ASSOCIATION OF FUNDRAISING PROFESSIONALS Chapter Reports Portal Guidelines

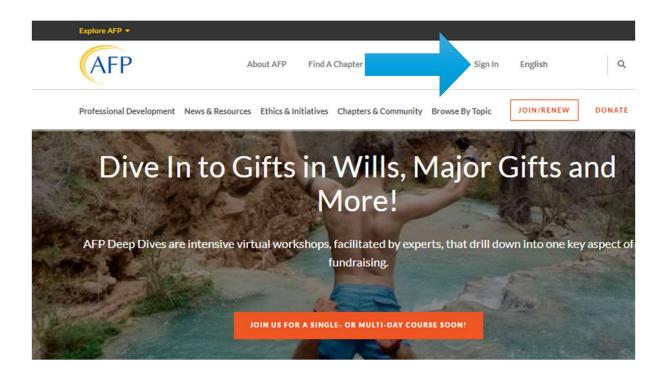
April 2024

WHO CAN ACCESS THE PORTAL

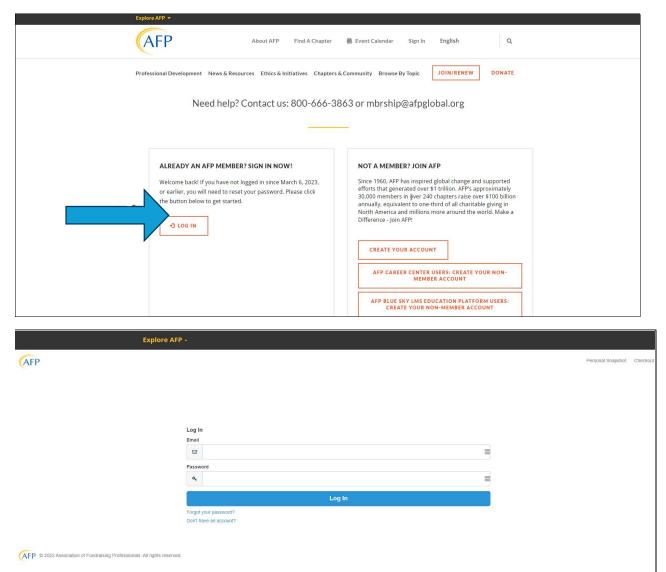
There is no limit to the number of individuals from your chapter board who can access the chapter reports portal, DOMO. By default AFP Global will provide portal access to each **chapter president, membership chair, administrator and foundation development chair**. If you find that there is a different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

HOW TO ACCESS THE PORTAL

Step1: Navigate to <u>www.afpglobal.org</u>



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.

Professional Development News & Resources	5 Ethics & Initiatives Chapters & Community Bi	rowse By Topic JOIN/RENEW DONA
View Connected Accounts Edit		
MEMBER PROFILE	ACCOUNT DETAILS	
My AFP Information	Reset Password	MY BOOKMARKS Bookmarked content will appear
My Name & Profile	Sign Out	here.
My Home and Business Address(es)		
My Email Fax Phone Information and Preference	orders & donations	VIEW ALL
My Communication Preferences	My Shopping Cart	
My Communication Opt-in/Opt-out Preferences	Transaction History	
(Including Advancing Philanthropy delivery)	Manage Your Payment Method	MY INTERESTS
My Committees	Donate to AFP Foundations	
My Demographics	Donation History	CUSTOMIZE
My Affinity Groups		
Member Directory	CHAPTER REPORTS	
Renew My AFP Me	AFP Chapter Membership Reports	
	AFP Chapter Foundation Reports	

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.

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Please select a	i Chapter(s) for di	splaying its memb	oers 🗸	2	24,029	9 。		12,044	•		41	5	Θ	
All Members	Roster (All T	ime by Start D	Date)											
24,029 Memb	oers in Total												_	
🗘 Chapter		AFP Id	🗘 First Nam	ie 🌲 Last	Name 🔷 CFRE	🗘 Designa	tion 🌲 Firs	st Joined 🔷 Start	Date 🌲 End	Date 🌲	Membe	er Type		

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

	Membership Reports					Owner 1 owner	AFP 🔔 37	T Ö
Filter by name	FILTER VIEWS V + M Filter V Chapter in	AFP					🗖 Choose Date 🗸	SAVE FILTERS
verview	Select Chapter		Total Individual Membe		Lapsed Members L	aat 12 Mantha	New Members This	Manth
avorites		~	Total Individual Membe	15	Lapsed Members L	ast 12 WORTHIS	New Members This	Month
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	Clear all selections (1)	Э.		0 9	9	0 9		00
hapter Snapshot	AFP AK, Alaska Chapter							
embership Reports 🛛 🗸	AFP AL, Alabama Chapter							
Point In Time Members	AFP AL, North Chapter	CFRE	Designation First Joined	i 💠 Start Date 🕴	End Date Member Type	🔶 Email	Phone	\$ F
Current Members	AFP AR, Arkansas Chapter	se	MA;BA 04-03-2024	04-01-2024 0	03-31-2025 USD Professional (1yr)		OC 🛙
	AFP AR, Northwest Chapter	se	04-03-2024		03-31-2025 USD Professional (
New Members	AFP AZ, Arizona State Collegiate Chapter	se	03-22-2024		02-28-2025 USD Young Profes			
	AFP AZ, Greater Arizona Chapter	e	03-21-2024		02-28-2025 USD Professional (
Renewed Members		se e	03-21-2024 03-18-2024		02-28-2025 USD Professional (02-28-2025 USD Professional (
apsed Members	AFP AZ, Northern Chapter	* e 5e	03-12-2024		02-28-2025 USD Professional (
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	CANCEL	se	03-06-2024	03-01-2024 0	02-28-2025 USD Professional (1yr)		
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		false	03-06-2024		02-28-2025 USD Professional ((* . · · · · · · · · · · · · · · · · · ·		
		false	03-06-2024	03-01-2024 0	02-28-2025 USD Professional (1yr)		

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.

							Date	SAVE FILTERS
Select Chapter						Date		
AFR					~	Graph b		
					0			
Renewed Members This Month 13 RenewedMembers								
Chapter AFP Id Credentialed Full Name First Name Last	Name 🛔 First Joine	d 🛔 Start Date	🛔 End Date 🛔 Ors	ranization				
AFP N BEEDERSTAR BUSINESS		04-01-2024	03-31-2025 N					
AFP	03-27-2021	04-01-2024	03-31-2025					
AFP I	12-28-2018	04-01-2024	03-31-2025					
AFP I	04-05-2024	04-01-2024	03-31-2025					
AFP I	03-16-2022	04-01-2024	03-31-2025					
AFP I	04-16-1999	04-01-2024	03-31-2025					
AFP /	02-12-1996	04-01-2024	03-31-2025 0					
459 NL Southersey Chapter 1000000121954 Lucioda Marcer, CERE Lucioda	05,15,1997	04-01-2024	03.31.2025					

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

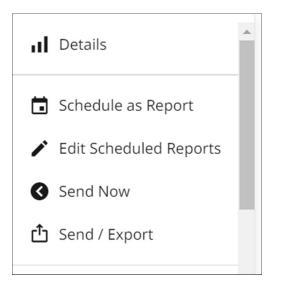
All Time
Current
Today This Week This Month This Quarter This Year
PERIOD TO DATE Week to Date Month to Date Quarter to Date Year to Date

Exporting Report Data:

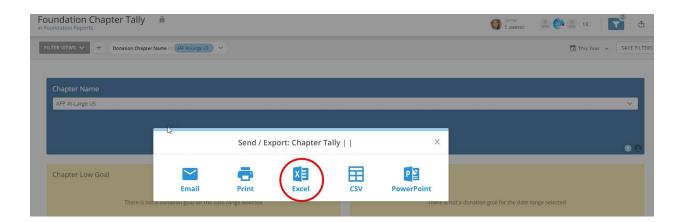
To export the report, **hover over the table and a wrench will appear** in the top right corner. Click on the arrow/wrench and options will appear.

Members Roster	(All Time by Start	Date)							⊻ ⁷¹
,029 Members in Total									
Chapter	🔷 AFP Id	🜲 First Name	🔷 Last Name	🔷 CFRE	Designation	🛊 First Joined	🔷 Start Date	🜲 End Date	🔷 Member Type
Chanter Chanter				false		11-08-2002	03-01-2024	02-28-2025	USD Large Non-Prc
				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-Prc

From the menu select **Send/Export:**



We recommend the Excel option. Your spreadsheet will be in your device download files.



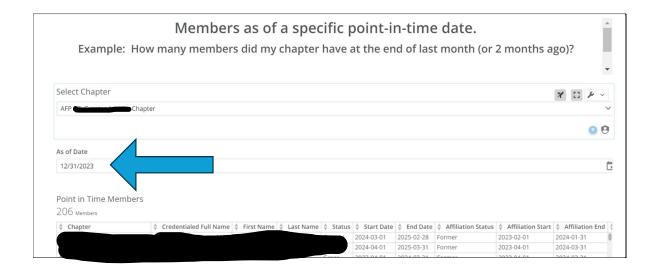
1. CURRENT MEMBER ROSTER REPORT

Select your chapter. The report will default to your current members as of the day that you run the report.

AFP	apter								~
									00
All Members Roster									
216 Members									
🕈 Chapter	Membership Id	🔷 AFP Id	🔷 Full Name	Designation	First Joined	🔶 Start Date	End Date	Member Type	🔷 Pe
Chapter	Membership Id	🜲 AFP Id	🕈 Full Name	Designation	First Joined 2024-03-01	Start Date 2024-03-01	End Date 2025-02-28	Member Type USD Professional (1yr)	
Chapter	🔶 Membership Id	AFP Id	Full Name	Designation					jahrer
🕈 Chapter	Membership Id	♣ AFP Id	Full Name	Designation	2024-03-01	2024-03-01	2025-02-28	USD Professional (1yr)	jahrer hillary
Chapter	Membership Id	AFP Id	Full Name	Designation	2024-03-01 2022-03-22	2024-03-01 2024-04-01	2025-02-28 2025-03-31	USD Professional (1yr) USD Professional (1yr)	Pe jahrer hillary denig torrie
Chapter	🔶 Membership Id	AFP Id	🕈 Full Name	♦ Designation	2024-03-01 2022-03-22 2021-05-01	2024-03-01 2024-04-01 2023-11-01	2025-02-28 2025-03-31 2024-10-31	USD Professional (1yr) USD Professional (1yr) USD Large Non-Profit (1yr)	jahrer hillary denig torrie
Chapter	🗘 Membership Id	♣ AFP id	Full Name	♦ Designation	2024-03-01 2022-03-22 2021-05-01 1997-05-16	2024-03-01 2024-04-01 2023-11-01 2023-10-01	2025-02-28 2025-03-31 2024-10-31 2024-09-30	USD Professional (1yr) USD Professional (1yr) USD Large Non-Profit (1yr) USD Large Non-Profit (1yr)	jahrer hillary denig torrie

2. POINT IN TIME MEMBERS REPORT

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



3. NEW MEMBERS REPORT

Please select a Chapter	r(s) for displaying its m	nembers						~
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ew Members This	simonth							
15 Net New Members								
	🔶 AFP Id	Credentialed Full Name	🔷 First Name 🖨 Las	st Name 🛔 CFRE	First Joined	🕈 Start Date	End Date	# Member Type
	🔷 AFP Id	Credentialed Full Name	First Name Las	st Name 🔶 CFRE	First Joined 04-23-2024	A CONTRACTOR OF A CONTRACTOR O	End Date 03-31-2025	Member Type USD Associate (1yr)
COLOR SOLID MAIL SALE OF THE SAL	🜲 AFP Id	Credentialed Full Name	🔶 First Name 🔶 Las			04-01-2024		
15 Net New Members	💠 AFP Id	Credentialed Full Name	First Name Las	false	04-23-2024	04-01-2024 04-01-2024	03-31-2025	USD Associate (1yr)

4. RENEWED MEMBERS REPORT

Select Chapter										
AFP										~
										00
_										
Renewed Mem	bers This Mon	th								
Renewed Mem 3 _{RenewedMembers}	bers This Mon	th								
	bers This Mon	th	🔶 First Name 🖣	Last Name	♦ CFRE	First Joined	🔷 Start Date	End Date	🕈 Member Type	🕈 Emai
3 RenewedMembers			First Name		♦ CFRE false	First Joined 04-15-2024	Start Date 04-01-2024	End Date 03-31-2025		

5. LAPSED MEMBERS REPORT

AFP											~
										(0 6
	er Report Last 12	Months									
56 Members Lapsed		Months	ll Name 🍦	First Name	Last Name	♦ CFRE	First Joined	Start Date	End Date	Member Type	\$
Lapsed Member 56 Members Lapsed Chapter			ll Name 븆	First Name	🕈 Last Name		First Joined 03-05-2017	Start Date 05-01-2022	End Date 05-31-2023	Member Type USD Small Non-Profit (1yr)	¢

FOUNDATION REPORTS

1. CHAPTER TALLY REPORT

Select your **chapter name** as before.

Foundation Chapter Tally in Foundation Reports	8				🎯 ^{Owner} 🔹 🤇	18
FILTER VIEWS 🗸 🕂		Add filters to your Dashboard to fi	nd new insights.			🖬 Choose Date 👻 SA
Chapter Name						
Select						
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	\$250			⇒∠ŏ	,507	
	1 - 0 0	θ		1	,	
Chapter Tally All Time						
▲ ◆ AFP ID ▲	Donor Name 🔷 Order Iter	n Transaction Date 🛛 🔶 Donations	🕈 Pledges 🗳	Total Pledge & Donation Amount	Total Payment Received	d 🝦 Balance 💠 Alpha Fla
 Donation Details 	2023-03-20	\$511.00	\$0.00	\$511.00	\$511.0	
	2024-01-30	\$100.00	\$0.00	\$100.00	\$100.0	
	2023-12-26	\$485.74	\$0.00	\$485.74	\$485.7	
	2023-12-20	\$1,769.40	\$0.00	\$1,769.40	\$1,769.4	
	2023-12-20	\$240.00	\$0.00	\$240.00	\$240.0	\$0.00 Non-Alpha

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

Foundation Chapter Tally) owner Sector 1 owner	🏟 🖲 (B) 🔽 🖹 🖕 🛩
FILTER VIEWS V + Donation Chapter Name in APP Actarge US V		Choose Date 🐱 SAVE FILTERS
Chapter Name		Date range
AFP At-Large US		Default Use each Card's own date range
		All Time Current
		Today
		This Week This Month
Chapter Low Goal	Chapter High Goal	This Quarter
There is not a donation goal for the date range selected	There is not a donation goal for the date range se	This Year

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.

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ilter views 🗸 🕂	Donation Chapter N	lame in AFP At-Large US	×						📑 This Year	∽ SAVE F
AFP At-Large US										~
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	đ	1 00	\mathbf{D}			¢E	$\cap \cap$			
	Þ	51,00	50	00		\$5	00			<u> </u>
Chapter Tally AFP	At-Large US ⁻	This Year								
A	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 03					20.00	0.00	
			2024-03-28	\$5.00	\$0.00	\$5.00		\$5.00	\$0.00	Non-Alpha
				\$5.00 \$0.00	\$0.00 \$200.00	\$5.00 \$200.00		\$5.00	\$150.00	
Donation Details TOTA	L _c		2024-03-28							Alpha

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.

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+						Add filter	s to your Dash	hboard <mark>t</mark> o fi	nd new insi	ghts.					Cr	hoose Dat
,	Chapter N	lame														
	Select															~
	Donation: Donor Name	s with Mai ⊅onor ∳ Title	↓ CFRE	15	Order Item Transactio n Date 2023-07-03	Produc t Name	Billing Street	Billing City	Billing Zip/Posta I Code	у	Phone	Donor Email	¢	Alpha Flag	Billing State/Province	
			true	laise		2023 BE the CAUSE Gift				United States			A I	pha	CA	F III
			false	false	2023-07-03	the CAUSE Gift 2023 BE the CAUSE Pledge				States United States	-		A	pha on- pha	CA NC	
					2023-07-03	the CAUSE Gift 2023 BE the CAUSE				States United	-		Al Ni Al	pha on- pha on- pha	CA	F S

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.

Chapter Name Select Q. Search below values	FILTER VIEWS 🗸 🕇		Add filters to your Dashboard to find new insights.	🖬 Choose Date 🗸 SA
Q. Search below values		Chapter Name		
		Select		~
		Q. Search below values		
		AFP AK, Alaska Chapter		Â.,

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

Donor Contact Ir	forma	tion										۹	Owner 1 owner		🌺 😩 (18) 📗	*
FILTER VIEWS 🗸 🕇	Donation (Chapter Nar	ne in AFP	At-Large US	`										🖬 Choose Date 🗸	SAVE FILTERS
	Chapter	Name													Date range Default 💙	
	AFP At-L														Default Use each Card's	own date range
															All Time	
															Current	
	Donatio	ons with	Mailing	Info											Today	
	Donor			ACFRE		Product	Billing	Billing	Billing	Billing	Phone	Donor Email	Alpha	Bil	1 This Week	
		⊕ Title	÷	Ŧ	Transaction Date	Name	Street		Code	Country	Ŧ	Ŷ	₽ Fi	\$ Sta	This Month	
		Executive Director	true	false	2023-07-09	Alpha Society			1	United States		1	Alpha	1	This Quarter	
						Recurring Monthly Gift									This Year	իպ
			false	false	2023-07-20	Alpha			1	United			Alpha	VA	PERIOD TO DATE	0