



Chapter Portal(DOMO) Training

April 2024

Association of Fundraising Professionals

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?

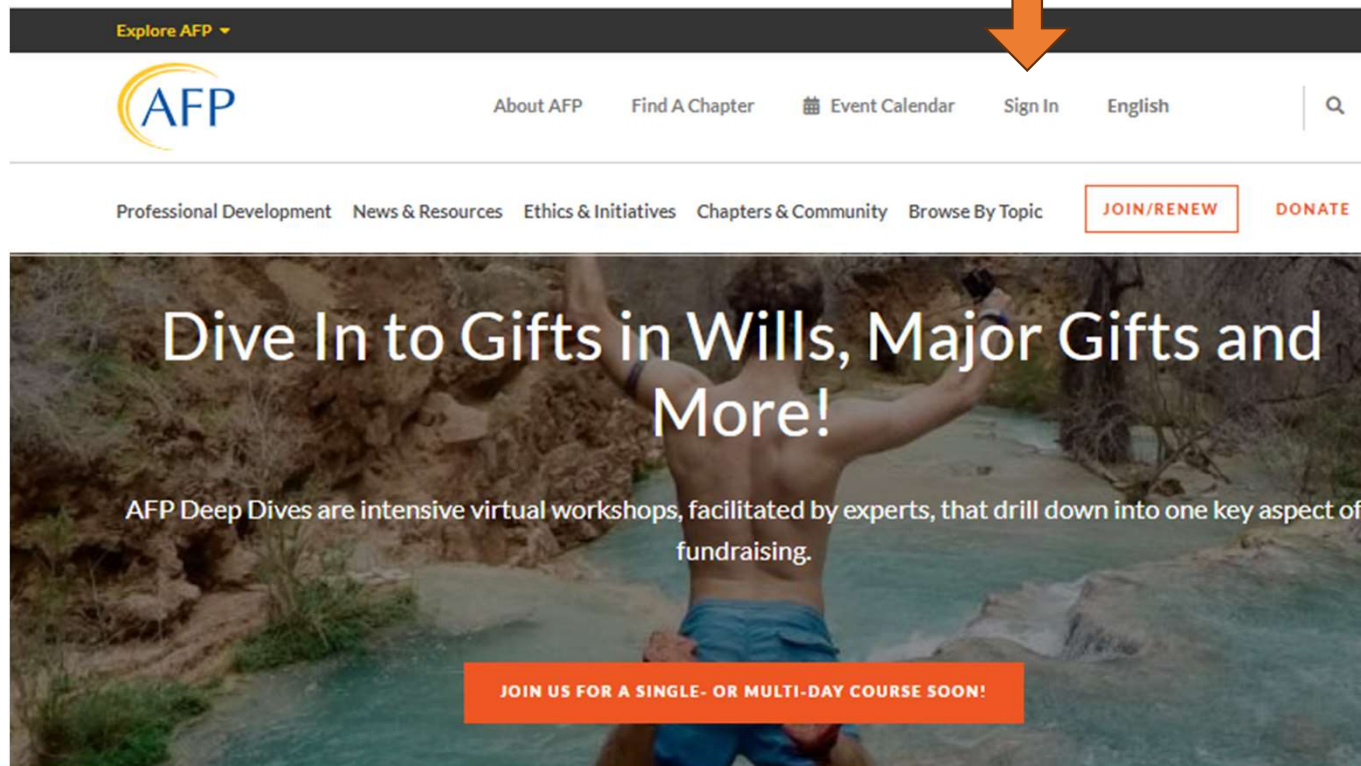


- NOT limited to one person!
- Default Access:
 - Chapter President
 - Chapter Membership Chair
 - Chapter Administrator
 - Chapter Foundation Development Chair
- Don't have access? Maybe AFP Global doesn't have record of your chapter board position. Just send us an email.
- Membership Reports and Foundation 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

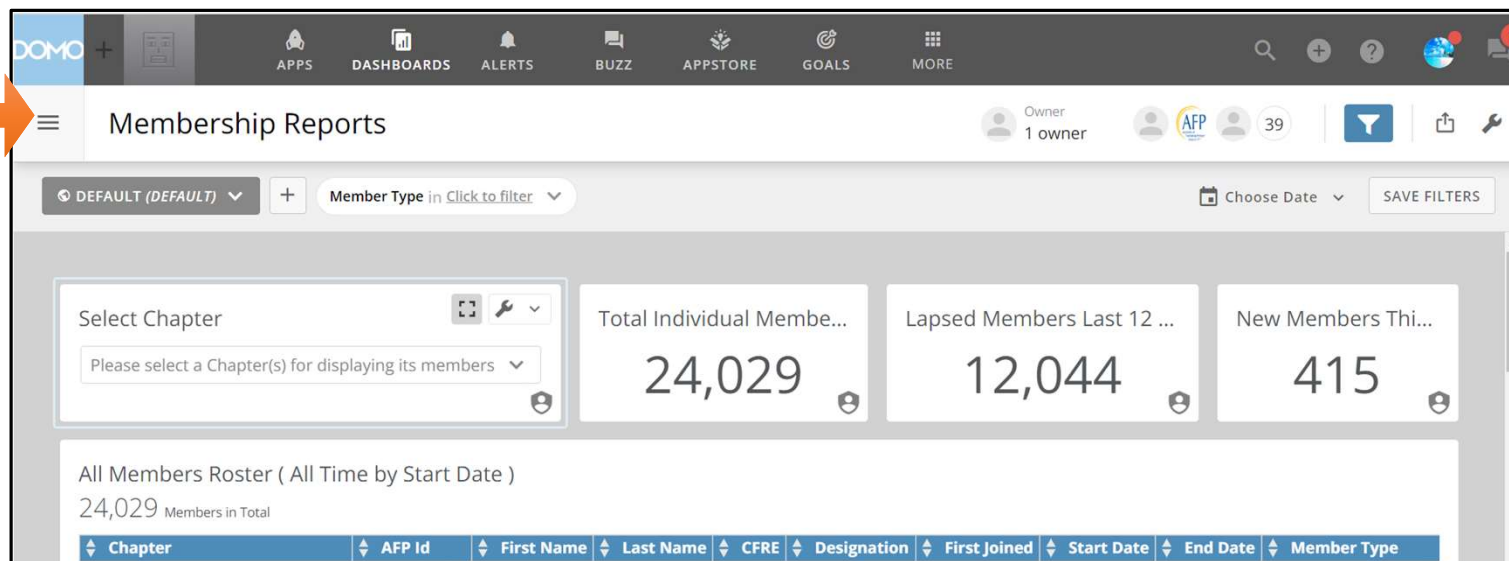


- Click 'My Account' under your name
- Click either link under 'Chapter Reports'

The screenshot shows the AFP member portal account page. The navigation bar includes the AFP logo, 'About AFP', 'Find A Chapter', 'Event Calendar', 'Welcome, Ayat Hassan', 'English', and a search icon. Below the navigation bar, there are links for 'Professional Development', 'News & Resources', 'Ethics & Initiatives', 'Chapters & Community', 'Browse By Topic', 'JOIN/RENEW', and 'DONATE'. The main content area is divided into three columns. The left column is titled 'MEMBER PROFILE' and includes links for 'My AFP Information', 'My Name & Profile', 'My Home and Business Address(es)', 'My Email | Fax | Phone Information and Preferences', 'My Communication Preferences', 'My Communication Opt-in/Opt-out Preferences (Including Advancing Philanthropy delivery)', 'My Committees', 'My Demographics', 'My Affinity Groups', 'Member Directory', and 'Renew My AFP Membership'. The middle column is titled 'ACCOUNT DETAILS' and includes links for 'Reset Password', 'Sign Out', 'ORDERS & DONATIONS', 'My Shopping Cart', 'Transaction History', 'Manage Your Payment Method', 'Donate to AFP Foundations', and 'Donation History'. The right column is titled 'MY BOOKMARKS' and includes a 'VIEW ALL' button. Below the 'MY BOOKMARKS' section is a 'MY INTERESTS' section with a 'CUSTOMIZE' button. A red arrow points to the 'AFP Chapter Foundation Reports' link under the 'CHAPTER REPORTS' section.

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.



Membership Reports

Owner 1 owner

Member Type in Click to filter

Choose Date SAVE FILTERS

Select Chapter

Please select a Chapter(s) for displaying its members

Total Individual Membe... 24,029

Lapsed Members Last 12 ... 12,044

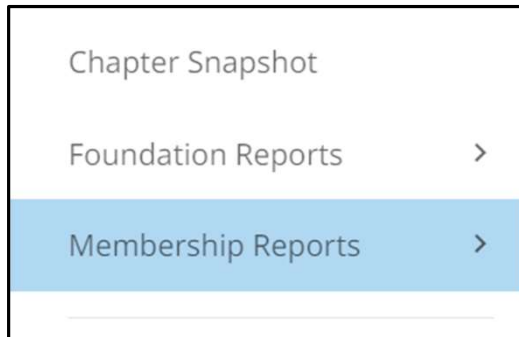
New Members Thi... 415

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
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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

The screenshot displays the AFP Membership Reports interface. On the left, a sidebar lists various report categories. The main content area features a 'Filter Views' dropdown menu, which is highlighted by an orange arrow. Below this, a list of chapters is shown, with 'AFP MO, St. Louis Regional Chapt' selected. To the right, three summary cards display key metrics: Total Individual Members (293), Lapsed Members Last 12 Months (155), and New Members This Month (1). A table of member data is visible below these cards, with columns for CFRE, Designation, First Joined, Start Date, End Date, and Member Type. The table is partially obscured by black redaction boxes. At the bottom, a 'Lapsed Member Report Last 12 Months' section indicates 155 members lapsed.

Membership Reports

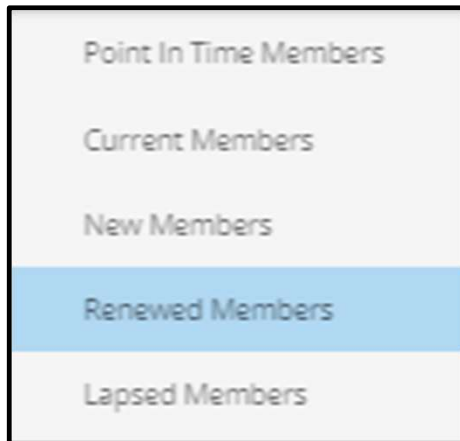


- Click on individual reports in the menu to access time period filters
- The Member Roster as of a point in time is only available in this menu

The screenshot shows the 'Membership Reports' dashboard. The sidebar menu on the left includes 'Overview', 'Favorites', 'Shared', 'Chapter Snapshot', 'Membership Reports', 'Point In Time Members', 'Current Members', 'New Members', 'Renewed Members', and 'Lapsed Members'. An orange arrow points to the 'New Members' item. The main content area features a 'Select Chapter' dropdown, a table of member statistics, and a table of member details.

CFRE	Designation	First joined	Start Date	End Date	Member Type	Email	Phone
se	MA/BA	04-03-2024	04-01-2024	03-31-2025	USD Professional (1Yr)		
se		04-03-2024	04-01-2024	03-31-2025	USD Professional (1Yr)		
se		03-22-2024	03-01-2024	02-28-2025	USD Young Professional (1Yr)		
e		03-21-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-21-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
e		03-18-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-12-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		
se		03-06-2024	03-01-2024	02-28-2025	USD Professional (1Yr)		

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.

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]

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
AFP [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Current	2024-03-01	2025-02-28	Former	2023-02-01	2024-01-31
AFP [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Current	2024-04-01	2025-03-31	Former	2023-04-01	2024-03-31

Membership Reports – Date Filters



- Filters available under ‘date range’

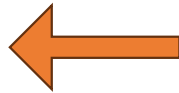
The screenshot shows a web interface for membership reports. At the top right, there is a dropdown menu labeled 'Use Date' with a downward arrow. An orange arrow points to this menu, which is open, showing two options: 'Date range' and 'Graph by', each with a 'Default' dropdown below it. On the left, there is a 'Select Chapter' dropdown menu with 'AFP' selected. Below this, the text 'Renewed Members This Month' is displayed, followed by '13 RenewedMembers'. A table with columns for Chapter, AFP Id, Credentialed Full Name, First Name, Last Name, First Joined, Start Date, End Date, and Organization is shown. The first few rows of the table are partially obscured by black redaction boxes.

Chapter	AFP Id	Credentialed Full Name	First Name	Last Name	First Joined	Start Date	End Date	Organization
AFP					03-13-2017	04-01-2024	03-31-2025	
AFP					03-27-2021	04-01-2024	03-31-2025	
AFP					12-28-2018	04-01-2024	03-31-2025	
AFP					04-05-2024	04-01-2024	03-31-2025	
AFP					03-16-2022	04-01-2024	03-31-2025	
AFP					04-16-1999	04-01-2024	03-31-2025	
AFP					02-12-1996	04-01-2024	03-31-2025	
AFP					05-15-1993	04-01-2024	03-31-2025	

Membership Reports – Date Filters





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



- 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.

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
AFP NJ, New Jersey Chapter	00000008254	Rachel	Ingber	false		11-08-2002	03-01-2024	02-28-2025	USD Large Non-Prc
AFP, ON London & Region Chapter	00000008308	Glenn	Waterman	true		11-19-2002	01-01-2024	12-31-2024	CAD Professional (
AFP OK, Eastern Chapter	00000008323	Pamela	Richardson	true		11-15-2002	01-01-2024	12-31-2024	USD Professional (
AFP, NS Nova Scotia Chapter	00000008339	Joanne	Bath	false		11-15-2002	07-01-2024	06-30-2025	CAD Associate (1yr
AFP LA, Baton Rouge Chapter	00000008398	Sharon	Bourgeois	false		11-22-2002	01-01-2024	12-31-2024	USD Retired (1yr)
AFP VA, Tri-State Chapter	000000132330	Churchill	Gibson	false		03-11-2010	04-01-2024	03-31-2025	USD Professional (
AFP, ON Greater Toronto Chapter	000000132606	Mary Lynne	Stewart	false	BA	06-29-1992	01-01-2024	12-31-2024	CAD Professional (
AFP, NS Nova Scotia Chapter	000000132608	Susan	Mullin	true		06-29-1992	03-01-2024	02-28-2025	CAD Large Non-Prc

Foundation Reports – Foundation Tally Report



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

Foundation Chapter Tally
in Foundation Reports

Owner 1 owner

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

Chapter Name
Select

Chapter Low Goal
\$250

Chapter High Goal
\$28,507

Chapter Tally | All Time

	AFP ID	Donor Name	Order Item Transaction Date	Donations	Pledges	Total Pledge & Donation Amount	Total Payment Received	Balance	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	\$485.74	\$0.00	\$485.74	\$485.74	\$0.00	Non-Alpha
			2023-12-20	\$1,769.40	\$0.00	\$1,769.40	\$1,769.40	\$0.00	Non-Alpha
			2023-12-20	\$240.00	\$0.00	\$240.00	\$240.00	\$0.00	Non-Alpha
			2023-04-11	\$50.00	\$0.00	\$50.00	\$50.00	\$0.00	Non-Alpha
			2023-05-09	\$20.00	\$0.00	\$20.00	\$20.00	\$0.00	Alpha
			2023-01-18	\$10.00	\$0.00	\$10.00	\$10.00	\$0.00	Non-Alpha

Foundation Reports – Donor Contact Information Report



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

Donor Contact Information
in Foundation Reports

Owner 1 owner 18

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	L-FRE	A-CFRE	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