

CRM Report Cookbook

CRM has two flexible, custom reports that can generate a variety of reports for fundraising management:

- Revenue>Reports>BSA Appeal Constituent Report (OLTP)
- Revenue>Reports>BSA Appeal Progress (OLTP)

The types of reports and the information contained in the reports can be tailored by selecting different combinations of report parameters. This “cookbook” shows several graphical “recipes” that show how to select various combinations of report parameters to generate several different types of reports. The examples shown here are not exhaustive and users are encouraged to experiment with the reports and become familiar with the range of reporting information that can be generated by these reports by selecting different combinations of report parameters.

Additionally, there is an export version of each report that has the same name but with ‘Export’ in the title instead of ‘Report’. These versions are handy when you want to generate the data for further slicing/dicing in Excel.

In each recipe, the key report parameters that must be selected/adjusted are **highlighted**. All remaining report parameters can remain in their default state.

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List of Donors for Annual Appeal (Default Parameters)

Description: This example shows how to generate a report listing donors for a selected annual appeal. In this example, all of the default options are selected for the “tabbed” parameters (Include, Exclude, Breakdown, Filter).

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council Report Code: 2020

Annual Appeal(s): All
(102) F20 - 2020 Friends of Scouting
(104) ADM20 - Maui Annual Recognition Dinne...
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All
(102) CC11 - Capital Campaign 2010
(102) CCMY - Capital Campaign
(102) CCMY - Capital Campaign Multi-Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

- Include All
- Include Prior Year 1 Giving Include Current Year Constituent Appeal/Response (Worked) Info
- Include Prior Year 2 Giving Include Current Year \$0 Pledge (Worked) Info
- Include Prior Year 3 Giving Include Donor Status Stats

Include Exclude Breakdown Filter

- Exclude All
- Exclude Current Year Donors Exclude Current Year Solicitees Exclude Constituents Marked as Do Not Solicit
- Exclude Current Year Non-Donors Exclude Current Year Non-Solicitees Exclude Constituents Marked as Deceased
- Exclude Current Year Worked Constituents (via an Appeal Response) Exclude Current Year Non-Donor, Non-Solicitees Exclude Constituents Marked as Inactive
- Exclude Current Year Worked Constituents (via a \$0 Pledge)

Include Exclude Breakdown Filter

- Breakdown by All
- Break Down by BSA Structure Anchor to Latest Revenue or Constituent Appeal
- Break Down by Giving Category Sort by Name (Last/First) Only
- Break Down by Solicitor
- Break Down by Revenue BSAFR Group

Include Exclude Breakdown Filter

As of Date: Filter on BSA Structure:

Current Year Minimum Giving: Filter on Giving Category:

Prior Year(s) Minimum Giving: Filter on Solicitor:

Prior Year Minimum is Cumulative

List of \$500+ Donors for Annual Appeal by BSA Structure

Description: This example shows how to generate a report listing \$500+ donors for a selected annual appeal and broken down by BSA Structure.

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council Report Code: 2020

Annual Appeal(s):
All
(102) F20 - 2020 Friends of Scouting
(104) ADM20 - Maui Annual Recognition Dinne...
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s):
All
(102) CC11 - Capital Campaign 2010
(102) CCMY - Capital Campaign
(102) CCMY - Capital Campaign Multi Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

Exclude All

Exclude Current Year Donors Exclude Current Year Solicitees Exclude Constituents Marked as Do Not Solicit

Exclude Current Year Non-Donors Exclude Current Year Non-Solicitees Exclude Constituents Marked as Deceased

Exclude Current Year Worked Constituents (via an Appeal Response) Exclude Current Year Non-Donor, Non-Solicitees Exclude Constituents Marked as Inactive

Exclude Current Year Worked Constituents (via a \$0 Pledge)

Include Exclude Breakdown Filter

Breakdown by All

Break Down by BSA Structure Anchor to Latest Revenue or Constituent Appeal

Break Down by Giving Category Sort by Name (Last/First) Only

Break Down by Solicitor

Break Down by Revenue BSAFR Group

Include Exclude Breakdown Filter

As of Date: Filter on BSA Structure:

Current Year Minimum Giving: 500 Filter on Giving Category:

Prior Year(s) Minimum Giving: Filter on Solicitor:

Prior Year Minimum is Cumulative

List of Community Donors for Annual Appeal for a Specific Solicitor

Description: This example shows how to generate a report listing Community donors for a selected annual appeal and for a specific solicitor.

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council Report Code: 2020

Annual Appeal(s): All (102) F20 - 2020 Friends of Scouting (104) ADM20 - Maui Annual Recognition Dinne... (104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All (102) CC11 - Capital Campaign 2010 (102) CCMY - Capital Campaign (102) CCMY - Capital Campaign Multi Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

Exclude All

Exclude Current Year Donors Exclude Current Year Solicitees Exclude Constituents Marked as Do Not Solicit

Exclude Current Year Non-Donors Exclude Current Year Non-Solicitees Exclude Constituents Marked as Deceased

Exclude Current Year Worked Constituents (via an Appeal Response) Exclude Current Year Non-Donor, Non-Solicitees Exclude Constituents Marked as Inactive

Exclude Current Year Worked Constituents (via a \$0 Pledge)

Include Exclude Breakdown Filter

Breakdown by All

Break Down by BSA Structure Anchor to Latest Revenue or Constituent Appeal

Break Down by Giving Category Sort by Name (Last/First) Only

Break Down by Solicitor

Break Down by Revenue BSAFR Group

Include Exclude Breakdown Filter

As of Date: Filter on BSA Structure:

Current Year Minimum Giving: Filter on Giving Category: Community

Prior Year(s) Minimum Giving: Filter on Solicitor: John Smith

Prior Year Minimum is Cumulative

List of Current Year (2020) Donors for Multi-year Appeal (Default Parameters)

Description: This example shows how to generate a report listing current year (2020) donors for a selected multi-year appeal. In this example, all of the default options are selected for the “tabbed” parameters (Include, Exclude, Breakdown, Filter).

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council

Report Code:

Annual Appeal(s):

Multi-year Appeal(s):

- All
- (102) CC11 - Capital Campaign 2010
- (102) CCMY - Capital Campaign
- (102) CCMY - Capital Campaign Multi Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

- Include All
- Include Prior Year 1 Giving
- Include Prior Year 2 Giving
- Include Prior Year 3 Giving
- Include Current Year Constituent Appeal/Response (Worked) Info
- Include Current Year \$0 Pledge (Worked) Info
- Include Donor Status Stats

Include Exclude Breakdown Filter

- Exclude All
- Exclude Current Year Donors
- Exclude Current Year Non-Donors
- Exclude Current Year Worked Constituents (via an Appeal Response)
- Exclude Current Year Worked Constituents (via a \$0 Pledge)
- Exclude Current Year Solicitees
- Exclude Current Year Non-Solicitees
- Exclude Current Year Non-Donor, Non-Solicitees
- Exclude Constituents Marked as Do Not Solicit
- Exclude Constituents Marked as Deceased
- Exclude Constituents Marked as Inactive

Include Exclude Breakdown Filter

- Breakdown by All
- Break Down by BSA Structure
- Break Down by Giving Category
- Break Down by Solicitor
- Break Down by Revenue BSAFR Group
- Anchor to Latest Revenue or Constituent Appeal
- Sort by Name (Last/First) Only

Include Exclude Breakdown Filter

As of Date:

Current Year Minimum Giving:

Prior Year(s) Minimum Giving:

Filter on BSA Structure:

Filter on Giving Category:

Filter on Solicitor:

Prior Year Minimum is Cumulative

Unworked List for Annual Appeal by BSA Structure with 1 Year History

Description: This example shows how to generate a report listing unworked donors for a selected annual appeal by BSA Structure and including one year of giving history.

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council Report Code: 2020

Annual Appeal(s): All
(102) F20 - 2020 Friends of Scouting
(104) ADM20 - Maui Annual Recognition Dinne...
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All
(102) CC11 - Capital Campaign 2010
(102) CCMY - Capital Campaign
(102) CCMY - Capital Campaign Multi-Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

Include All

Include Prior Year 1 Giving Include Current Year Constituent Appeal/Response (Worked) Info

Include Prior Year 2 Giving Include Current Year \$0 Pledge (Worked) Info

Include Prior Year 3 Giving Include Donor Status Stats

Include Exclude Breakdown Filter

Exclude All

Exclude Current Year Donors Exclude Current Year Solicitees Exclude Constituents Marked as Do Not Solicit

Exclude Current Year Non-Donors Exclude Current Year Non-Solicitees Exclude Constituents Marked as Deceased

Exclude Current Year Worked Constituents (via an Appeal Response) Exclude Current Year Non-Donor, Non-Solicitees Exclude Constituents Marked as Inactive

Exclude Current Year Worked Constituents (via a \$0 Pledge)

Include Exclude Breakdown Filter

Breakdown by All

Break Down by BSA Structure Anchor to Latest Revenue or Constituent Appeal

Break Down by Giving Category Sort by Name (Last/First) Only

Break Down by Solicitor

Break Down by Revenue BSAFR Group

Include Exclude Breakdown Filter

As of Date: Filter on BSA Structure:

Current Year Minimum Giving: Filter on Giving Category:

Prior Year(s) Minimum Giving: Filter on Solicitor:

Prior Year Minimum is Cumulative

Unworked List for Annual Appeal by BSAFR Group with 3 Year History and Donor Status

Description: This example shows how to generate a report listing unworked donors for a selected annual appeal by BSAFR Group and including three years of giving history and donor status information.

BSA Appeal Constituent Report (OLTP)

Site: Aloha Council Report Code: 2020

Annual Appeal(s): All
(102) F20 - 2020 Friends of Scouting
(104) ADM20 - Maui Annual Recognition Dinne...
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All
(102) CC11 - Capital Campaign 2010
(102) CCMY - Capital Campaign
(102) CCMY - Capital Campaign Multi-Year

Only include multi-year appeal revenue for: 2020

Include Exclude Breakdown Filter

Include All

Include Prior Year 1 Giving Include Current Year Constituent Appeal/Response (Worked) Info
 Include Prior Year 2 Giving Include Current Year \$0 Pledge (Worked) Info
 Include Prior Year 3 Giving Include Donor Status Stats

Include Exclude Breakdown Filter

Exclude All

Exclude Current Year Donors Exclude Current Year Solicitees Exclude Constituents Marked as Do Not Solicit
 Exclude Current Year Non-Donors Exclude Current Year Non-Solicitees Exclude Constituents Marked as Deceased
 Exclude Current Year Worked Constituents (via an Appeal Response) Exclude Current Year Non-Donor, Non-Solicitees Exclude Constituents Marked as Inactive
 Exclude Current Year Worked Constituents (via a \$0 Pledge)

Include Exclude Breakdown Filter

Breakdown by All Anchor to Latest Revenue or Constituent Appeal
 Break Down by BSA Structure Sort by Name (Last/First) Only
 Break Down by Giving Category
 Break Down by Solicitor
 Break Down by Revenue BSAFR Group

Include Exclude Breakdown Filter

As of Date: Filter on BSA Structure:
Current Year Minimum Giving: Filter on Giving Category:
Prior Year(s) Minimum Giving: Filter on Solicitor:
 Prior Year Minimum is Cumulative

Overall Appeal Progress for Annual Appeal (Default Parameters)

Description: This example shows how to generate a report showing the overall progress for an annual appeal. In this example, all of the default options are selected for the “tabbed” parameters (Include, Breakdown, Other).

BSA Appeal Progress Report (OLTP)

Site:	Atlanta Area Council	Report Code:	2020
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Annual Appeal(s):	(092) OOD20 - Operating Other Direct <input type="checkbox"/>	Multi-year Appeal(s):	All <input type="checkbox"/>
	(092) R20 - 2020 Eagle Scout Recognition <input type="checkbox"/>		(092) C08 - Tradition Meets Tomorrow Campaign <input type="checkbox"/>
	(092) S20 - 2020 Friends of Scouting <input checked="" type="checkbox"/>		(092) C15 - Keller Carlock Pavillion <input type="checkbox"/>
	(092) TM20 - 2020 Tributes & Memorial <input type="checkbox"/>		(092) C19 - Igniting Leaders Capital Campaign <input type="checkbox"/>

Only include multi-year appeal revenue for: 2020

Include Breakdown Other

Include All

<input type="checkbox"/> Include Prior Year 1 Giving	<input type="checkbox"/> Include BSAFR Group Goals	<input type="checkbox"/> Include Donor Status Stats
<input type="checkbox"/> Include Prior Year 2 Giving	<input type="checkbox"/> Include Year-Over-Year Comparisons	<input type="checkbox"/> Included Worked/Unworked Stats
<input type="checkbox"/> Include Prior Year 3 Giving	<input type="checkbox"/> Include Lapsed Donor Opportunity Amounts	<input type="checkbox"/> Include Current Year Constituent Appeal/Response (Worked) Info
<input type="checkbox"/> Include Basic Giving Stats	Lapsed Donor Recapture Rate Goal %: 50	<input type="checkbox"/> Include Current Year \$0 Pledge (Worked) Info

Include Breakdown Other

Breakdown by All

Break Down by BSA Structure

Break Down by Giving Category

Break Down by Solicitor

Break Down by Revenue BSAFR Group

Include Breakdown Other

As of Date: |

Adjust As of Date for Prior Years

Overall Appeal Progress for Annual Appeal as of a Specific Date

Description: This example shows how to generate a report showing the overall progress for an annual appeal. In this example, all of the default options are selected for the “tabbed” parameters (Include, Breakdown, Other).

Note: This report does not “walk back” adjustments when an As of Date is specified. For example, suppose a \$1000 pledge is entered on 3/1/2020 and is then adjusted to \$100 on 4/15/2020. If this report is then run on 5/1/2020 with an As of Date of 3/31/2020, the example pledge would be included in the report with its adjusted value of \$100 even though the adjustment occurred after the As of Date. Therefore, this report is a suitable management report for assessing the progress of an appeal as of a certain date but is not intended to be an accounting tool for GL reconciliation.

BSA Appeal Progress Report (OLTP)

Site:	Atlanta Area Council	Report Code:	2020
Annual Appeal(s):	<ul style="list-style-type: none">(092) OOD20 - Operating Other Direct(092) R20 - 2020 Eagle Scout Recognition(092) S20 - 2020 Friends of Scouting(092) TM20 - 2020 Tributes & Memorial	Multi-year Appeal(s):	<ul style="list-style-type: none">All(092) C08 - Tradition Meets Tomorrow Campaign(092) C15 - Keller Carlock Pavillion(092) C19 - Igniting Leaders Capital Campaign
<input type="checkbox"/> Only include multi-year appeal revenue for: 2020			
Include Breakdown Other			
<input type="checkbox"/> Include All			
<input type="checkbox"/> Include Prior Year 1 Giving			
<input type="checkbox"/> Include Prior Year 2 Giving			
<input type="checkbox"/> Include Prior Year 3 Giving			
<input type="checkbox"/> Include Basic Giving Stats			
<input type="checkbox"/> Include BSAFR Group Goals			
<input type="checkbox"/> Include Year-Over-Year Comparisons			
<input type="checkbox"/> Include Lapsed Donor Opportunity Amounts			
Lapsed Donor Recapture Rate Goal %: 50			
<input type="checkbox"/> Include Donor Status Stats			
<input type="checkbox"/> Included Worked/Unworked Stats			
<input type="checkbox"/> Include Current Year Constituent Appeal/Response (Worked) Info			
<input type="checkbox"/> Include Current Year \$0 Pledge (Worked) Info			
Include Breakdown Other			
<input type="checkbox"/> Breakdown by All			
<input type="checkbox"/> Break Down by BSA Structure			
<input type="checkbox"/> Break Down by Giving Category			
<input type="checkbox"/> Break Down by Solicitor			
<input type="checkbox"/> Break Down by Revenue BSAFR Group			
Include Breakdown Other			
As of Date: 6/30/2020			
<input type="checkbox"/> Adjust As of Date for Prior Years			

Current Year Appeal Progress by BSA Structure Compared to Last Year at the Same Time

Description: This example shows how to generate a report showing the current year progress for an annual appeal compared to last year at the same time broken down by BSA Structure.

BSA Appeal Progress Report (OLTP)

Site: Atlanta Area Council Report Code: 2020

Annual Appeal(s):
 (092) OOD20 - Operating Other Direct
 (092) R20 - 2020 Eagle Scout Recognition
 (092) S20 - 2020 Friends of Scouting
 (092) TM20 - 2020 Tributes & Memorial

Multi-year Appeal(s):
 All
 (092) C08 - Tradition Meets Tomorrow Campaign
 (092) C15 - Keller Carlock Pavillion
 (092) C19 - Igniting Leaders Capital Campaign

Only include multi-year appeal revenue for: 2020

Include Breakdown Other

Include All
 Include Prior Year 1 Giving
 Include Prior Year 2 Giving
 Include Prior Year 3 Giving
 Include Basic Giving Stats

Include BSAFR Group Goals
 Include Year-Over-Year Comparisons
 Include Lapsed Donor Opportunity Amounts
Lapsed Donor Recapture Rate Goal %: 50

Include Donor Status Stats
 Included Worked/Unworked Stats
 Include Current Year Constituent Appeal/Response (Worked) Info
 Include Current Year \$0 Pledge (Worked) Info

Include Breakdown Other

Breakdown by All
 Break Down by BSA Structure
 Break Down by Giving Category
 Break Down by Solicitor
 Break Down by Revenue BSAFR Group

Include Breakdown Other

As of Date:
 Adjust As of Date for Prior Years

Overall Fundraising Progress for Current Year (All Appeals)

Description: This example shows how to generate a report showing the overall fundraising progress for the current year for all appeals.

Note: The report can handle of a maximum of 27 appeals. If you have more than 27 appeals, you will need to run the report in “chunks.” For example, if you have 26 annual appeals and 3 active multi-year appeals, you could run the annual appeals and the multi-year appeals separately and combine the results (in this scenario, it is recommended that you run the BSA Appeal Progress Export (OLTP) report so that you can export the results to Excel to facilitate combining the results from multiple report runs).

Note: The report header includes the name(s) of the selected appeals. When one appeal is selected, the entire appeal name is displayed. When multiple appeals are selected, a comma-separated list of the appeal short names is displayed. An appeal’s short name is the second word of the appeal name. For example, the short name of “(092) S20 – 2020 Friends of Scouting” is “S20” (for this reason, it is recommended that councils follow the traditional appeal naming convention where the first word of the appeal name is the council number in parentheses and the second word is the appeal’s short name followed by the appeal’s description).

BSA Appeal Progress Report (OLTP)

Site: Atlanta Area Council

Report Code: 2020

Annual Appeal(s): All

- (092) A20 - 2020 Peach of an Athlete
- (092) COD20- Capital Other Direct
- (092) E20 - 2020 Endowment

Multi-year Appeal(s): All

- (092) C08 - Tradition Meets Tomorrow Campaign
- (092) C15 - Keller Carlock Pavillion
- (092) C19 - Igniting Leaders Capital Campaign

Only include multi-year appeal revenue for: 2020

Include Breakdown Other

Include All

Include Prior Year 1 Giving Include BSAFR Group Goals Include Donor Status Stats

Include Prior Year 2 Giving Include Year-Over-Year Comparisons Included Worked/Unworked Stats

Include Prior Year 3 Giving Include Lapsed Donor Opportunity Amounts Include Current Year Constituent Appeal/Response (Worked) Info

Include Basic Giving Stats Lapsed Donor Recapture Rate Goal %: 50 Include Current Year \$0 Pledge (Worked) Info

Include Breakdown Other

Breakdown by All

Break Down by BSA Structure

Break Down by Giving Category

Break Down by Solicitor

Break Down by Revenue BSAFR Group

Include Breakdown Other

As of Date: |

Adjust As of Date for Prior Years

The Kitchen Sink – Year-Over-Year Appeal Progress Analysis

Description: This example shows how to generate a complete year-over-year analysis of a specific appeal. The analysis period covers 4 years (current year plus 3 prior years) and includes the following year-over-year comparatives:

- Contributions, Payments, Write-offs and Balances – Totals for each year and year-over-year comparisons by dollars and percentages
- BSAFR Group Goals – Goals status for each year and year-over-year comparisons by dollars and percentages
- Donor Counts, Gift Counts, Average Gifts – Amounts for each year and year-over-year comparisons by dollars and percentages
- Donor Status Stats – Donor Status counts and dollars for each year. Donor statuses are:
 - New: A donor that has given in the current year but has not given in the prior reporting years
 - Renewed: A donor that has given the same amount in the current year as last year
 - Upgraded: A donor that has given more in the current year than last year
 - Downgraded: A donor that has given less in the current year than last year
 - Recovered: A donor that has given in the current year, did not give last year but gave prior to that in the reporting period
 - Lapsed: A donor that has not given in the current year but gave in a prior reporting year
 - Note: These statuses are calculated for the selected reporting period. For example, a donor that gave 10 years ago and has now given in the current year will show as a New donor because the donor’s prior gift is outside of the reporting period (4 years in this example).

BSA Appeal Progress Report (OLTP)

Site: Atlanta Area Council Report Code: 2020

Annual Appeal(s):
(092) OOD20 - Operating Other Direct
(092) R20 - 2020 Eagle Scout Recognition
(092) S20 - 2020 Friends of Scouting
(092) TM20 - 2020 Tributes & Memorial

Multi-year Appeal(s):
All
(092) C08 - Tradition Meets Tomorrow Campaign
(092) C15 - Keller Carlock Pavillion
(092) C19 - Igniting Leaders Capital Campaign

Only include multi-year appeal revenue for: 2020

Include Breakdown Other

Include All

Include Prior Year 1 Giving Include BSAFR Group Goals Include Donor Status Stats
 Include Prior Year 2 Giving Include Year-Over-Year Comparisons Included Worked/Unworked Stats
 Include Prior Year 3 Giving Include Lapsed Donor Opportunity Amounts Include Current Year Constituent Appeal/Response (Worked) Info
 Include Basic Giving Stats Lapsed Donor Recapture Rate Goal %: 50 Include Current Year \$0 Pledge (Worked) Info

Include Breakdown Other

Breakdown by All
 Break Down by BSA Structure
 Break Down by Giving Category
 Break Down by Solicitor
 Break Down by Revenue BSAFR Group

Include Breakdown Other

As of Date:
 Adjust As of Date for Prior Years