

dp donorperfect

# COMMUNITY CONFERENCE **SPARK**





# Spark Better Results Using Powerful Reporting Features





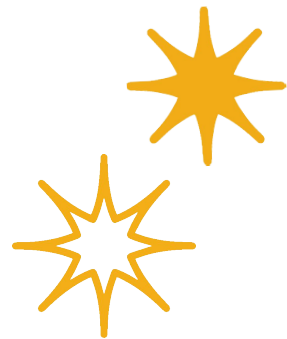
# Hello, my name is Amanda Tadrzynski

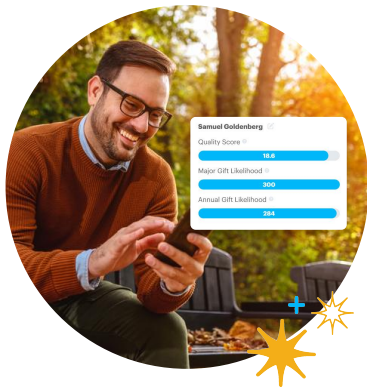
“One little spark of inspiration, is at the heart, of all creation.”

## CONNECT WITH ME:



atadrzynski@donorperfect.com





**Do you want a way to easily  
identify you top donors?**



**Do you want to include soft credits or pledges in your donors' giving totals?**



**Do you want a quick and  
easy way to filter for your  
donor segments?**



**Do You Want DonorPerfect  
to Help You Automate All  
These Tasks?**



# Introducing: Calculated Fields



Initial Gift Date 04/20/2015

Average Gift Amount \$1,034.23

Number of Gifts 13

Lifetime Gift Total \$13,445.00

Last Contact Type Mailing

Full Name Dorothy Gale

- Formulas inside fields
- Sums, Counts, Average, First, Last, plus many more
- Joins character fields
- System and User Created
- Updates data automatically
  - Uses include:
    - Filters
    - Reports
    - Export templates
    - Entry screens



# End Result: Identifying Top Donors



## Top Donors Listing Top 5 Donors for New Building Campaign For 5/2/2024 NEWBUILD2224

Name ▾	ID ▾	NEWBUILD2224 ▾	Last Date ▾	Last Amount ▾	Year-to-Date ▾	Last Year-to-Date ▾	Grand Total ▾
<a href="#">United Way of Pennsylvania</a>	<a href="#">506</a>	50,000.00	8/9/2023	50,000.00	50,000.00	0.00	50,000.00
<a href="#">Sandstone, Roger</a>	<a href="#">1</a>	36,916.00	4/10/2024	35.00	35.00	25,560.00	76,989.50
<a href="#">Mouse Click Company, The</a>	<a href="#">258</a>	35,500.00	5/23/2023	35,000.00	35,000.00	15,030.00	80,070.00
<a href="#">Education Plus Foundation</a>	<a href="#">256</a>	35,100.00	5/24/2023	35,000.00	35,000.00	25,000.00	110,100.00
<a href="#">Russo, Jade</a>	<a href="#">502</a>	25,000.00	4/18/2023	25,000.00	25,000.00	25,000.00	75,000.00
<b>Grand Totals</b>				<b>145,035.00</b>	<b>145,035.00</b>	<b>90,590.00</b>	<b>392,159.50</b>

# End Result: Gift Totals with Soft Credits or Pledges

## Donor Lifetime Giving Report with Softcredits & Pledges

Donor ID	First Name	Last Name	Lifetime Gift Total	Lifetime with Softcredits	Lifetime Giving with Pleges
123	James	<a href="#">Adams</a>	\$8,042.00	\$8,042.00	\$58,042.00
485	David & Florence	<a href="#">Afelskie</a>	\$2,600.00	\$27,600.00	\$2,600.00
308	Steven	<a href="#">Agarwal</a>	\$3,200.00	\$5,200.00	\$3,200.00
243	Mary	<a href="#">Anderson</a>	\$4,010.00	\$4,010.00	\$24,010.00



# End Result: Create Filters for Your Donor Segments

**Options and Filters** hide

☐ Include "NO MAIL" Names  
☐ Do Not Show Anonymous Donor Information

Sort Order:  
☒ Alpha ☐ Zip ☐ Other...

Title for Listing

**Filters (by DONOR)**  
[Manage Fields](#) [Clear Values](#)  
▼ Selection Filter  
no filter selected... [Apply](#)

**Main / Bio**  
Initial Gift Date  
 -   
Number of Gifts  
 -

[Run Report](#) ▼

Constituent Summary								
New Donors in the Last 12 Months								
Donor ID	Name	Address	Phone	Most Recent Date Given	Most Recent Amount Given	Fiscal Year-to-date	Lifetime Giving Total	Number of Gifts
1554	<a href="#">Marilyn Bostwick</a>	148 W. Carpenter Lane Philadelphia, PA 19150		03/07/2024	\$50.00	\$50.00	\$50.00	1
1566	<a href="#">John Deer</a>	1273 Saunders Rd Scarborough, ON M1J 3J1		04/27/2024	\$600.00	\$600.00	\$600.00	1
1568	<a href="#">Gale Dekarios</a>	124 Wizards Dr. Waterdeep, FL 12024		04/15/2024	\$15.00	\$15.00	\$15.00	1
1537	<a href="#">Jonathan Dougherty</a>	457 Madison Avenue Salt Lake City, UT 84116		01/24/2024	\$51.50	\$51.50	\$51.50	1
1545	<a href="#">Fly Like An Eagle Foundation</a>	123 Sofine Way Philadelphia, PA 19125	M:(267) 555-5555	02/13/2024	\$150.00	\$150.00	\$150.00	1
1548	<a href="#">Karen Haliburton</a>	987 6th St Panama City, FL 36578		02/20/2024	\$50.00	\$50.00	\$50.00	1
1526	<a href="#">Arlene Lesse</a>	333 Red Robin Rd Ambler, PA 19001		01/10/2024	\$51.50	\$51.50	\$51.50	1



# Creating Calculated Fields in Six Easy Steps

1



**Add a New  
Calculation**

2



**Build a  
New Field**

3



**Select Your  
Formula**

4



**Selection  
Filters &  
More  
Options  
(optional)**

5

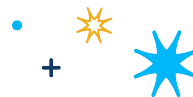


**Save Your  
Work**

6

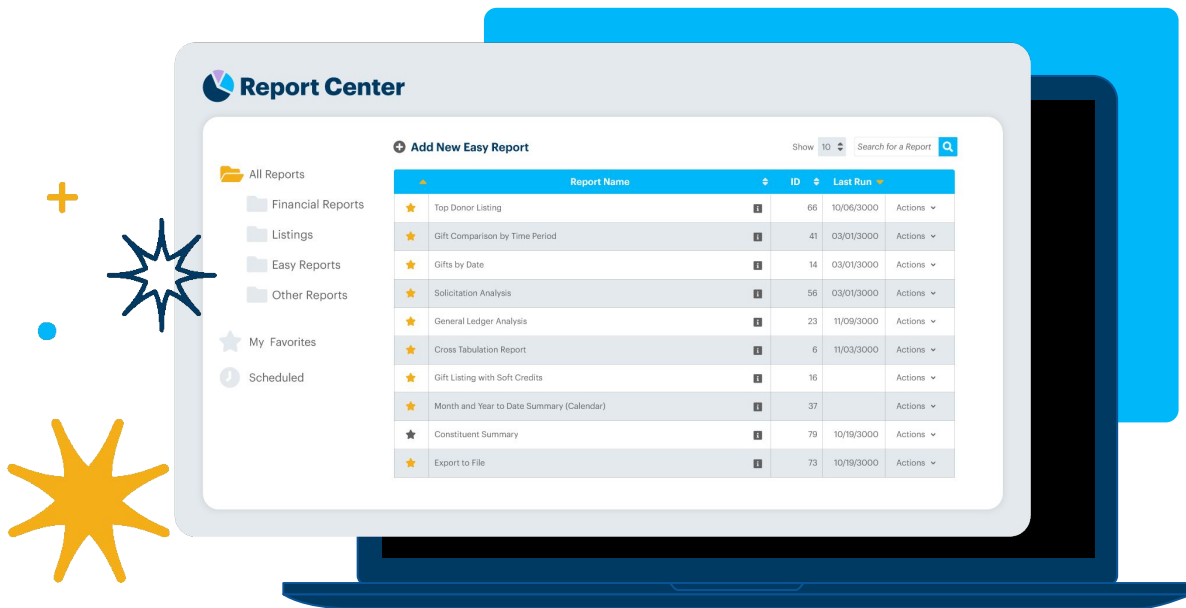


**Run  
Calculation**



# Helpful Reports

- Top Donor Listing
- Gift Range Report
- Constituent Summary
- Easy Reports
- Export Templates





# Q&A

