TM: Tip of the Week

RUN SIMILAR BUTTON

1

Reports in the Category

Report Name
Audit List-Receipts
Audit Trail – Donor & Pledge Daily Audit
Audit Trail – Donor & Receipt Summary-Campaign
Audit Trail – Donor & Receipt Summary-Patron
Campaign List
Charitable Receipts for Donor
Charitable Receipts for Donor (Annual)
Donation Cash Flow
Donor & Pledge Summary with Payments
Donor Behind in Their Pledge Payments
Donor Detail-Campaign & Year (Fiscal)
Donor Detail-Campaign & Year (Program)
Donor Detail-Donor & Pledge
Donor Detail-Giving Level
Donor Detail-Pledge History with Custom Fields (Fiscal)
Donor Detail-Pledge History with Custom Fields (Progra…
Donor Detail-Receipt
Donor Detail-Year (Fiscal)
Donor Detail-Year (Program)
Donor Giving Trend by Year (Fiscal)
Donor Giving Trend by Year (Program)
Donor History-Combined Giving Listing
Donor Program Insert-Giving Level
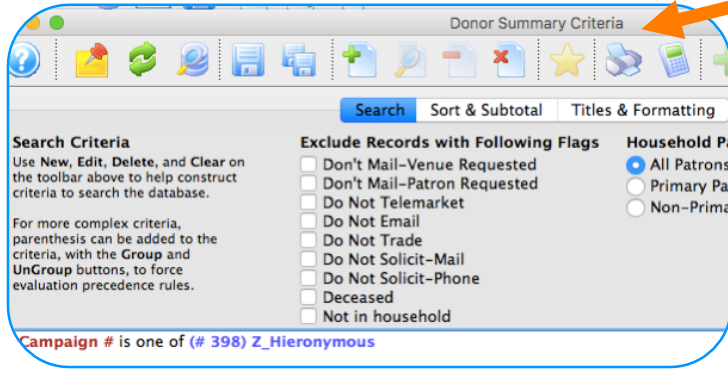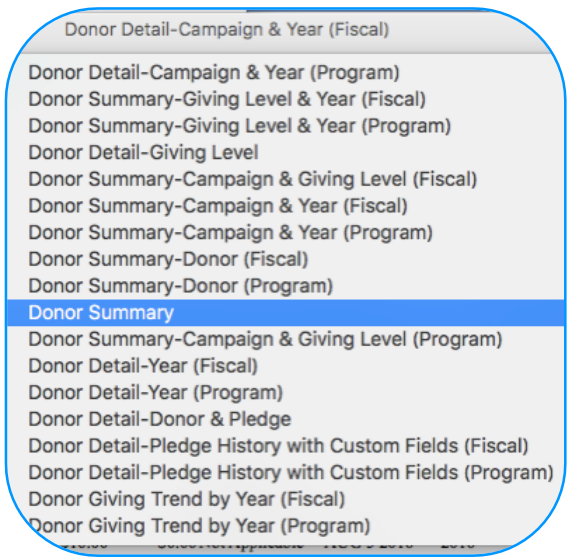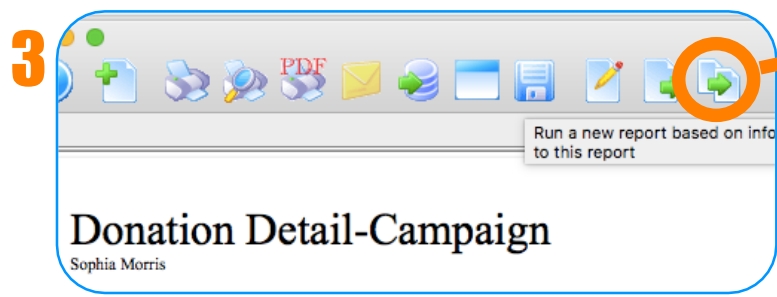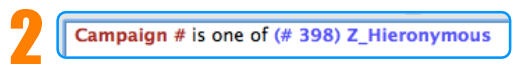Donor Program Insert-Giving Level with $$$ Total

NOT SURE WHICH REPORT TO USE?

1. **PICK ONE THAT SOUNDS CLOSE**

2. **RUN IT WITH DESIRED CRITERIA**

3. **CLICK RUN SIMILAR BUTTON**
   (SHOWS YOU A LIST OF REPORTS WITH THE SAME RELATED DATA FILES AS YOUR ORIGINAL SELECTION)

4. **SELECT ONE OF THE OPTIONS**
   (TM WILL OPEN A NEW REPORT BUILDER WINDOW & AUTOMATICALLY LOAD YOUR ORIGINAL CRITERIA)

2

Campaign # is one of (# 398) Z_Hieronymous

3

PDF

Run a new report based on info to this report

Donation Detail-Campaign
Sophia Morris

4

Donor Detail-Campaign & Year (Fiscal)

Donor Detail-Campaign & Year (Program)
Donor Summary-Giving Level & Year (Fiscal)
Donor Summary-Giving Level & Year (Program)
Donor Detail-Giving Level
Donor Summary-Campaign & Giving Level (Fiscal)
Donor Summary-Campaign & Year (Fiscal)
Donor Summary-Campaign & Year (Program)
Donor Summary-Donor (Fiscal)
Donor Summary-Donor (Program)
Donor Summary
Donor Summary-Campaign & Giving Level (Program)
Donor Detail-Year (Fiscal)
Donor Detail-Year (Program)
Donor Detail-Donor & Pledge
Donor Detail-Pledge History with Custom Fields (Fiscal)
Donor Detail-Pledge History with Custom Fields (Program)
Donor Giving Trend by Year (Fiscal)
Donor Giving Trend by Year (Program)

Donor Summary Criteria

Search Criteria
Use **New, Edit, Delete,** and **Clear** on the toolbar above to help construct criteria to search the database.

For more complex criteria, parenthesis can be added to the criteria, with the **Group** and **UnGroup** buttons, to force evaluation precedence rules.

Exclude Records with Following Flags
☐ Don't Mail-Venue Requested
☐ Don't Mail-Patron Requested
☐ Do Not Telemarket
☐ Do Not Email
☐ Do Not Trade
☐ Do Not Solicit-Mail
☐ Do Not Solicit-Phone
☐ Deceased
☐ Not in household

Household Pa
◉ All Patrons
○ Primary Pa
○ Non-Prima

Campaign # is one of (# 398) Z_Hieronymous

THE FAST WAY TO TEST & COMPARE RELATED REPORTS !