ASSOCIATION OF FUNDRAISING PROFESSIONALS Chapter Reports Portal Guidelines

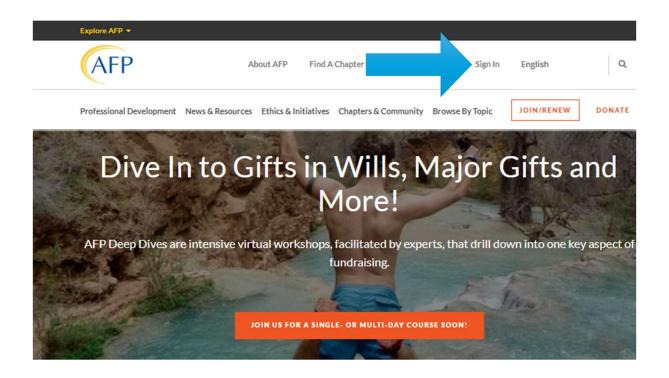
June 2024

WHO CAN ACCESS THE PORTAL

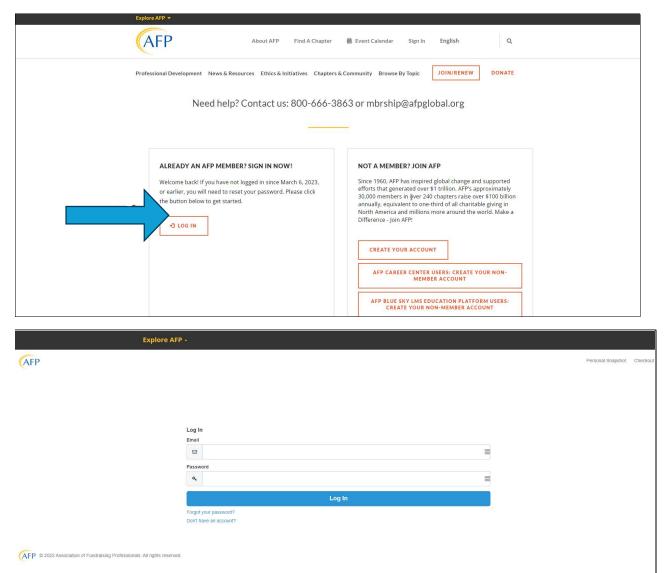
There is no limit to the number of individuals from your chapter board who can access the chapter reports portal, DOMO. By default AFP Global will provide portal access to each **chapter president, membership chair, administrator and foundation development chair**. If you find that there is a different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

AFP About AFP	Find A Chapter	ne, Ayat Hassan 🔻 English 🛛 🤇
Professional Development News & Resources	Ethics & Initiatives Chapters & Community Bro	owse By Topic JOIN/RENEW DONAT
MEMBER PROFILE	ACCOUNT DETAILS	
My AFP Information	Reset Password	MY BOOKMARKS
My Name & Profile	Sign Out	Bookmarked content will appear here.
My Home and Business Address(es)		
My Email Fax Phone Information and Preferences	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	CUSTOMIŻE
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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All Members	Roster (All T	ime by Start D)ate)											
24,029 Membe	ers in Total													
🔶 Chapter		🔷 AFP Id	🗘 First Nam	ne 🔶 Last	Name 🖨 CFRE	븆 Designa	tion 🌲 Firs	t 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 🖞
Filter by name	FILTER VIEWS V + M	AFP					🖬 Choose Date 🗸	SAVE FILTERS
Verview	Select Chapter		Total Individual Membe		Lapsed Members Las	rt 12 Months	New Members This I	Month
avorites		~	Total Individual Membe	:15	Lapsed Members La	St 12 WORTHS	New Wenders This	violititi
hared		II	29-	2	15	5	1	
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hapter Snapshot	AFP AK, Alaska Chapter							
embership Reports 🗸 🗸								
	AFP AL, Alabama Chapter							
Point In Time Members	AFP AL, North Chapter	CERE	🗘 Designation 🖌 First Joined	Start Date	A End Date A Member Type	¢ Email	🔶 Phone	¢ F
Current Members	AFP AR, Arkansas Chapter	se	MA;BA 04-03-2024	1.00	03-31-2025 USD Professional (1vi			OC II
current wembers	AFP AR, Northwest Chapter	se	04-03-2024	04-01-2024	03-31-2025 USD Professional (1yr	7)		
New Members	AFP AZ, Arizona State Collegiate Chapter	se	03-22-2024	03-01-2024	02-28-2025 USD Young Professio	nal (1yr)		
		e	03-21-2024		02-28-2025 USD Professional (1yr	2 S S S S S S S S S S S S S S S S S S S		
Renewed Members	AFP AZ, Greater Arizona Chapter	se	03-21-2024		02-28-2025 USD Professional (1yr	*		
Lapsed Members	AFP AZ, Northern Chapter	✓ e se	03-18-2024 03-12-2024		02-28-2025 USD Professional (1y) 02-28-2025 USD Professional (1y)			
capaed memoera			03-06-2024		02-28-2025 USD Professional (1) 02-28-2025 USD Professional (1)			-
	CANCEL	APPLY SE	03-06-2024		02-28-2025 USD Professional (1)			
		false	03-06-2024	03-01-2024	02-28-2025 USD Professional (1yr			
		false	03-06-2024	03-01-2024	02-28-2025 USD Professional (1yr	0		
		false	03-06-2024	03-01-2024	02-28-2025 USD Professional (1yr)		
		false	03-06-2024		02-28-2025 USD Professional (1yr			
		false	03-06-2024	03-01-2024	02-28-2025 USD Professional (1yr	r)		

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					Data
AFR				~	Graph by Default
				9 9	
Renewed Members This Month 13 RenewedMembers					
Chapter AFP Id Credentialed Full Name First Name t	A Cast Manage	A Grant Data A s			
	enberg 03-13-2017		11-2025 N		
AFP	03-27-2021		1-2025		
AFP I	12-28-2018	04-01-2024 03-3	1-2025		
AFP I	04-05-2024	04-01-2024 03-3	1-2025		
AFP I	03-16-2022	04-01-2024 03-3	1-2025		
AFP (04-16-1999	04-01-2024 03-3	1-2025		
AFP 1	02-12-1996	04-01-2024 03-3	1-2025 D		
459 NL Southersey Chapter, 000000131954, Lucioda, Marcer, CERE, Lucioda	fer 05,15,1992	04-01-2024 03-3	1.2025		

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

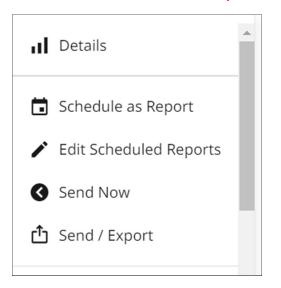
All Time
Current
Today This Week This Month This Quarter This Year
PERIOD TO DATE Week to Date Month to Date Quarter to Date Year to Date

Exporting Report Data:

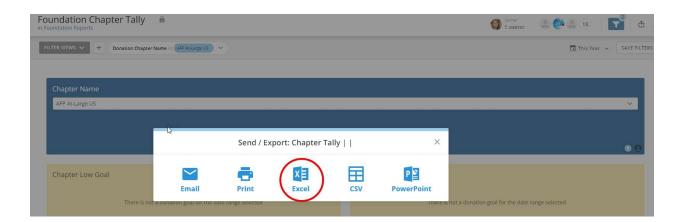
To export the report, **hover over the table and a wrench will appear** in the top right corner. Click on the arrow/wrench and options will appear.

Members Roster	(All Time by Start	Date)							₽ ⁷
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.



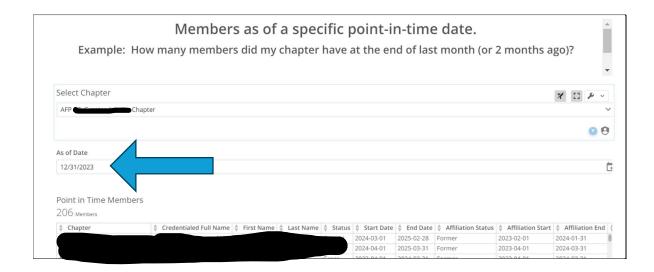
1. CURRENT MEMBER ROSTER REPORT

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

Select Chapter									
AFP	hapter								~
									00
	🔷 Membership Id	🔷 AFP Id	🔷 Full Name	Designation	🔶 First Joined	🕈 Start Date	End Date	Member Type	🔶 Pe
	Membership Id	AFP Id	🕈 Full Name	Designation	First Joined 2024-03-01			Member Type USD Professional (1yr)	
	🔶 Membership Id	AFP Id	Full Name	♦ Designation		2024-03-01	2025-02-28		jahrer
	🔶 Membership Id	AFP Id	🐥 Full Name	+ Designation	2024-03-01	2024-03-01 2024-04-01	2025-02-28 2025-03-31	USD Professional (1yr)	jahrer hillary
	+ Membership Id	💠 AFP Id	🕈 Full Name	♦ Designation	2024-03-01 2022-03-22	2024-03-01 2024-04-01 2023-11-01	2025-02-28 2025-03-31 2024-10-31	USD Professional (1yr) USD Professional (1yr)	jahrer hillary denig
	🔶 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 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)	 Pe jahrer hillary denig torrie leehe
216 Members ∲ 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 2024-04-01	2025-02-28 2025-03-31 2024-10-31 2024-09-30 2025-03-31	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

Select Chapter								
Please select a Chapter	(s) for displaying its m	iembers						~
								0
ew Members This	Month							
15 Net New Members								
Chapter	🜲 AFP Id	Credentialed Full Name	🛊 First Name 🖨 Last Name	♦ CFRE	First Joined	🕈 Start Date	End Date	Member Type
			Wellion	false	04-23-2024	04-01-2024	03-31-2025	1100 A
				laise	04-20-2024	04-01-2024	03-31-2025	USD Associate (1yr)
				false			03-31-2025	USD Associate (1yr) USD Professional (1yr)
					04-23-2024	04-01-2024		

4. RENEWED MEMBERS REPORT

Select Chapter										
AFP										~
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_										
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



6. CHAPTER DUES REIMBURSMENT REPORT

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

Dashboards 🛛 🖡	Reimbursement Report	•	🗿 ^{Owner} 1 owner	2 🛞 10	▼ ₫
Q Filter by name	S DEFAULT (DEFAULT) V +	Add filters to your Dashboard to find new insights.		🖬 Choose Date 🗸	SAVE FILT
Membership Reports 🗸 🗸	-				
Point In Time Members	Select Chapter				
Renewed Members	Please select a Chapter for displaying its members				
Reimbursement Report					
Internal AFP >	Reimbursement Report Previous Month	ter: Account Name 🍦 Debit/Credit Amount 🍦 Customer: Accour	nt Name 🖕 Customer:	: Membership: Start Date	
Member Directory	GRAND TOTAL				
MANAGE DASHBOARDS					
ns://afpolobal-org.domo.com/page/832	20	-3			

FOUNDATION REPORTS

1. CHAPTER TALLY REPORT

Select your **chapter name** as before.

Foundation Chapter Tally	â			Owner 1 owner	2 🍄 2	18 7 📩
FILTER VIEWS 🗸 🕂		Add filters to your Dashboard to fin	d new insights.		🖬 Cho	ose Date 🐱 SAVE FILTER
Chapter Name						
Select						~
Chapter Low Goal			Chapter High Goal			× 4 ×
	¢ 7 5 0			¢ 20 E (דר	
	\$250	9		\$28,50)/	0
Chapter Tally All Time						
A AFP ID	• Donor Name 🔷 Order Iten	Transaction Date 🗧 🕈 Donations	💠 Pledges 🕴 🕈 Total P	edge & Donation Amount 🛛 💠 Total Paymi	ent Received 🔷 🗘 B	alance 💠 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 2023-12-20	\$485.74 \$1,769.40	\$0.00	\$485.74 \$1,769.40	\$485.74 \$1,769.40	\$0.00 Non-Alpha \$0.00 Non-Alpha
	2023-12-20 2023-12-20	\$1,769.40	\$0.00	\$1,769.40	\$1,769.40 \$240.00	\$0.00 Non-Alpha

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

Foundation Chapter Tally	Ovmer 1 owner	襘 🛎 18 🛛 🔽 📩 🖌
FILTER VIEWS V + Donation Chapter Name in (AFP AcLarge US) V		Choose Date 🤝 SAVE FILTERS
Chapter Name		Date range Default Default Default Use each Card's own date range
AFP At-Large US		All Time
		Current ^ Today
		This Week This Month
Chapter Low Goal	Chapter High Goal	This Month
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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	t-Large US T	his Year			Pledges \$1,200.00			Received \$200.00	Balance \$1,000.00	🗘 Alpha Flag
•	t-Large US T	his Year	• Order Item Transaction Date	Donations		Total Pledge & Donation Amount			\$1,000.00	🗘 Alpha Flag
•	t-Large US T	his Year	Order Item Transaction Date 2024-01-18	Donations \$0.00	\$1,200.00	Total Pledge & Donation Amount \$1,200.00		\$200.00	\$1,000.00 \$0.00	Alpha Flag Alpha
•	t-Large US T	his Year	Order Item Transaction Date 2024-01-18 2024-02-27	Donations \$0.00 \$25.00	\$1,200.00 \$0.00	Total Piedge & Donation Amount \$1,200.00 \$25.00		\$200.00 \$25.00	\$1,000.00 \$0.00 \$750.00	Alpha Flag Alpha Non-Alpha
•	t-Large US T	his Year		Donations \$0.00 \$25.00 \$0.00	\$1,200.00 \$0.00 \$1,000.00	Total Pledge & Donation Amount \$1,200.00 \$25.00 \$1,000.00		\$200.00 \$25.00 \$250.00	\$1,000.00 \$0.00 \$750.00 \$0.00	Alpha Flag Alpha Non-Alpha Non-Alpha
•	t-Large US T	his Year	Order Item Transaction Date 2024-01-18 2024-02-27 2024-02-07 2024-03-22	♦ Donations \$0.00 \$25.00 \$0.00 \$75.00	\$1,200.00 \$0.00 \$1,000.00 \$0.00	Total Pledge & Donation Amount \$1,200.00 \$25.00 \$1,000.00 \$7,000		\$200.00 \$25.00 \$250.00 \$75.00	\$1,000.00 \$0.00 \$750.00 \$0.00 \$0.00	Alpha Flag Alpha Non-Alpha Non-Alpha Alpha
•	t-Large US T	his Year	Order Item Transaction Date 2024-01-18 2024-02-27 2024-02-27 2024-03-22 2024-03-22 2024-03-09	♦ Donations \$0.00 \$25.00 \$0.00 \$75.00 \$30.00	\$1,200.00 \$0.00 \$1,000.00 \$0.00 \$0.00	Total Pledge & Donation Amount \$1,200.00 \$25.00 \$1,000.00 \$75.00 \$75.00 \$30.00 \$30.00		\$200.00 \$25.00 \$250.00 \$75.00 \$30.00	\$1,000.00 \$0.00 \$750.00 \$0.00 \$0.00	Alpha Flag Alpha Non-Alpha Non-Alpha Alpha Alpha Non-Alpha
•	t-Large US T	his Year	♦ Order Item Transaction Date 2024-01-18 2024-02-27 2024-02-07 2024-03-22 2024-03-22 2024-03-28	♦ Donations \$0.00 \$25.00 \$0.00 \$75.00 \$30.00 \$5.00	\$1,200.00 \$0.00 \$1,000.00 \$0.00 \$0.00 \$0.00	Total Pledge & Donation Amount \$1,200.00 \$25.00 \$1,000.00 \$75.00 \$30.00 \$30.00 \$30.00		\$200.00 \$25.00 \$250.00 \$75.00 \$30.00 \$5.00	\$1,000.00 \$0.00 \$750.00 \$0.00 \$0.00 \$0.00 \$150.00	Alpha Non-Alpha Non-Alpha Alpha Alpha Non-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.

+						Add filter	's to your D	ashboard to	find new insi	ghts.				🗂 Ch	oose Date
	Chapter	Name													
	Select													,	~
		11													
	Donatio	ns with Ma	LIING INTO	15				1		Billing	Phone	Donor Email	Alpha	en 🎤 🦻 ·	~
				ACERE	Order Item	Produc	Billing	Billing	Billing						
	Name		\$	\$	Transactio n Date		Street	¢ City	Zip/Posta I Code	¢ Countr y			Flag	State/Province	\$
				\$ false	Transactio n Date 2023-07-03		\$ Street	¢ City	Zip/Posta	Countr			d Non- Alpha	State/Provinc	₽ F S
			\$	÷	Transactio n Date 2023-07-03	 t Name 2023 BE the CAUSE Gift 2023 BE 	\$ Street	¢ City	Zip/Posta	Country y United States United			Flag	State/Provinc e	
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			∲ true	\$ false	Transactio n Date 2023-07-03	 t Name 2023 BE the CAUSE Gift 2023 BE the CAUSE 	\$ Street	¢ City	Zip/Posta	Country y United States United			Flag	State/Provinc e CA	

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		
	Select	
Q. Search below values		~
	Q Search below values	

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										0	Owner 1 owner		🚔 🚨 18 🛛 🔽 📩 🖊
FILTER VIEWS 🗸 🕂	Donation C	hapter Nam	e in AFP.	At-Large US	•										Choose Date 🗸 SAVE FILTERS
	Chapter AFP At-La														Date range Default V Default Use each Card's own date range All Time
	Donatio	ns with I	Mailing	Info											Current ^
	Donor T Name	Donor † Title	¢ CFRE	ACFRE	Order Item Transaction Date	Product T Name	Billing	Billing ∉ City	Billing Zip/Postal Code	Billing ⊕ Country	Phone 🚖	Donor Email	Alpha \$ Fi	⊜ Bil \$ Sta	a This Week This Month
		Executive Director	true	false	2023-07-09	Alpha Society Recurring Monthly Gift				United States			Alpha		This Quarter This Year
			false	false	2023-07-20	Alpha			1	United			Alpha	VA	PERIOD TO DATE