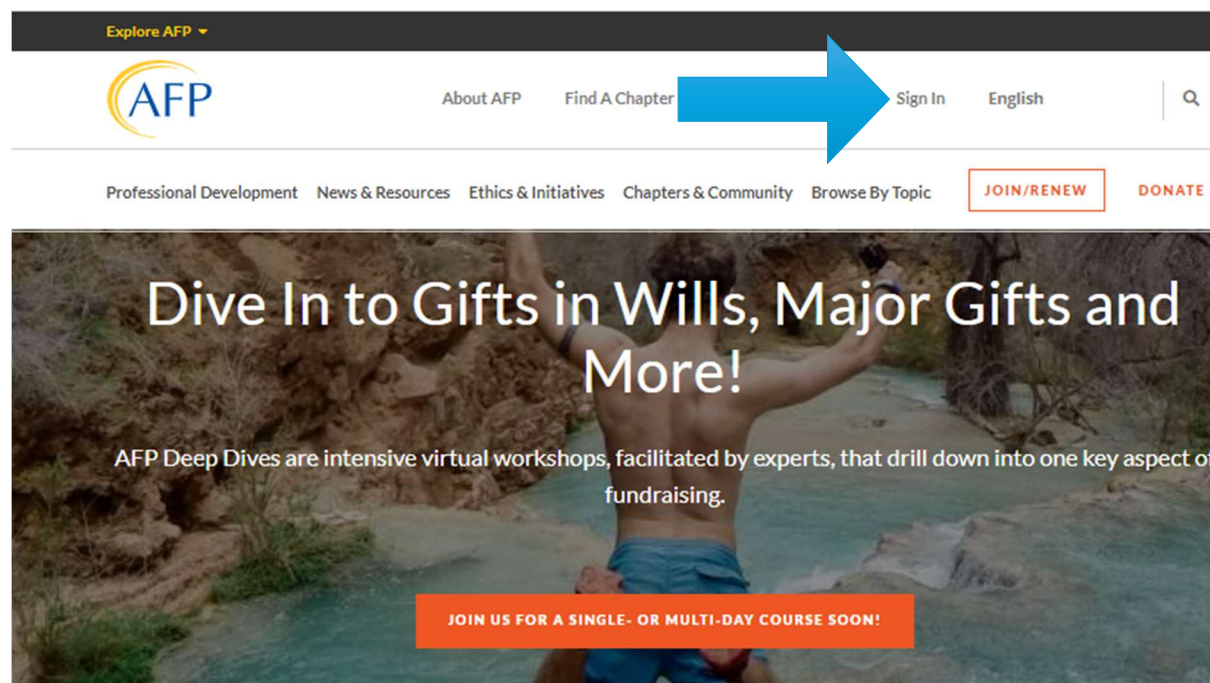## Chapter Reports Portal Guidelines

April 2024

WHO CAN ACCESS THE PORTAL

There is no limit to the number of individuals from your chapter board who can access the chapter reports portal, DOMO. By default AFP Global will provide portal access to each **chapter president, membership chair, administrator and foundation development chair**. If you find that there is a different individual in your chapter leadership who should have access please contact AFP Global at chapter.engagement@afpglobal.org.

HOW TO ACCESS THE PORTAL

Step1: Navigate to www.afpglobal.org

Step 2: Log in to your individual account

Step 3: Under your name, click 'My Account' and select AFP Chapter Membership Reports or AFP Chapter Foundation Reports.

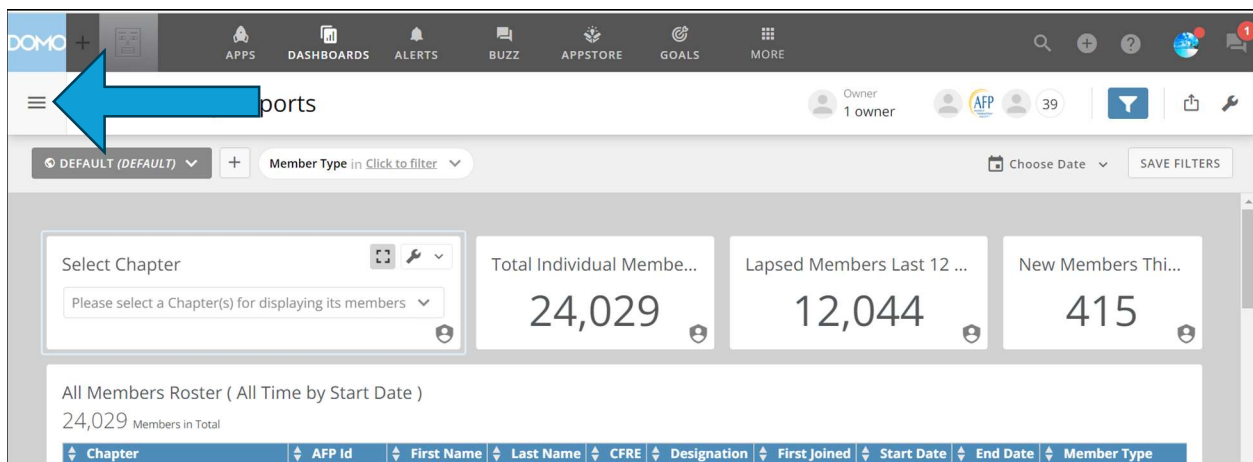Both of these links will take you to the new chapter reports portal, Domo.
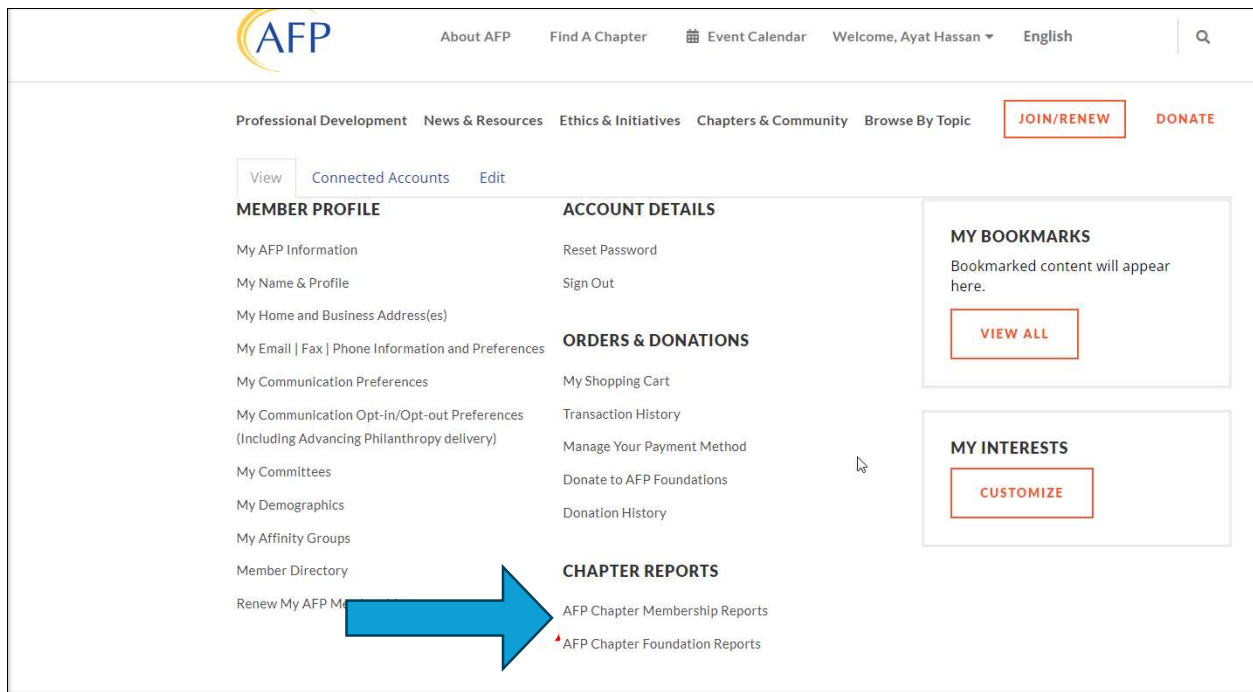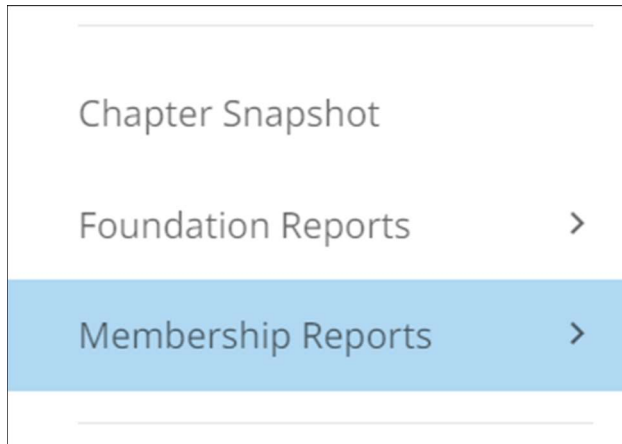

HOW TO FIND WHAT YOU NEED IN DOMO

ACCESS MENU:

If the menu does not appear initially it may depend on the device you are using. Click on the menu icon to view the full menu.

Menu Options: Select the option of your choice from the reports portal menu

Chapter Snapshot: This chapter overview shares summary data for your chapter and in the future will include some multi-year trend information as AFP Global continues to add functionality to the portal.

Foundation Reports: Foundation reports for your chapter can be viewed here. View all on one page or click on each report to view individually.

Membership Reports: Here you can find every available membership report. See all reports on one screen or click on the individual report name in the menu to view them one at a time.
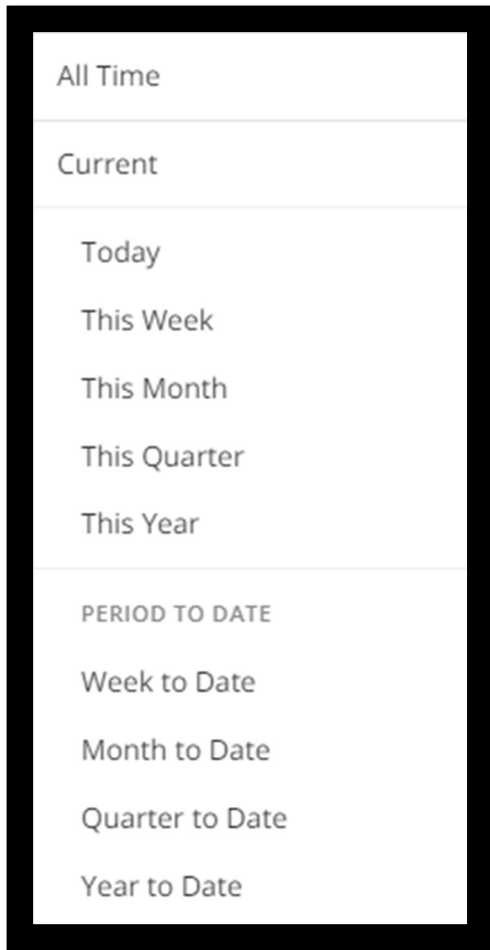
DOMO refers to reports as 'cards'.

Choose your chapter. When you navigate to a different page or select a new report you will need to select your chapter. In most cases you will only see a single chapter to select in the dropdown. For those of you administrating multiple chapters, you will see a short list to choose from.

MEMBERSHIP REPORTS

Step 1: Select your chapter

Note: If you click on 'Membership Reports' all reports will appear top to bottom on the same page with the exception of the Point In Time Membership report. You can also click each report individually from the menu

Applying Date Filters:

View your reports with their default date range settings or **Click 'Choose Date'** in the header menu to pick the type of date range that you want.

Review your report with the default time period or **Pick a menu option** to apply to your reports:


Exporting Report Data:

To export the report, **hover over the table and a wrench will appear** in the top right corner. Click on the arrow/wrench and options will appear.


All Members Roster (All Time by Start Date)

24,029 Members in Total

Chapter	AFP Id	First Name	Last Name	CFRE	Designation	First Joined	Start Date	End Date	Member Type
				false		11-08-2002	03-01-2024	02-28-2025	USD Large Non-Pro
				true		11-19-2002	01-01-2024	12-31-2024	CAD Professional (
				true		11-15-2002	01-01-2024	12-31-2024	USD Professional (
				false		11-15-2002	07-01-2024	06-30-2025	CAD Associate (1yr
				false		11-22-2002	01-01-2024	12-31-2024	USD Retired (1yr)
				false		03-11-2010	04-01-2024	03-31-2025	USD Professional (
				false	BA	06-29-1992	01-01-2024	12-31-2024	CAD Professional (
				true		06-29-1992	03-01-2024	02-28-2025	CAD Large Non-Pro

From the menu select **Send/Export:**
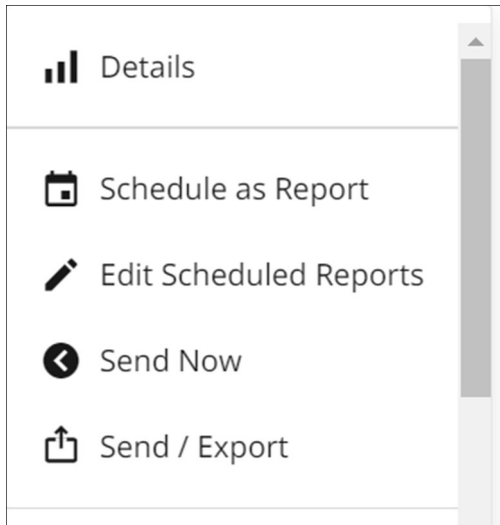
We recommend the Excel option. Your spreadsheet will be in your device download files.
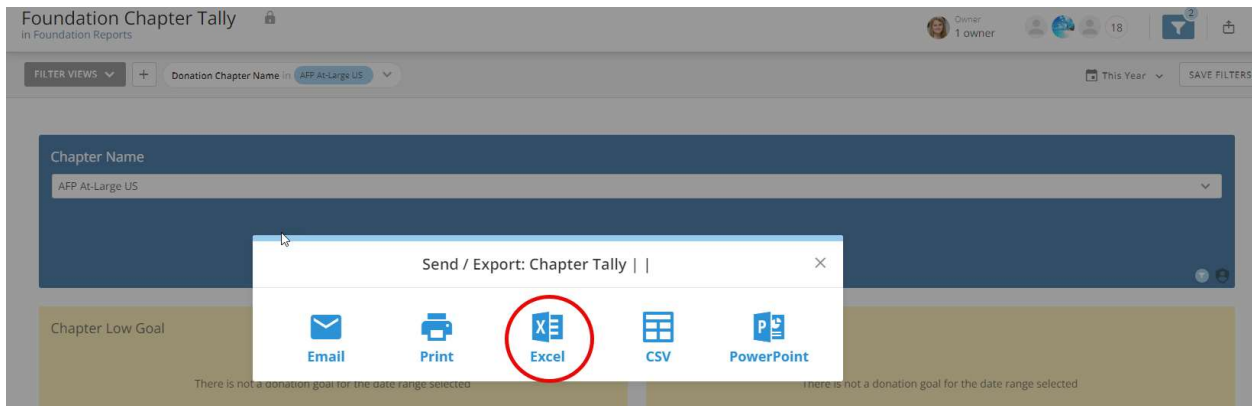
1. **CURRENT MEMBER ROSTER REPORT**

Select your chapter. The report will default to your current members as of the day that you run the report.
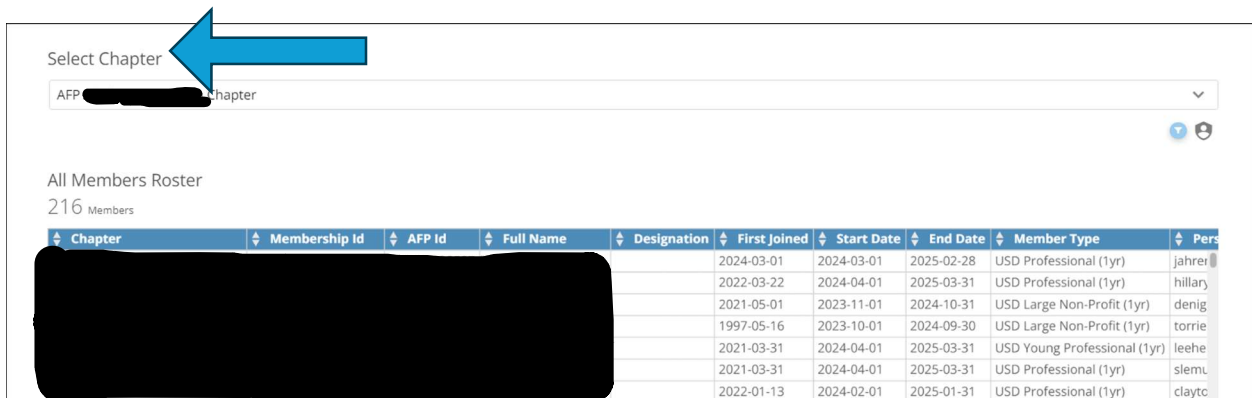
2. POINT IN TIME MEMBERS REPORT

Select a date to view your chapter member roster as of that date.

3. NEW MEMBERS REPORT

4. RENEWED MEMBERS REPORT

5. LAPSED MEMBERS REPORT

FOUNDATION REPORTS

1. CHAPTER TALLY REPORT
Select your **chapter name** as before.

Choose the date range of 'This Year' to see the most recent donor giving information.

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.
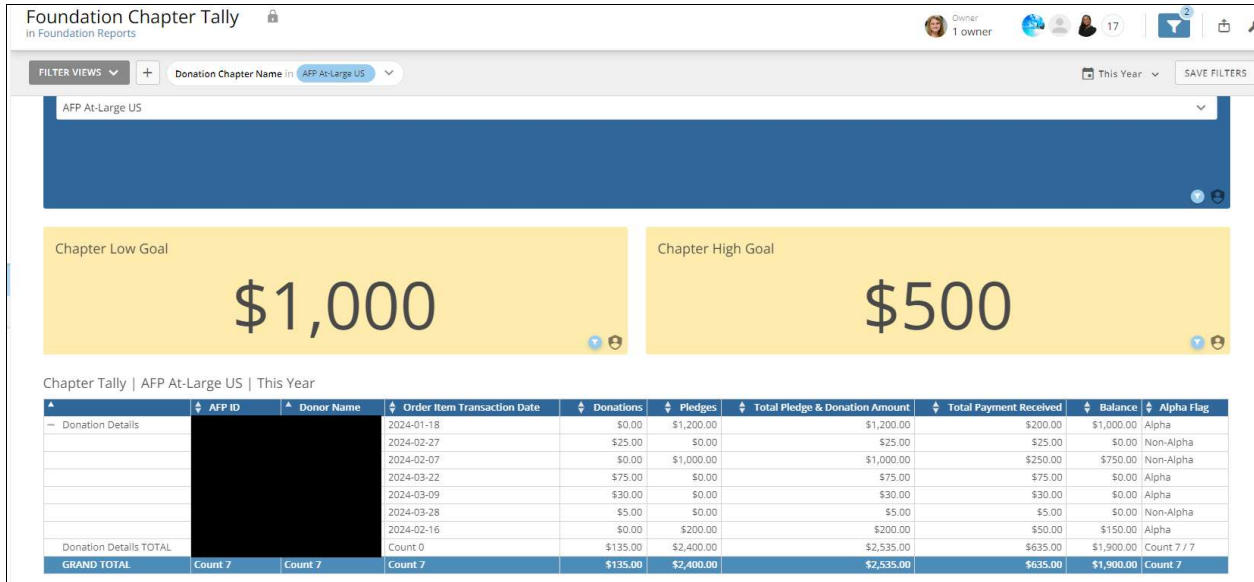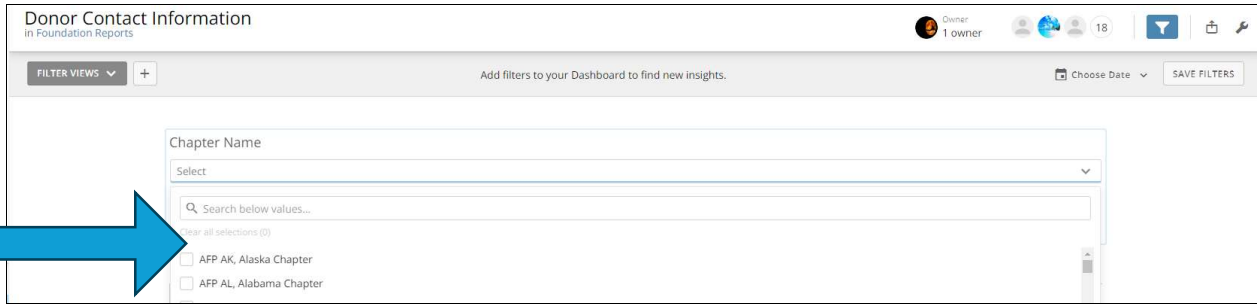

2. DONOR CONTACT INFORMATION REPORT

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

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.

After selecting your chapter next **choose the date range.** Click on **This Year** to see the most recent donor contact information.