Chapter Portal(DOMO) Training
April 2024
Agenda

• New Chapter Reports Portal!
• Who Can Access The Portal?
• How To Access The Portal
• How To Navigate The Portal
• Membership Reports
• Foundation Reports
Who Can Access The Portal?

• NOT limited to one person!
• Default Access:
  • Chapter President
  • Chapter Membership Chair
  • Chapter Administrator
  • Chapter Foundation Development Chair
• Don’t have access? Maybe AFP Global doesn’t have record of your chapter board position. Just send us an email.
• Membership Reports and Foundation Reports are visible.
• To Request Access – contact chapter.engagement@afpglobal.org
How To Access The Portal

• www.afpglobal.org
• Sign in to your individual account.
How To Access The Portal

- Click ‘My Account’ under your name
- Click either link under ‘Chapter Reports’
How To Navigate The Portal

- If the menu does not appear at left, click on the menu ‘hamburger’ icon. You can pin the full menu so it does not collapse.
- Header Icons – some of these come with the platform and you can ignore. For instance, the profile bubbles up top. Don’t worry, these individuals simply have platform access. They don’t have access to your chapter member data.

<table>
<thead>
<tr>
<th>Membership Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Chapter</td>
</tr>
<tr>
<td>Please select a Chapter(s) for displaying its members</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

All Members Roster (All Time by Start Date)

<table>
<thead>
<tr>
<th>Chapter</th>
<th>AFP Id</th>
<th>First Name</th>
<th>Last Name</th>
<th>CFRE</th>
<th>Designation</th>
<th>First Joined</th>
<th>Start Date</th>
<th>End Date</th>
<th>Member Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter1</td>
<td>123456</td>
<td>John Doe</td>
<td>Jane Doe</td>
<td>Yes</td>
<td>Member</td>
<td>2020-01-01</td>
<td>2020-07-01</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How To Navigate The Portal

• **Chapter Snapshot**: Overall summary data for the chapter. We are working to add trends over time and comparisons to AFP Global.

• **Foundation Reports**: Current available reports for foundation data.

• **Membership Reports**: Current available reports for member data.
Membership Reports

• First select your chapter name
• All available reports will appear on the landing page
• Report title indicates the default time period
Membership Reports

• Click on individual reports in the menu to access time period filters
• The Member Roster as of a point in time is only available in this menu
Membership Reports – Available Reports

- Reports that you can choose individually
- Additional reports to come are a Reimbursement Report for chapter dues & a Retention Report.
- Point In Time Member is a roster that you can select as of a date in the past.
- Past Data only reliable back to October 2023.
Membership Reports – Date Filters

- ‘Point In Time Members’ Report requires you to pick a past date in order to see your full member roster as of that date.
Membership Reports – Date Filters

- Filters available under ‘date range’
Membership Reports – Date Filters

- Filters available under ‘date range’
- Apply to New Members, Lapsed or Renewed Members reports
Membership Reports - Exporting

- Hover over your report. A wrench icon will appear in the corner.
- Click ‘Send/Export’ from the menu.
- We recommend selecting ‘Excel’ as your download option.
- The document will appear in your device download file.
Choose the date range of ‘this year’ to see the most recent donor giving information.
Foundation Reports – Donor Contact Information Report

• Choose the date range of ‘this year’ to see the most recent donor contact information.