

ASSOCIATION OF FUNDRAISING PROFESSIONALS

Chapter Reports Portal Guidelines

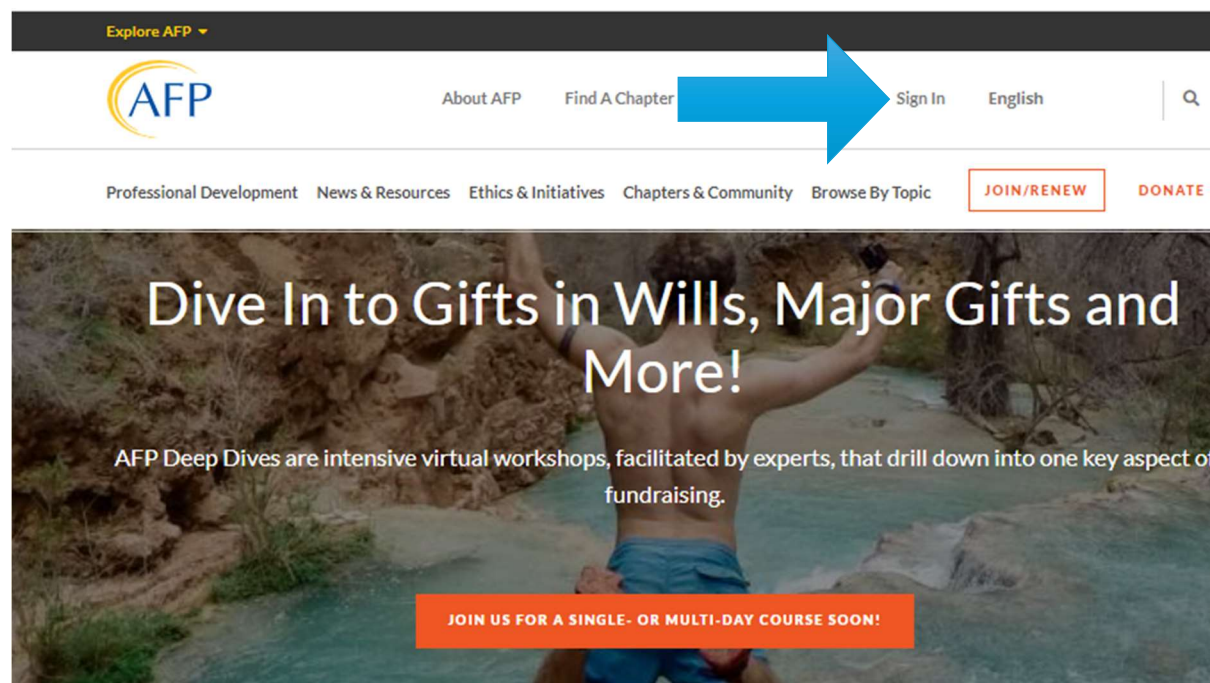
June 2024

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

Step 1: Navigate to www.afpglobal.org



Step 2: Log in to your individual account

Explore AFP

AFP

About AFP Find A Chapter Event Calendar Sign In English

Professional Development News & Resources Ethics & Initiatives Chapters & Community Browse By Topic [JOIN/RENEW](#) [DONATE](#)

Need help? Contact us: 800-666-3863 or mbrship@afpglobal.org

ALREADY AN AFP MEMBER? SIGN IN NOW!

Welcome back! If you have not logged in since March 6, 2023, or earlier, you will need to reset your password. Please click the button below to get started.

[LOG IN](#)

NOT A MEMBER? JOIN AFP

Since 1960, AFP has inspired global change and supported efforts that generated over \$1 trillion. AFP's approximately 30,000 members in over 240 chapters raise over \$100 billion annually, equivalent to one-third of all charitable giving in North America and millions more around the world. Make a Difference - Join AFP!

[CREATE YOUR ACCOUNT](#)

[AFP CAREER CENTER USERS: CREATE YOUR NON-MEMBER ACCOUNT](#)

[AFP BLUE SKY LMS EDUCATION PLATFORM USERS: CREATE YOUR NON-MEMBER ACCOUNT](#)

Explore AFP

AFP

Personal Snapshot Checkout

Log In

Email

Password

[Log In](#)

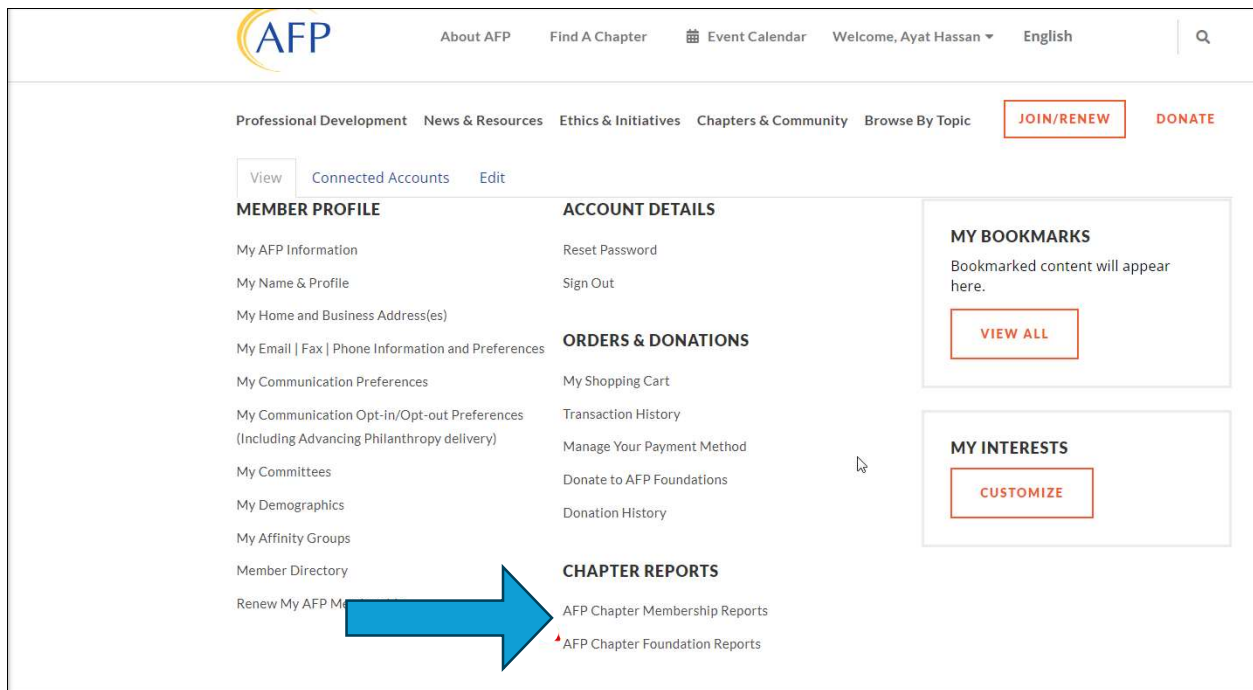
[Forgot your password?](#)

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

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

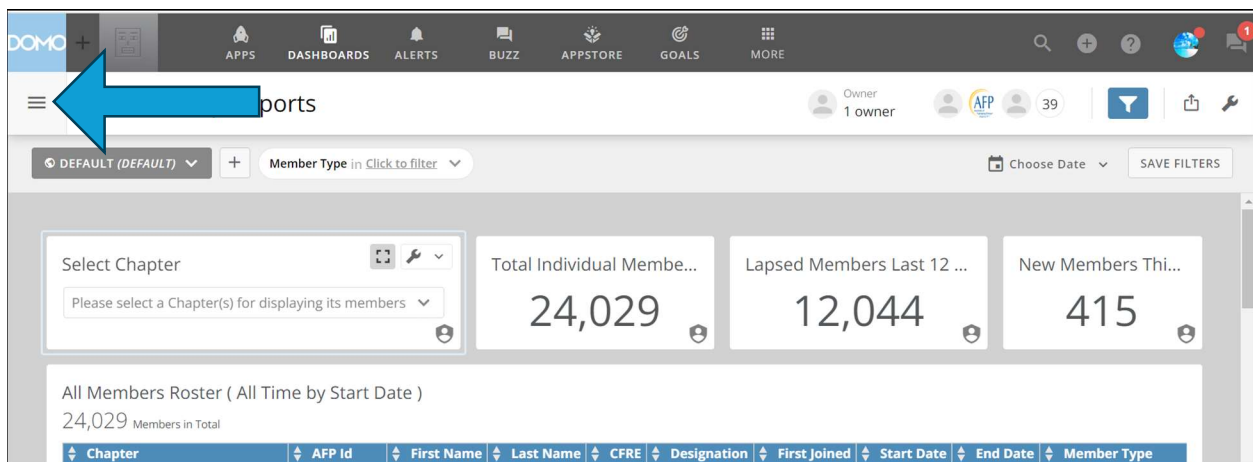
Both of these links will take you to the new chapter reports portal, Domo.



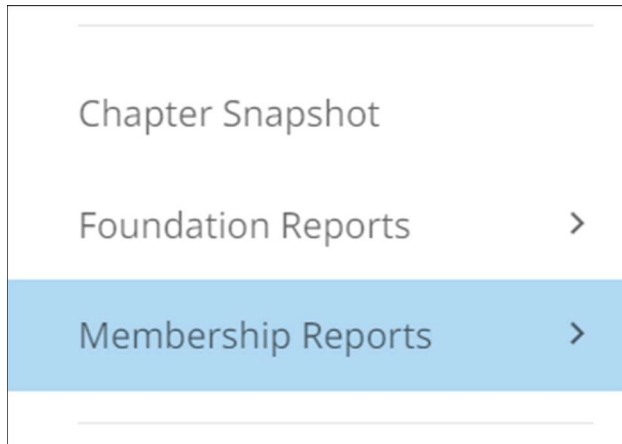
HOW TO FIND WHAT YOU NEED IN DOMO

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'.

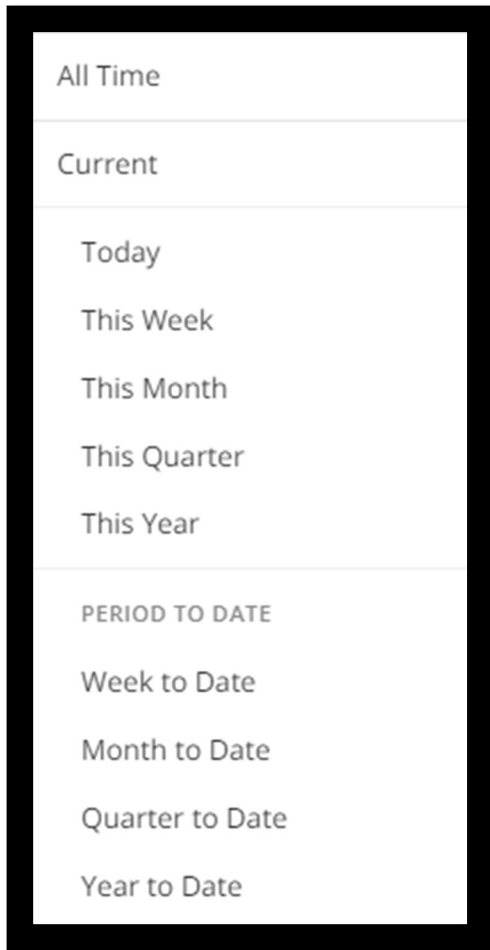
Choose your chapter. When you navigate to a different page or select a new report you will need to select your chapter. In most cases you will only see a single chapter to select in the dropdown. For those of you administrating multiple chapters, you will see a short list to choose from.

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

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



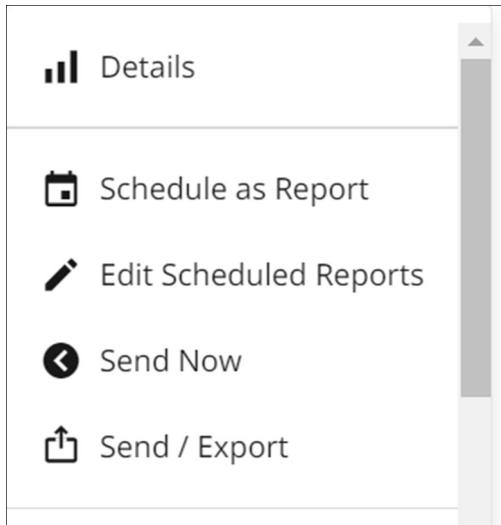
Exporting Report Data:

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.

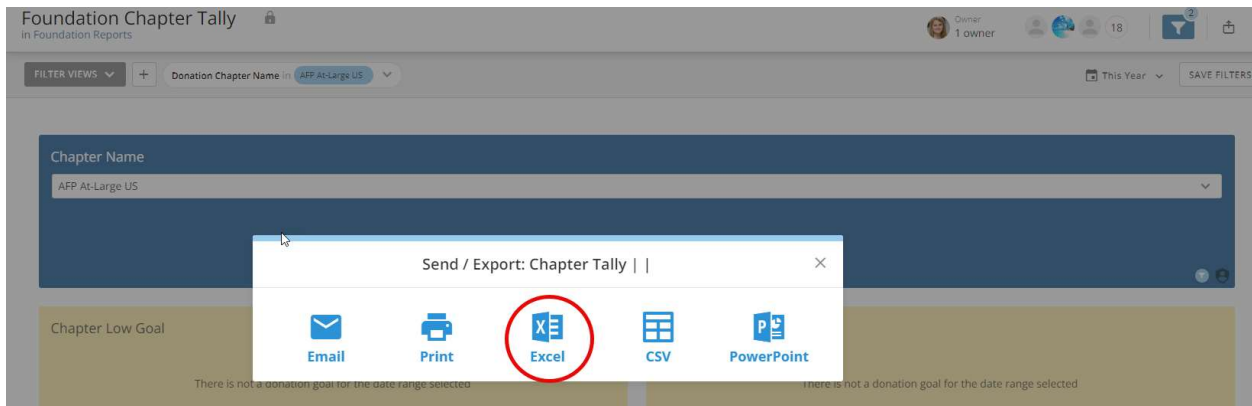
All Members Roster (All Time by Start Date)
24,029 Members in Total

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-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:**

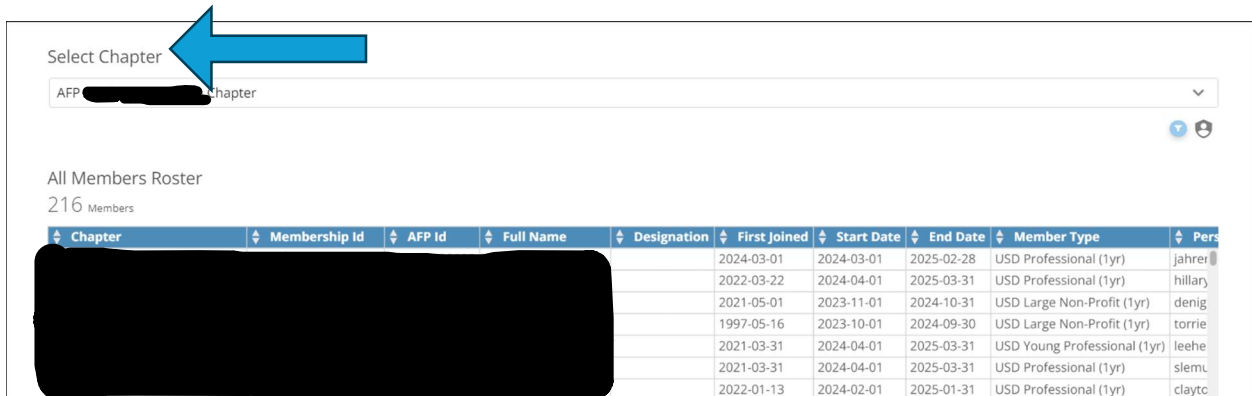


We recommend the Excel option. Your spreadsheet will be in your device download files.



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.



2. POINT IN TIME MEMBERS REPORT

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

Members as of a specific point-in-time date.

Example: How many members did my chapter have at the end of last month (or 2 months ago)?

Select Chapter
AFP [REDACTED] Chapter

As of Date
12/31/2023

Point in Time Members
206 Members

Chapter	Credentialed Full Name	First Name	Last Name	Status	Start Date	End Date	Affiliation Status	Affiliation Start	Affiliation End
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2024-03-01	2025-02-28	Former	2023-02-01	2024-01-31
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2024-04-01	2025-03-31	Former	2023-04-01	2024-03-31

3. NEW MEMBERS REPORT

Select Chapter
Please select a Chapter(s) for displaying its members

New Members This Month
415 Net New Members

Chapter	AFP Id	Credentialed Full Name	First Name	Last Name	CFRE	First Joined	Start Date	End Date	Member Type
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-23-2024	04-01-2024	03-31-2025	USD Associate (1yr)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-23-2024	04-01-2024	03-31-2025	USD Professional (1yr)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-04-2024	04-01-2024	03-31-2025	USD Professional (1yr)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-01-2024	04-01-2024	03-31-2025	USD Large Non-Profit

4. RENEWED MEMBERS REPORT

Select Chapter
AFP [REDACTED]

Renewed Members This Month
3 RenewedMembers

Chapter	AFP Id	Credentialed Full Name	First Name	Last Name	CFRE	First Joined	Start Date	End Date	Member Type	Email
AFP [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-15-2024	04-01-2024	03-31-2025	USD Professional (1yr)	shannonw
AFP [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	04-08-2024	04-01-2024	03-31-2025	USD Professional (1yr)	jdinneen@

5. LAPSED MEMBERS REPORT

Select Chapter

AFP [REDACTED]

Lapsed Member Report Last 12 Months

56 Members Lapsed

Chapter	AFP ID	Credentialed Full Name	First Name	Last Name	CFRE	First Joined	Start Date	End Date	Member Type	E
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	03-05-2017	05-01-2022	05-31-2023	USD Small Non-Profit (1yr)	de
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	false	11-18-2022	11-01-2022	11-30-2023	USD Professional (1yr)	ma

6. CHAPTER DUES REIMBURSEMENT REPORT

- Select reimbursement report
- Choose date range
- Report will populate below for your Chapter

Dashboards

Reimbursement Report

Membership Reports

Point In Time Members

Renewed Members

Reimbursement Report

Internal AFP

Membership Report

Member Directory

MANAGE DASHBOARDS

ps://afpglobal-org.domo.com/page/832831025

Reimbursement Report | Previous Month

Date	Order Item Line: Product: Related Chapter: Account Name	Debit/Credit Amount	Customer: Account Name	Customer: Membership: Start Date	Customer: Memb
GRAND TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

FOUNDATION REPORTS

1. CHAPTER TALLY REPORT

Select your chapter name as before.

Foundation Chapter Tally

Chapter Name

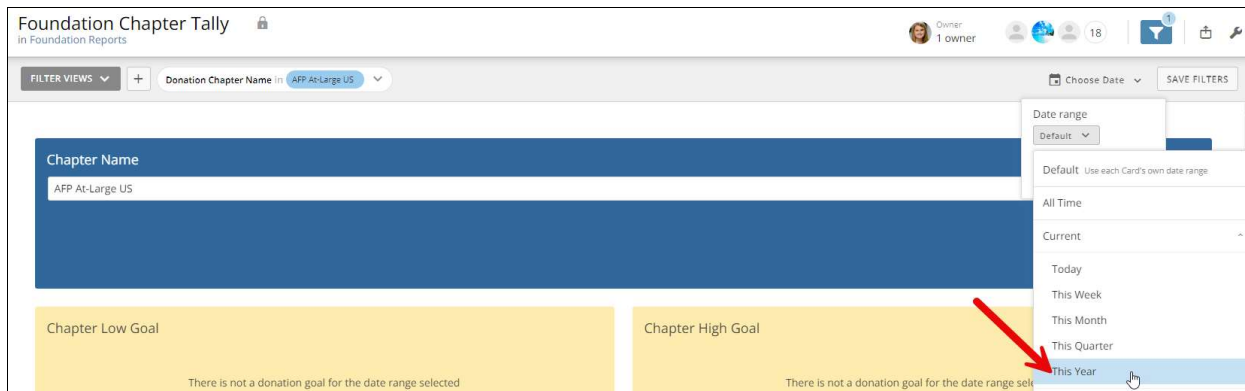
Chapter Low Goal

Chapter High Goal

Chapter Tally | All Time

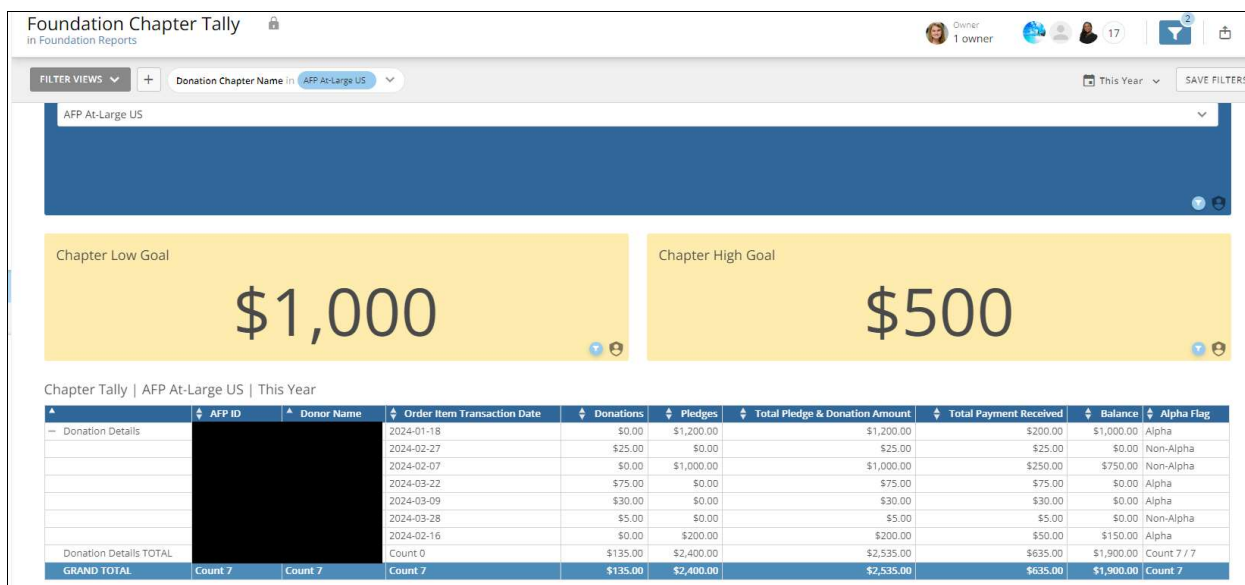
AFP ID	Donor Name	Order Item Transaction Date	Donations	Pledges	Total Pledge & Donation Amount	Total Payment Received	Balance	Alpha Flag
[REDACTED]	[REDACTED]	2023-03-20	\$511.00	\$0.00	\$511.00	\$511.00	\$0.00	Non-Alpha
[REDACTED]	[REDACTED]	2024-01-30	\$100.00	\$0.00	\$100.00	\$100.00	\$0.00	Non-Alpha
[REDACTED]	[REDACTED]	2023-12-26	\$485.74	\$0.00	\$485.74	\$485.74	\$0.00	Non-Alpha
[REDACTED]	[REDACTED]	2023-12-20	\$1,769.40	\$0.00	\$1,769.40	\$1,769.40	\$0.00	Non-Alpha
[REDACTED]	[REDACTED]	2023-12-20	\$240.00	\$0.00	\$240.00	\$240.00	\$0.00	Non-Alpha

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.

Donor Contact Information
In Foundation Reports

Owner 1 owner

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	LFRE	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

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.

Donor Contact Information
In Foundation Reports

Owner 1 owner

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

Chapter Name
Select

Search below values...

Only all selections (0)

AFP AK, Alaska Chapter

AFP AL, Alabama Chapter

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

Donor Contact Information
In Foundation Reports

Owner 1 owner

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 Flag	Billing State/Province
	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 Use each Card's own date range

All Time

Current

Today

This Week

This Month

This Quarter

This Year

PERIOD TO DATE

