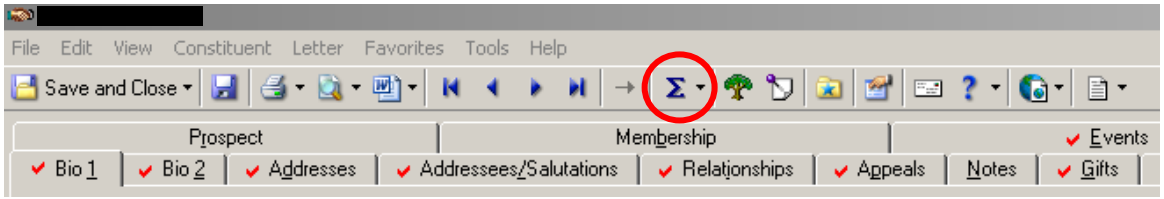
HOW TO RUN A GIFT SUMMARY & USE THE DASHBOARD

**Note: Personal information has been blocked to protect confidentiality.*

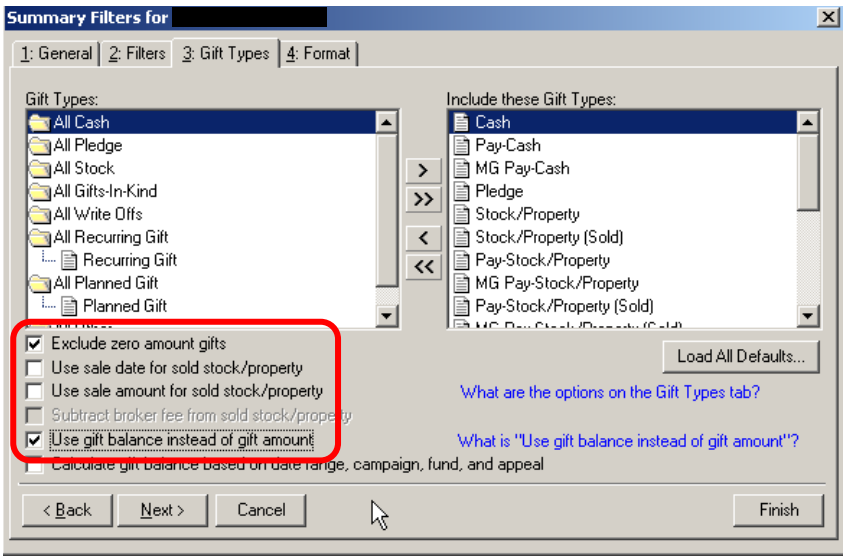
❖ Gift Summary

Open the donor, fund or appeal record and click on the gift summary icon. Here's an example on a donor record:



A report filter screen will appear. This screen gives you options for which gifts you want to count in your report:

- The General tab accepts date range criteria and lets you determine how matching gifts and soft credits should be handled.
- The Filters tab lets you report gifts to specific funds and appeals.
- The Gift Types tab lets you count certain types of gifts only. **As a general rule, you should not count Recurring Gifts, Write Offs and MG Write Offs**. These do not represent cash we have or ever will receive. **If you count pledge and pay-cash gift types, be sure to check the "Use gift balance instead of gift amount" box.** This will avoid double counting initial pledged amounts and payments against those pledges. See next page for a breakdown of gift types and which ones to pull.



- The Format tab has various formatting options for your report including options for currency, decimals and percents.

❖ Gift Type Definitions

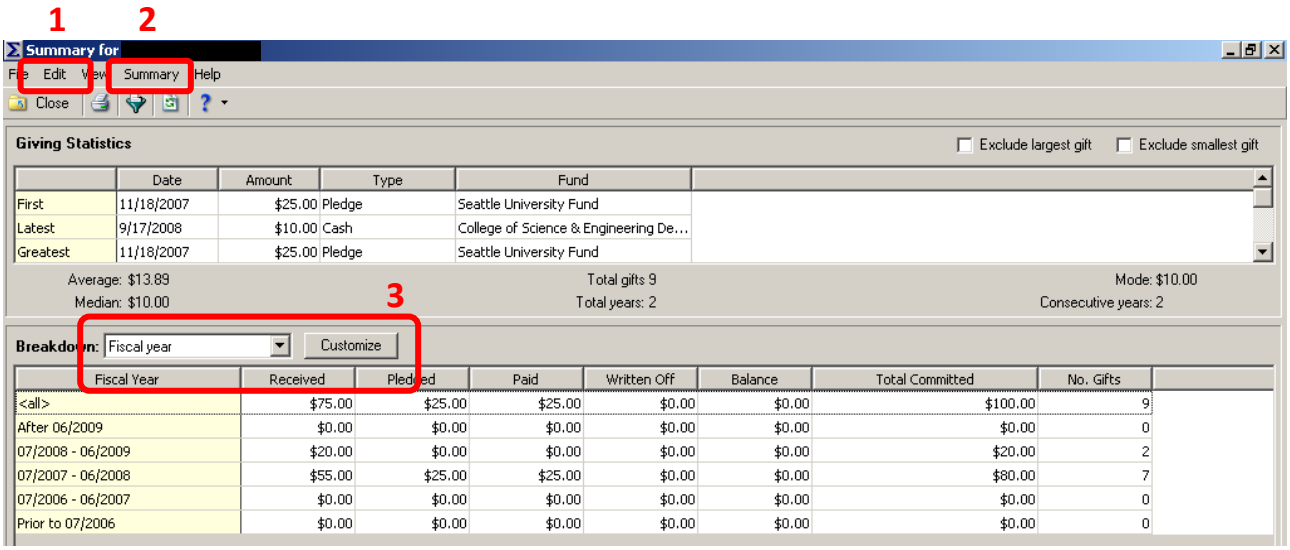
All Cash		**Include for comprehensive total (cash & pledges)**	**Include for current gift total (cash in door)**
Cash	Cash, Personal or Business Check, Credit Card or Direct Debit gift	X	X
Pay-Cash	Pledge payment of "Cash"	X	X
MG Pay-Cash	Matching Gift payment of "Cash"	X	X
All Stock			
Stock/Property	Gift of Stock/Property	X	X
Pay-Stock/Property	Pledge payment of "Stock/Property"	X	X
MG Pay-Stock/Property	Matching Gift payment of "Stock/Property"	X	X
All Gift-in-Kind			
Gift-in-Kind	Non-cash donations of materials or long-lived assets such as equipment, software, print materials, food	X	X
Pay-Gift-in-Kind	Pledge payment of "GIK"	X	X
MG Pay-Gift-in-Kind	Matching Gift payment of "GIK"	X	X
All Pledge			
Pledge	Commitment to make at gift at a future date	X	
MG Pledge	Projected donor company matching gift (booked when MG form is received)	X	
All Recurring Gift			
Recurring Gift Pay-Cash	The payment of the "Recurring Gift"	X	X
Recurring Gift	Recurring gifts are similar to pledges and are paid in installments and can occur for an unspecified length of time.	X	
Planned Gift			
Planned Gift	Deferred gifts or future commitments to SU	X	

GIFT TYPE vs. PAY METHOD

- **Gift Type** classifies a gift into one of the six categories above. It is significant for pulling accurate reports and queries.
- **Pay Method** specifies how a 'CASH' gift was made:
  - Cash (in this case, only greenbacks)
  - Personal or Business Check
  - Credit Card
  - Direct Debit (EFT from the bank)
  - Other (does not fit above options, eg. STOCK or GIK)

❖ Donor Summary Report

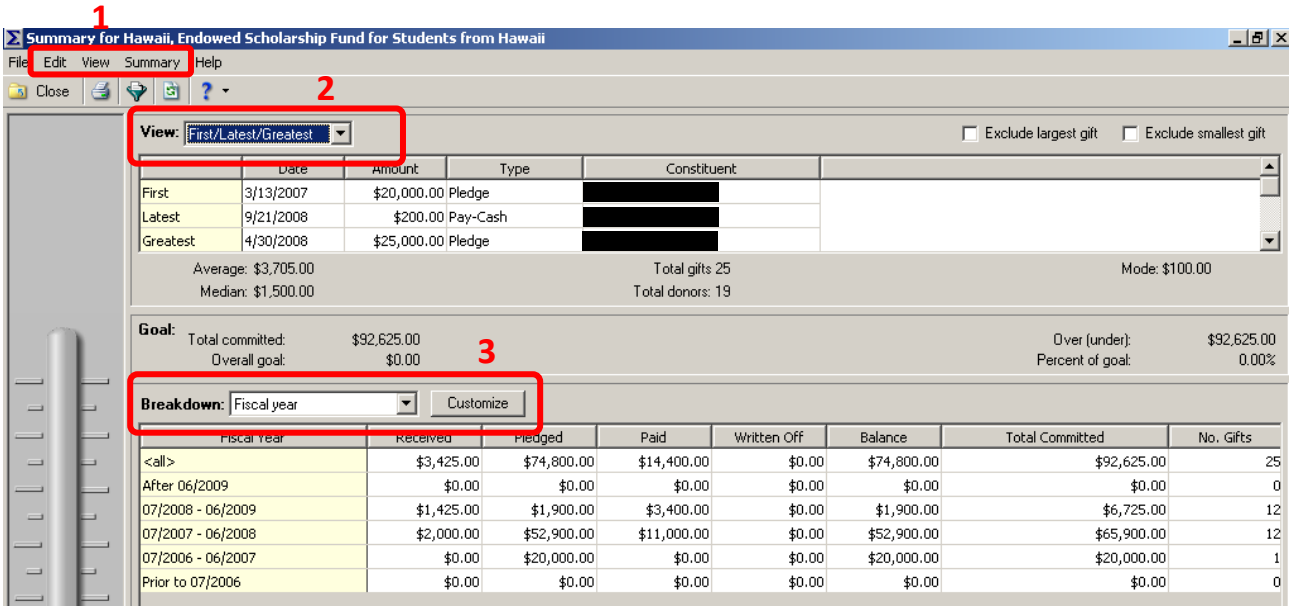
This report displays gifts for a specific donor:



1. The Edit option lets you export a selected grid to Excel. First click the grid you want to export, then click Edit and choose “Export grid to Excel”.
2. The Summary option lets you switch between grid and graph view. If you have clicked a row in the Breakdown grid, the summary option will allow you to view details for gifts belonging to the selected category.
3. You can change the breakdown to show different categories such as Fiscal Year, Calendar Year, Fund, Appeal, etc. Clicking the Customize button offers additional filtering options.

❖ Fund or Appeal Summary Report

These reports display summary information for specific funds and appeals:



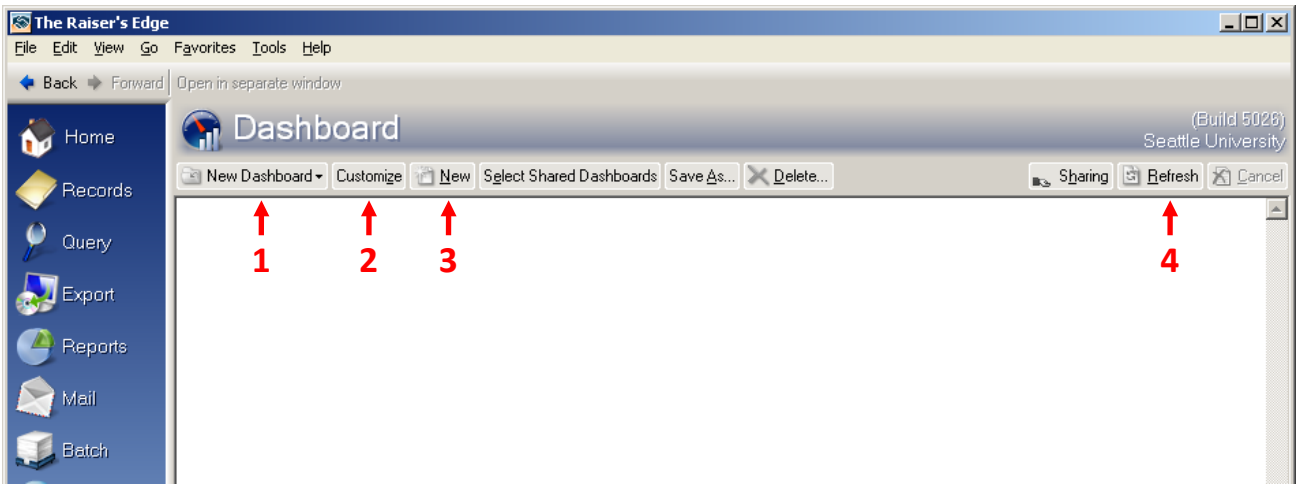
1. The Edit and Summary options work the same way as they do in the donor summary report.
2. Changing the View options allows you to view the top X donors or first/last/greatest gifts.
3. You can change the breakdown to show different categories such as Fiscal Year, Calendar Year, Fund, Appeal, etc. Clicking the Customize button offers additional filtering options.

❖ DASHBOARD

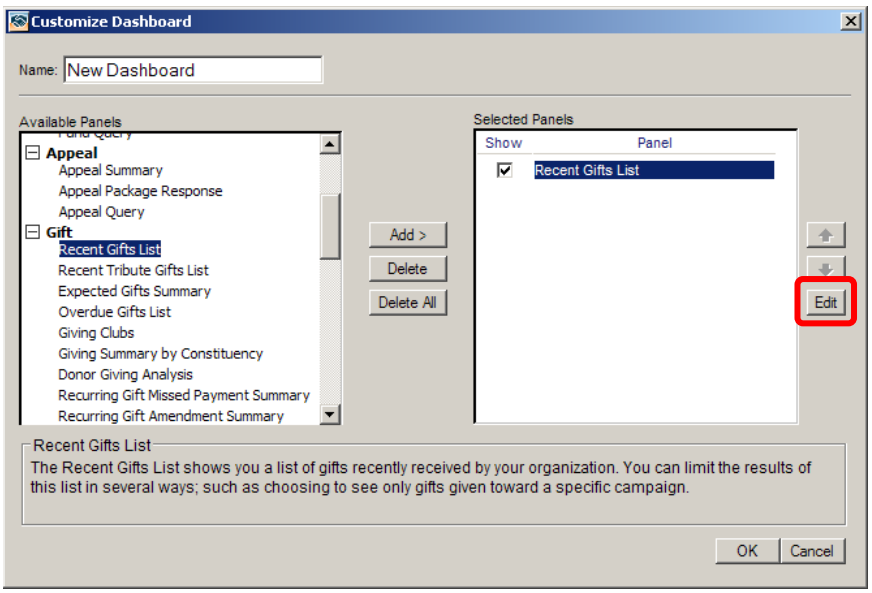
Dashboards allow you to view many panels of information on the same screen. You can load Dashboard panels on the

or

tab. As a general rule, you should place no more than 6 panels on your home page and no more than 8 panels on a Dashboard (increased number of panels slows performance considerably)

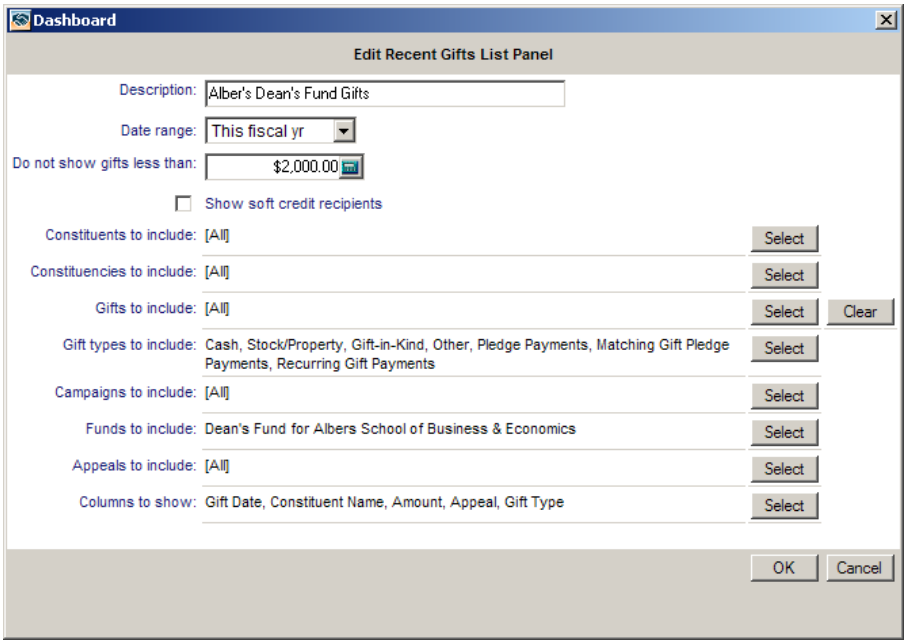


1. This dropdown helps in navigating between dashboards
2. Use this to add or delete panels
3. This creates a new Dashboard
4. **Dashboard panels need to be manually refreshed in order to get the most updated information.

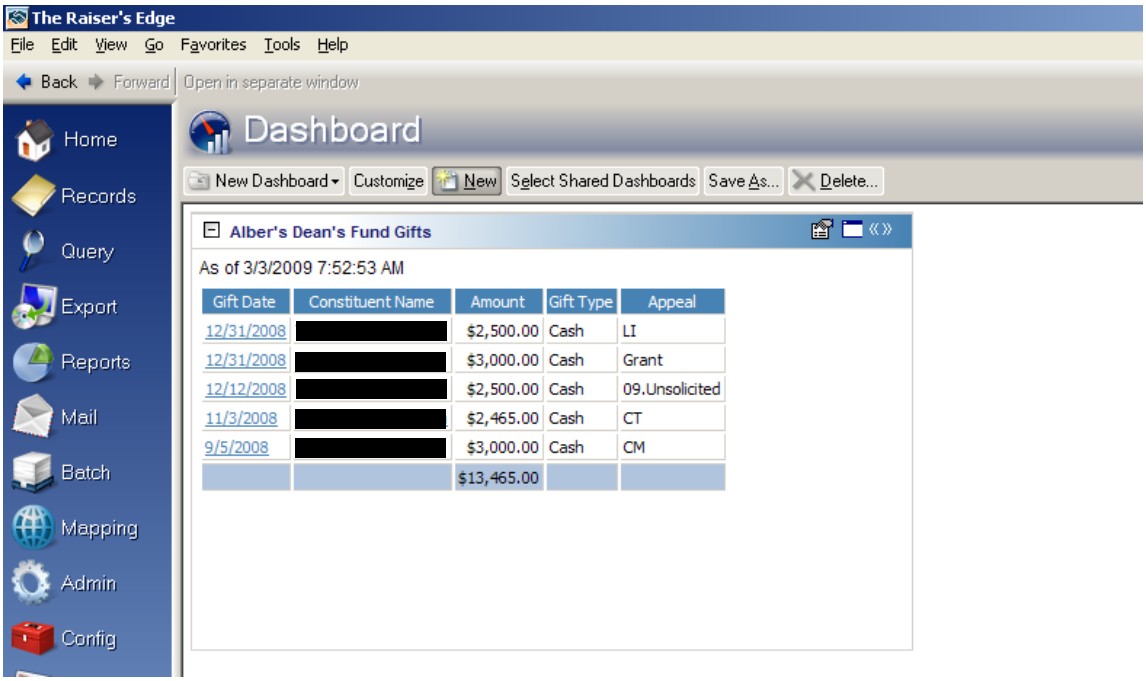


Once you've selected a panel option, click "Edit" to modify the panel. You can filter most fund and gift panels by date range, gift amount, funds, appeals, and gift types. You can also use queries if the information you desire is not available as a panel option.

***Remember to reference "Gift Type Definitions" in order to pull the information that is helpful for you.*



Once you have selected the parameters, click “OK” and your panel will load.



Clicking on any entry will take you right to the record.