PowerBase Fundraising Training Documents
July 31-August 1, 2014

DashBoard Worksheet

Dashboard	Current	Last Year	Target	Notes
Number of individual donors				
Amount raised from individuals				
Average individual gift				
Number of new donors				
Renewal rate				
% of donors who increased their gift				
Number of sustainers				
Number of new contacts added to PowerBase				
% growth in database				

Comparing PowerBase Fundraising Activities

Fundraising Approaches	Direct Mail	Phone Bank	Email Appeals	Personal Asks	Peer to Peer: Personal Campaign Pages	Gala Events	Proposals	Convert to Sustainers	Canvass
The Amount of Effort	Moderate to Low	High	Low	High	High	High	Low	Low	High
Who	Staff or Vendor	Staff; Members; Board	Staff	Staff; Members; Board	Members with Staff Support	Staff; Members; Board	Staff	Staff	Staff
Coordination Rquired	Low	High	Low	High	High	High	Low	Low	High
Additional Cost	Expensive	Cheap	Cheap	Cheap	Cheap	Expensive	Cheap	Cheap	Expensive
Organizational Visibility	Moderate	Low	Moderate	Low	High	High	Low	Low	Very High
Conversion Rate	Low	Moderate	Low	High	High	Moderate	Depends	Moderate	Low
Payback for Effort and Cost	Low	Moderate	Moderate	Moderate	High	Low	High	High	Moderate
Frequency	Quarterly or less often	Can be annual, quarterly or monthly	Quarterly or more often	Annual	Annual or semi-annual	Annual	On going	On going	On going

PowerBase Donor Activity Matrix

Fundraising Approaches	Donor Capacity	Direct Mail	Phone Bank	Email Appeals	Personal Asks	Peer to Peer: Personal Campaign Pages	Gala Events	Proposals	Convert to Sustainers	Canvass	Frequency of touches
New Prospects		Maybe	Maybe	Maybe		Yes	Yes			Yes	Once or Twice
New Donors	<100	Yes	Yes	Yes			Yes	Yes		Yes	Twice
	<250	Yes	Yes	Yes	Maybe		Yes				Twice
	>250				Yes		Yes				Twice
Renewing Donors	<100	Yes	Yes	Yes			Yes		Yes	Yes	Annually
	<250	Yes	Yes	Yes	Maybe		Yes		Yes	Maybe	Semi Annually
	>250				Yes		Yes	Yes	Yes		Quarterly
Recover Lapsed Donors	<100	Yes	Yes	Yes							Annually
	<250	Yes	Yes	Yes	Maybe		Maybe				Annually
	>250				Yes		Yes	Yes			Annually
Grassroots Members	<100	Yes	Yes	Yes		Yes	Yes		Yes	Yes	Monthly
	<250	Yes	Yes	Yes	Maybe	Yes	Yes		Yes	Yes	Monthly
	>250 (Usually N/A)				Yes	Yes	Yes	Yes	Yes		Monthly
Foundations					Yes		Yes	Yes			Quarterly

Event Planning Worksheet

Fundraising Approaches	Donor Capacity	Gala Events	How Many	Average Amount	Total Expected	Cost	Net Expected	Lead	Who Helps	Notes
New Prospects		Yes								
New Donors	<100	Yes								
	<250	Yes								
	>250	Yes								
Renewing Donors	<100	Yes								
	<250	Yes								
	>250	Yes								
Recover Lapsed Donors	<100									
	<250	Maybe								
	>250	Yes								
Grassroots Members	<100	Yes								
	<250	Yes								
	>250 (Usually N/A)	Yes								
Foundations		Yes								

Personal Ask Work Sheet

Fundraising Approaches	Donor Capacity	Personal Asks	How Many	Average Amount	Total Expected	Cost	Net Expected	Lead	Who Helps	Notes
New Prospects										
New Donors	<100									
	<250	Maybe								
	>250	Yes								
Renewing Donors	<100									
	<250	Maybe								
	>250	Yes								
Recover Lapsed Donors	<100									
	<250	Maybe								
	>250	Yes								
Grassroots Members	<100									
	<250	Maybe								
	>250 (Usually N/A)	Yes								

Home » CiviCRM

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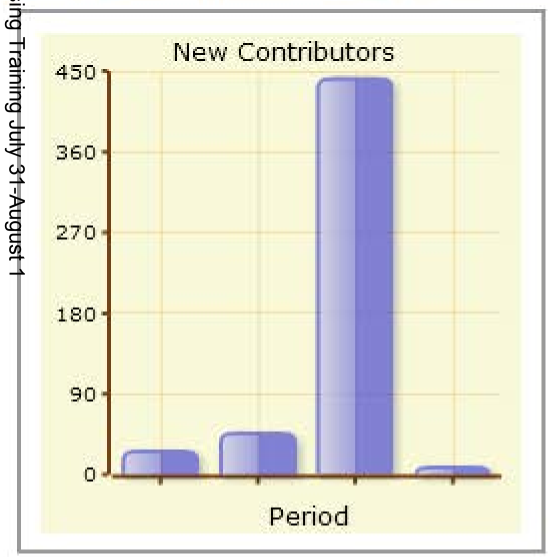
Configure Your Dashboard

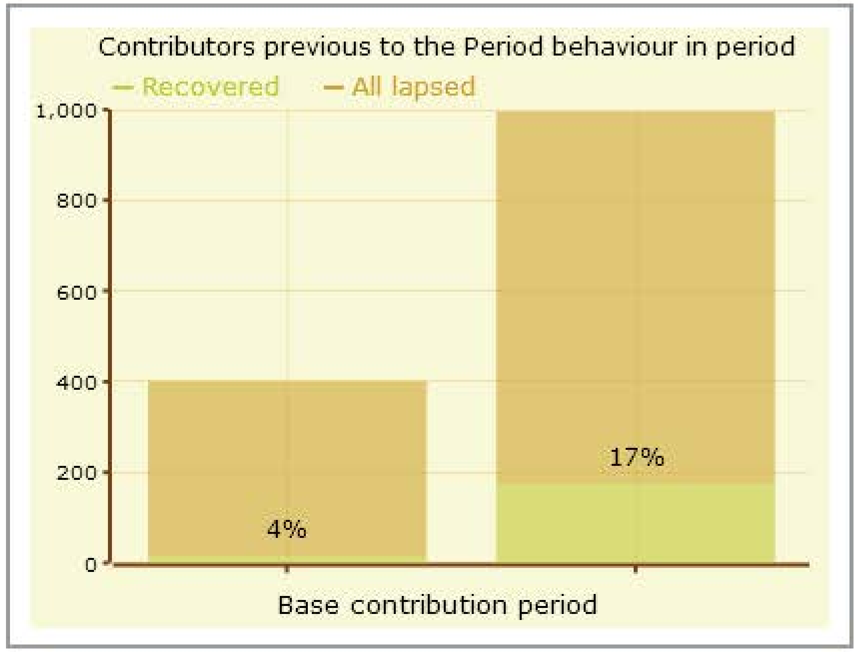
Key Numbers Report

	This Year	Percent Change	Last Year
Total Number of Donors	277	-38%	446
Amount Raised	$ 17,556.00	-69%	$ 57,087.00
Amount Raised From Individuals	$ 17,556.00	-69%	$ 57,087.00
Average Donation From Individuals	$ 63.00	-50%	$ 128.00
Individual Donors who Increased their donation	22	1000%	2
Sustaining Members	0	0%	0
New Contacts in Database	49	n/a	0

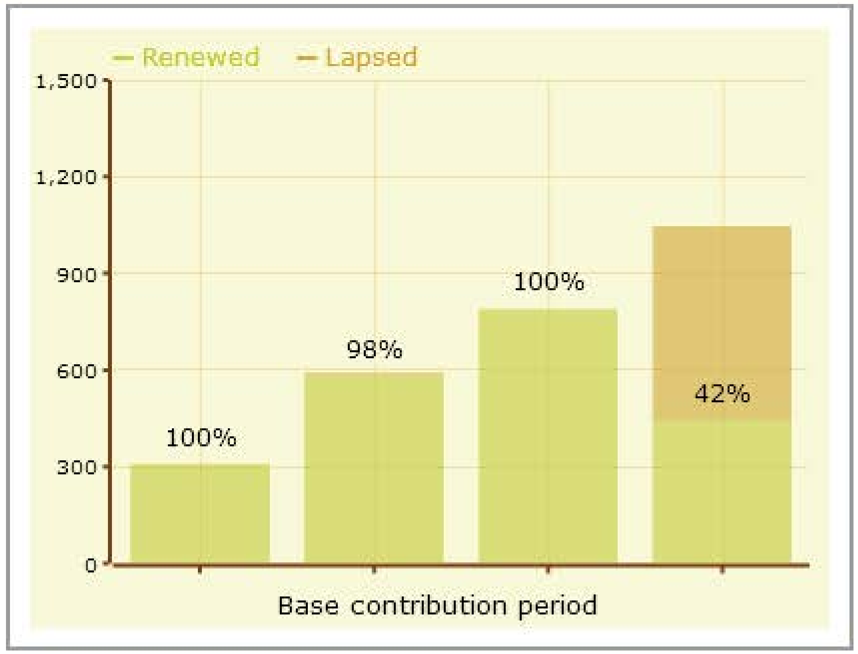
New Contributors by Quarter



Contributor Recovery Report

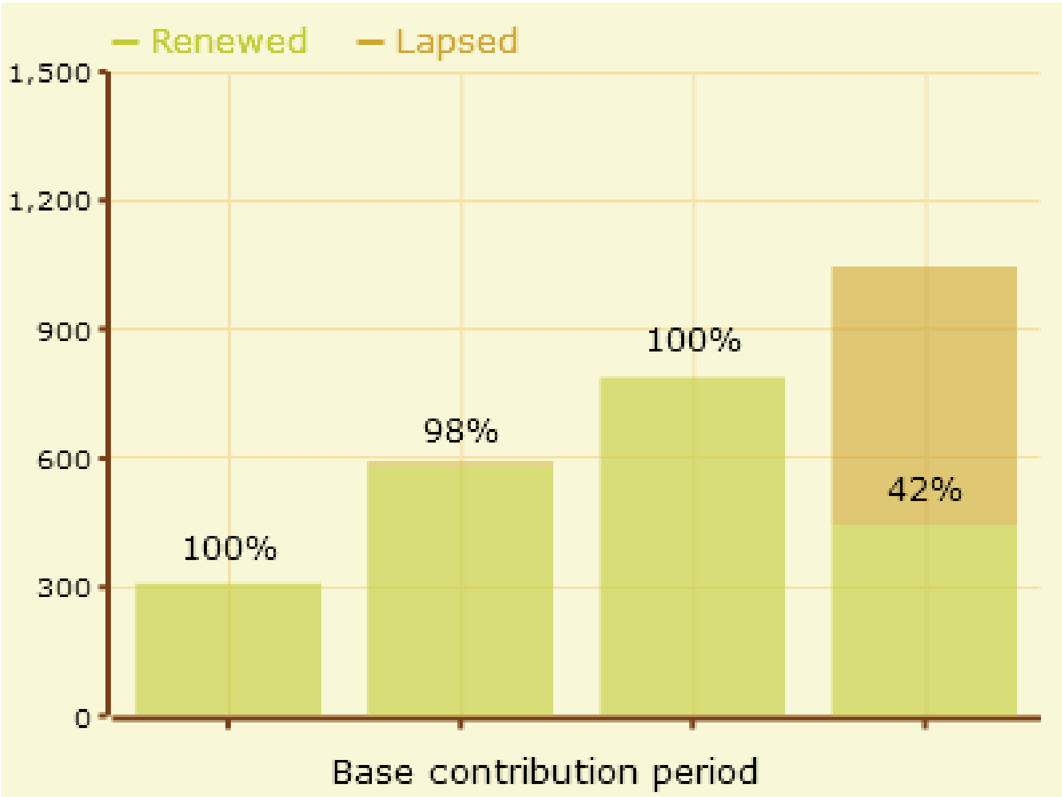


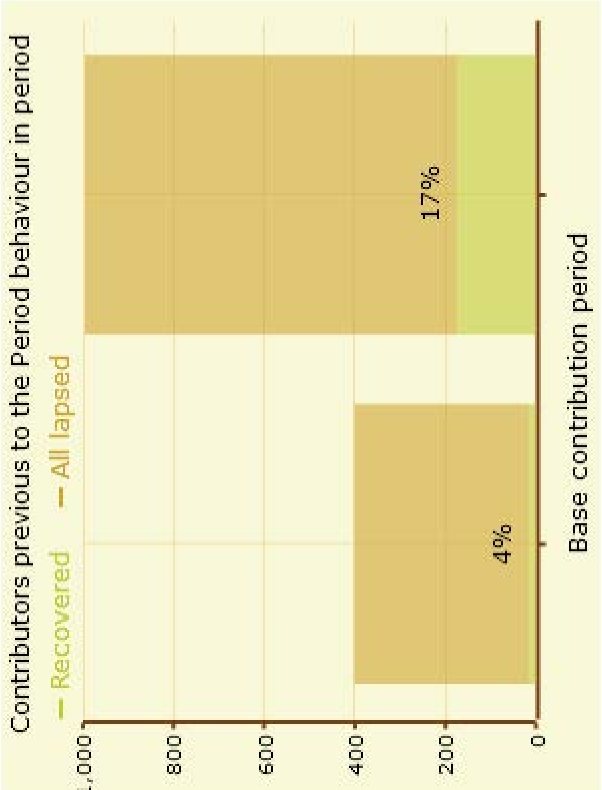
Annual Renewal Rate

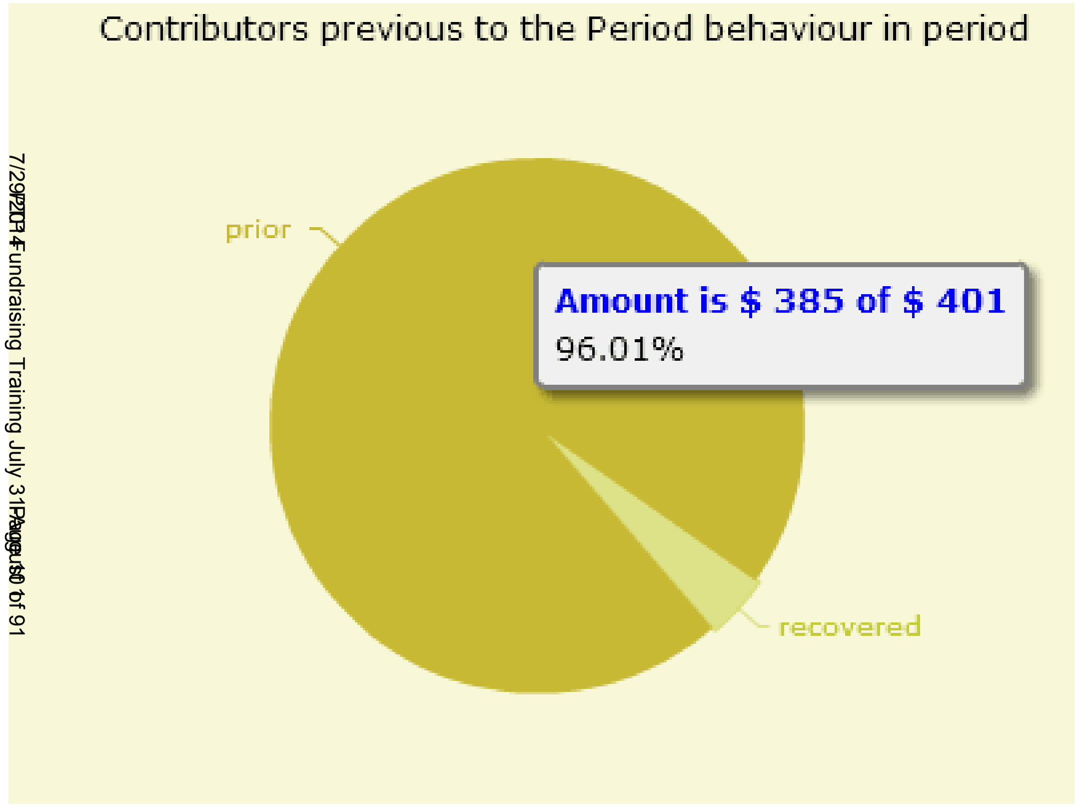


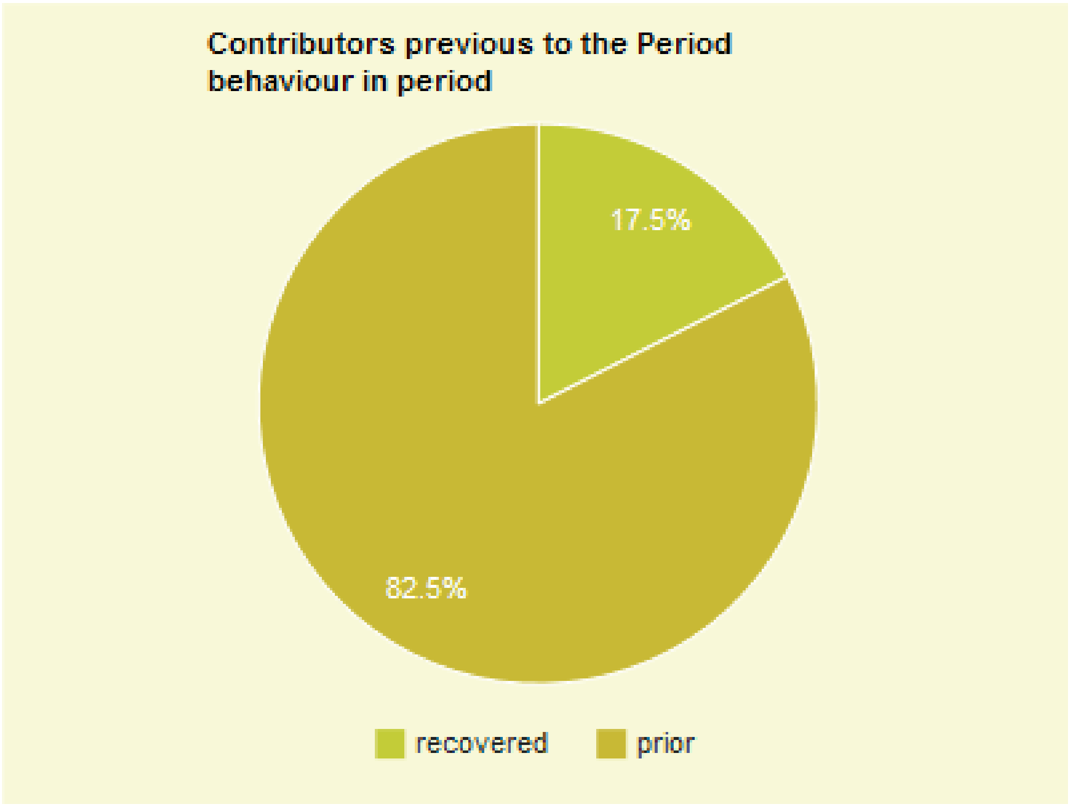
Previous Highlight all Match case

Annual Renewal Rate




Contributors previous to the Period behaviour in period
Recovered
All lapsed
1,000
800
600
400
200
0
17%
4%
Base contribution period


Contributors previous to the Period behaviour in period
prior
Amount is $ 385 of $ 401
96.01%
recovered


Contributors previous to the Period behaviour in period
17.5%
82.5%
recovered
prior

DashBoard Worksheet

Dashboard	Current	Last Year	Target	Notes
Number of individual donors				
Amount raised from individuals				
Average individual gift				
Number of new donors				
Renewal rate				
% of donors who increased their gift				
Number of sustainers				
Number of new contacts added to PowerBase				
% growth in database				

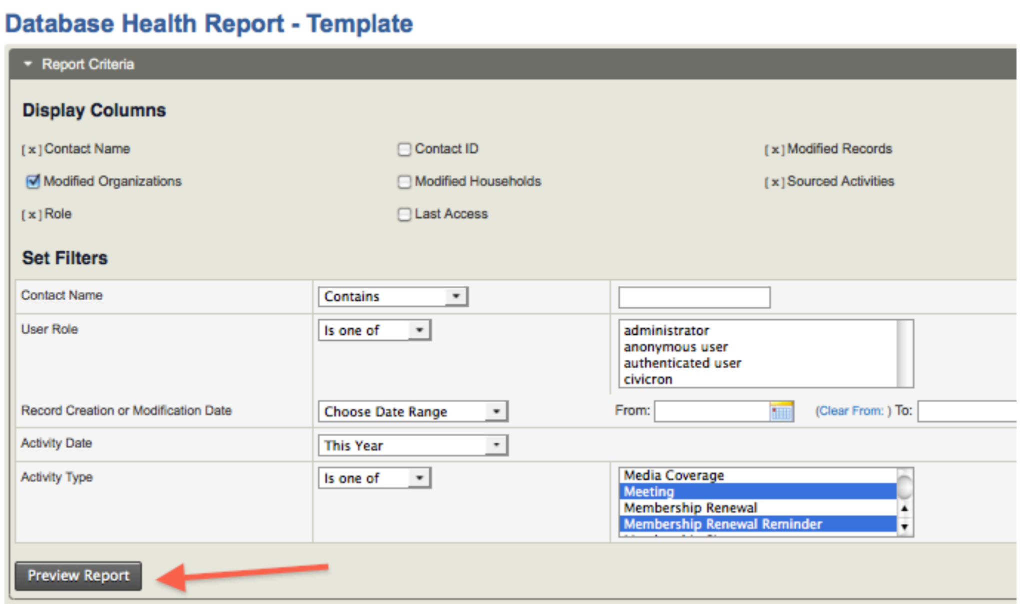
Add a Dashlet to Your Homepage

Is there a report you use (or want to use) often? Make your PowerBase homepage *way* more useful by adding the reports that you need to see right to your PB homepage, also known as the dashboard.

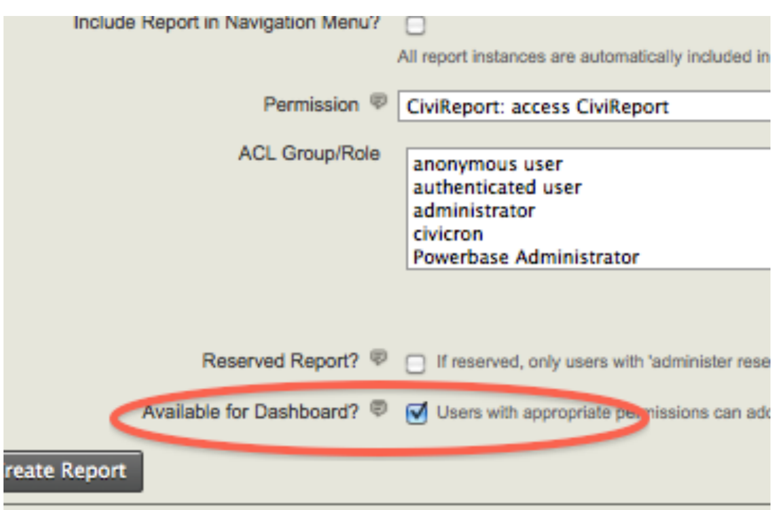
If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

Here are the steps to create a report that can be used as dashlet:

- Click **Reports** > **Create Reports from Templates**
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click **Preview Report**.

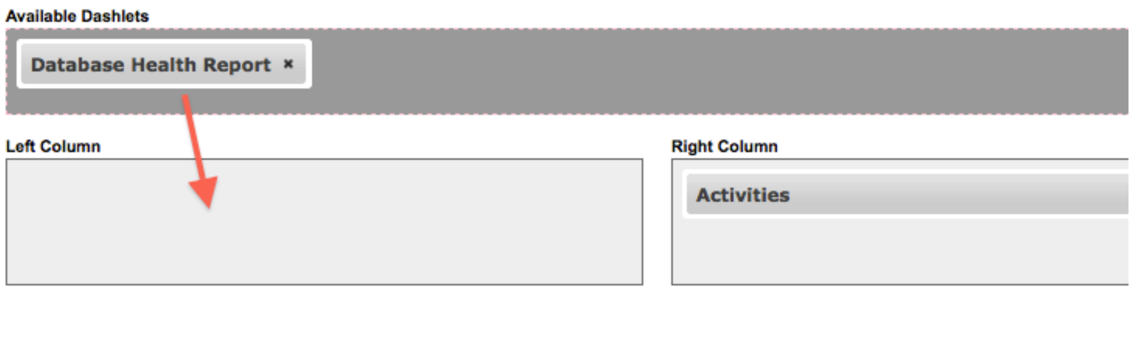


- Once there, click **Create Report**.
- At the bottom of the Create Report section, there's a checkbox that says "**Available for Dashboard?**"



Add a Dashlet to Your Homepage

- Click it, and users with permission to see that information (i.e. if it's about events, users who have permissions to see event-related stuff) will be able to add that dashlet.
- Once you've enabled the dashlet, click **Home**.
- Click **Configure Dashboard**. Drag the dashlet from the "Available Dashlets" box to the column where you'd like it to appear.



Once you can view the report on your dashboard, you will have the latest info at your fingertips. If you suspect any data isn't up to date, just click **Refresh Dashboard Data** at the top right of the dashboard.

*Don't hesitate to reach out to support if you need help with creating reports at support@progressivetech.org or 612-724-2600 x 114

Read more about the dashboard and dashlets in the manual: http://book.civicrm.org/user/current/the-user-interface/menu-dashboard-and-dashlets/

Key Numbers Report

Introduction

The **PowerBase Key Numbers Report** is designed to give you a quick look at the state of your fundraising and database growth rate. It gives you comparative year over year (or other time period) results for fields like these:

- Total Number of Donors
- Total Number of Individual Donors
- Total Number of Organization Donors
- Amount Raised
- Amount Raised From Individuals
- Amount Raised From Organizations
- Average Donation
- Average Donation From Individuals
- Average Donation From Organizations
- Donors who Increased their donation
- Individual Donors who Increased their donation
- Organization Donors who Increased their donation
- Active Pledges
- Active Recurring Contributions
- Sustaining Members
- Largest Donation
- Largest Donation From Individuals
- Largest Donation From Organizations
- Smallest Donation
- Smallest Donation From Individuals
- Smallest Donation From Organizations
- New Contacts in Database
- New Individuals in Database
- New Organizations in Database

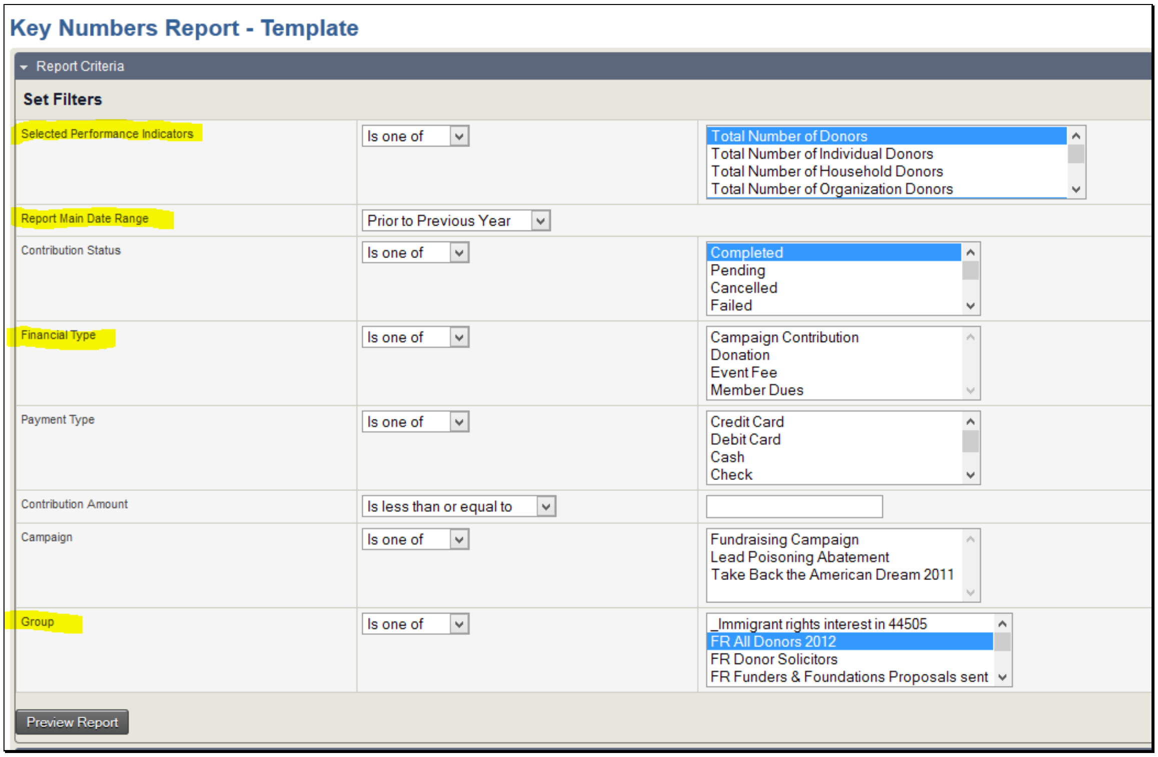
Preparing to Run the Report

The **PowerBase Key Numbers Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

Key Numbers Report

This is an easy report to create, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

Setting Filters



The important parameters to set with filters are the performance indicators, the time frame, and the financial types to be included in the report.

Performance Indicators are set of numbers that mostly analyze fundraising information, with one exception – the change in count of contacts in PowerBase. Most can be broken out by Individual, Organization and Household (if it's in use).

The time frame is usually comparing year-to-date again last-year-to-date, but any time period can be selected.

Financial types filtering allows you to exclude merchandise, event fees or other unrelated income from the totals.

Of the remaining filters, the group filter is especially useful for selecting a subset of donors or members in your PowerBase. In this way you can have a report that specifically covers how the individual donor campaign is proceeding, for instance.

The change in count in the database is not affected by filtering for a group or financial type.

Key Numbers Report

Note: You select additional parameters or deselect a parameter by using the Ctrl key and clicking on the item.

Preview Report

Click on Preview Report to bring the results up.

Create Report

Print Preview | Preview PDF | Preview CSV

Selected Performance Indicators	Is one of Total Number of Donors, Amount Raised, Amount Raised From Individuals, Average Donation From Individuals, Individual Donors who Increased their donation, Sustaining Members, New Contacts in Database
Report Main Date Range	Between January 1, 2011 and December 31, 2011
Contribution Status	Is Completed
Group	Is FR All Donors 2012

	Main Date Range	Percent Change	One year Prior Range
Total Number of Donors	444	1%	440
Amount Raised	$ 105,297.00	8%	$ 97,100.00
Amount Raised From Individuals	$ 105,297.00	8%	$ 97,100.00
Average Donation From Individuals	$ 237.00	7%	$ 221.00
Individual Donors who Increased their donation	378	57%	241
Sustaining Members	0	0%	0
New Contacts in Database	446	n/a	0

You can drill down by clicking on the numbers in blue. This will bring up the Donor Behaviour Detail Report showing the supporting details. The Donor Behaviour Detail Report is described in a separate document.

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

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Configure Your Dashboard

Key Numbers Report for Major Donors

	Main Date Range	Percent Change	One year Prior Range
Total Number of Donors	444	1%	440
Amount Raised	$ 105,297.00	8%	$ 97,100.00
Amount Raised From Individuals	$ 105,297.00	8%	$ 97,100.00
Average Donation From Individuals	$ 237.00	7%	$ 221.00
Individual Donors who Increased their donation	378	57%	241
Sustaining Members	0	0%	0
New Contacts in Database	446	n/a	0

This is how the report appears on the Home page Dashboard.

Contribution Renewals Report

Introduction

The **Contribution Renewals Report** is designed to give you a quick look at the number and rate of renewed donors for multiple time periods. Organizations strive to have a healthy renewal rate. A suggested target renewal rate is 66 percent of the donors each year. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can changed. The duration of time to include a donation as a renewal defaults to 12 months, but it can be changed. Some groups consider a renewal any amount that comes in within 18 months after the latest contribution. Results can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

Preparing to Run the Report

The **Contribution Renewals Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

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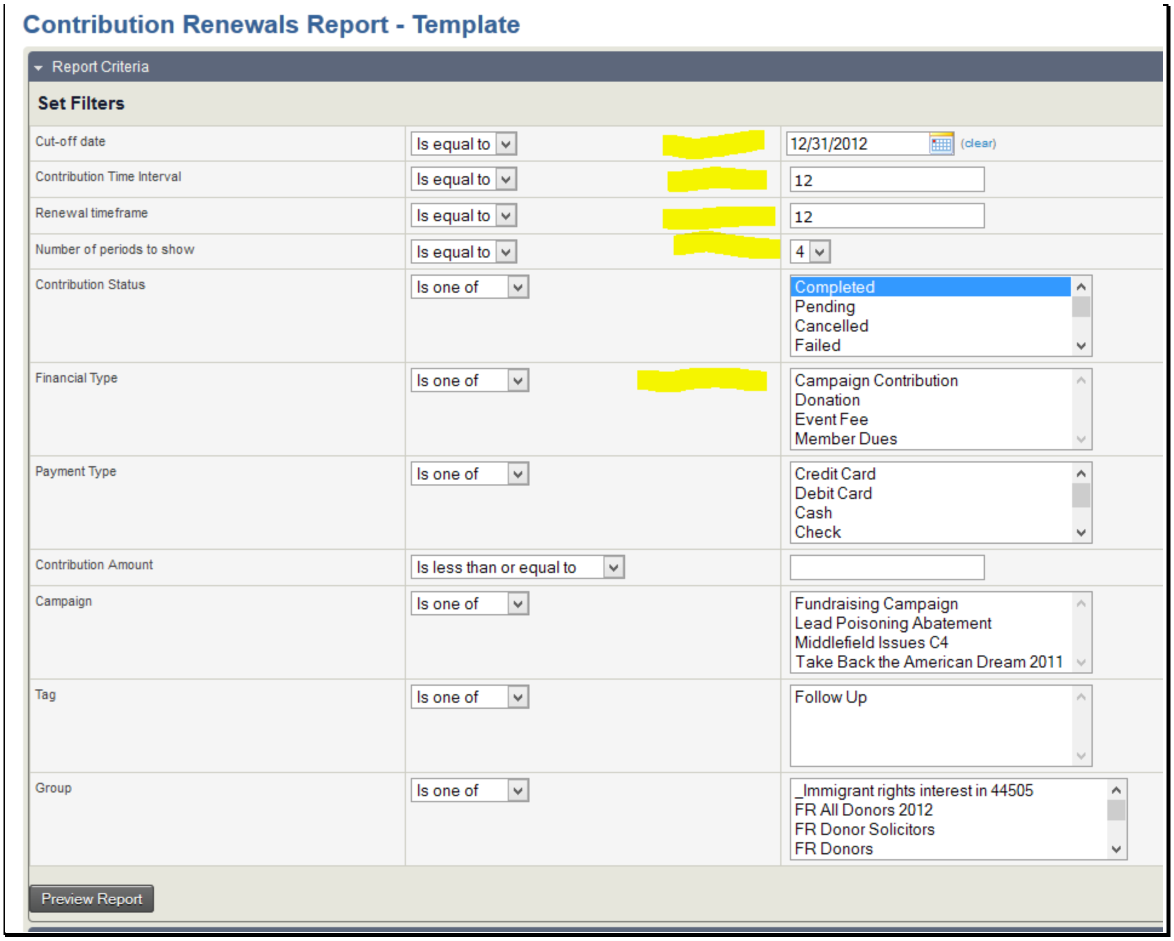
Contribution Renewals Report

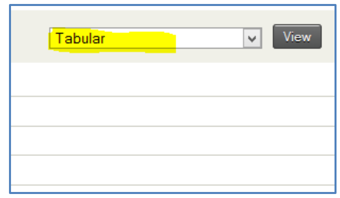
Setting Filters



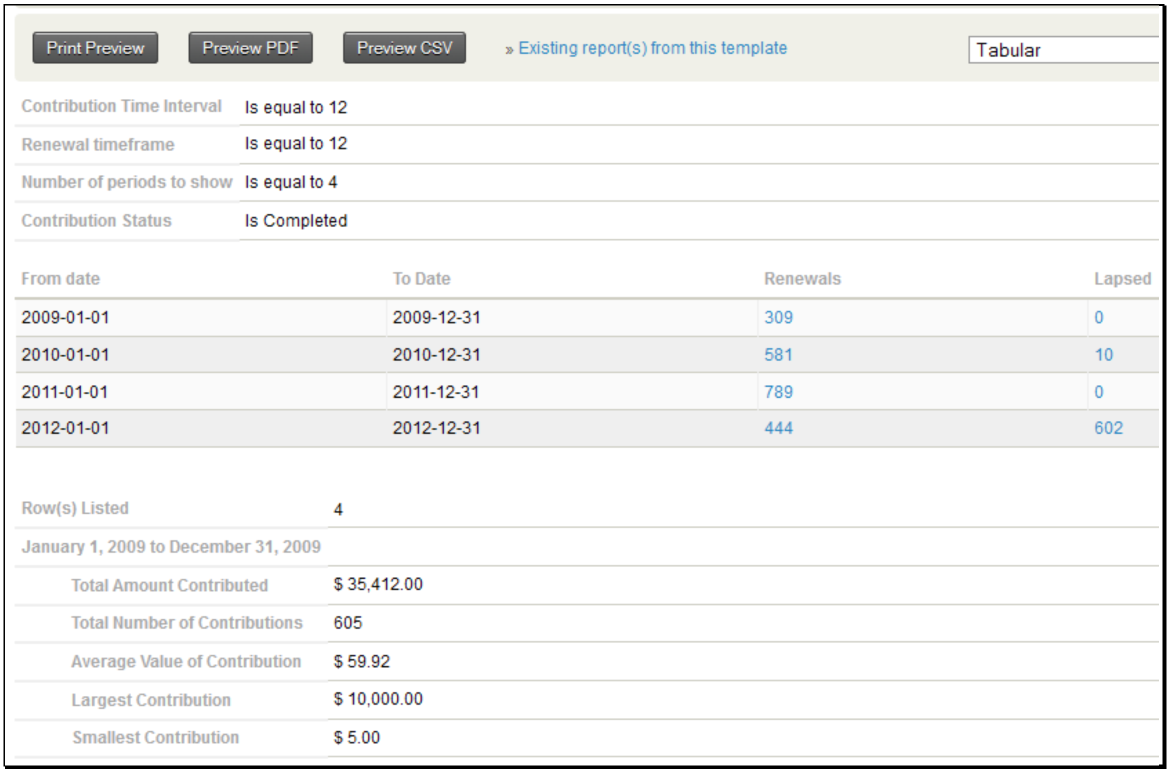
Filter Setting	Description
Cut-off date	This is date is the date of the last interval included in the report. Defaults to the end of the prior year.
Contribution Time Interval	The Interval of reporting cutoff dates. 12 months will show results every year.
Renewal timeframe	Length of time following an initial donation in which another donation must be made to be considered a renewal
Number of periods to show	Number of intervals where a counts and rates will be captured
Contribution Status	Defaults to "Completed". No need to change this in most situations.
Financial Type	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.
Payment Type	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
Contribution Amount	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply.
Campaign	Defaults to all Campaigns
Tag	Defaults to all Tags, if none is selected
Group	Defaults to every contact, if no group is selected.

Contribution Renewals Report

Preview Report



Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.



Contribution Time Interval	Is equal to 12
Renewal timeframe	Is equal to 12
Number of periods to show	Is equal to 4
Contribution Status	Is Completed

From date	To Date	Renewals	Lapsed
2009-01-01	2009-12-31	309	0
2010-01-01	2010-12-31	581	10
2011-01-01	2011-12-31	789	0
2012-01-01	2012-12-31	444	602

Row(s) Listed	4
January 1, 2009 to December 31, 2009	
Total Amount Contributed	$ 35,412.00
Total Number of Contributions	605
Average Value of Contribution	$ 59.92
Largest Contribution	$ 10,000.00
Smallest Contribution	$ 5.00

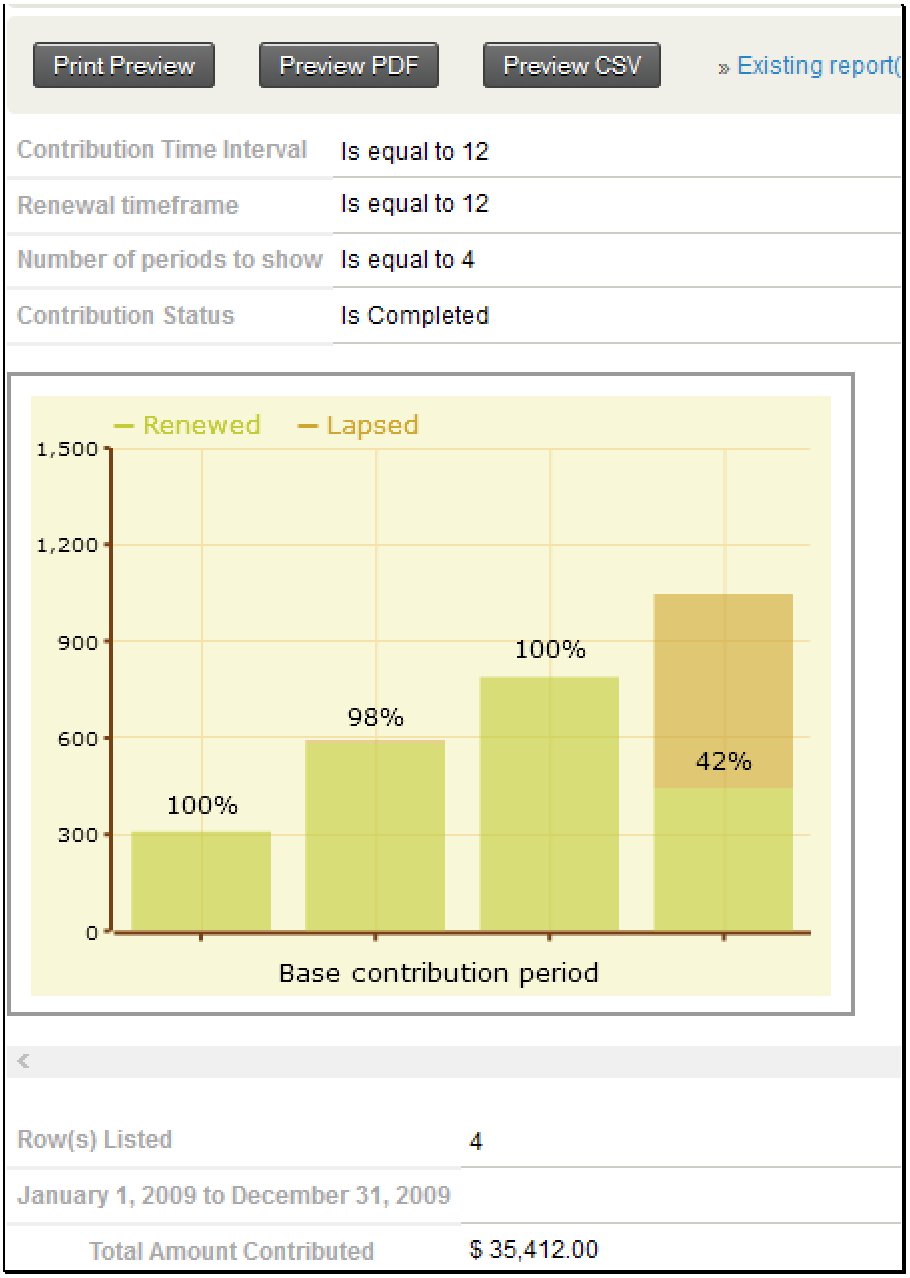
You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

Bar Chart

To change it to a Bar Chart Report, change the View field from "Tabular" to "Bar Chart" and click View.

The result will be something like this next screenshot.

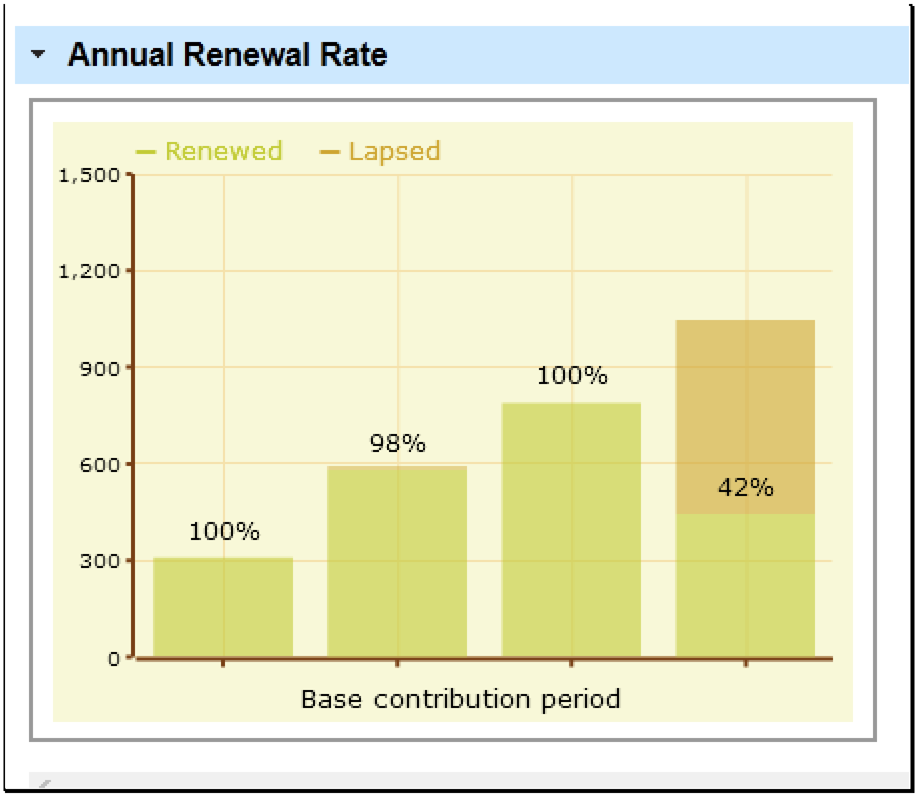
Contribution Renewals Report



Dashboard
One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.

Contribution Renewals Report



Contributor Recovery Report

Introduction

The **Contributor Recovery Report** is designed to give you a quick look at the number and rate of recovered donors in two time periods. Lapsed donors are a potential source of new donations and recovering them as current donors is a measure of the success of fundraising effort. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can changed. The duration of time to include a donation as a recovered defaults to 12 months, but it can be changed. Not all historical donations need to be included in the calculation: by default this is limited to 60 months. Results can be displayed as a list, a bar chart or as two pie charts. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

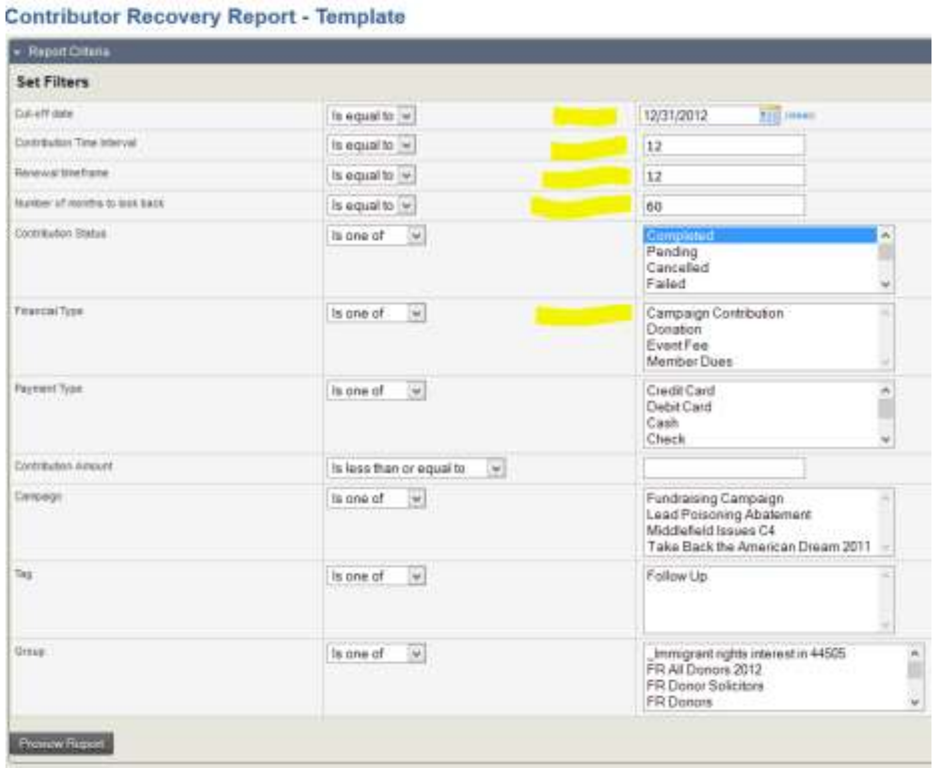
Preparing to Run the Report

The **Contributor Recovery Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results – but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

Setting Filters

Contributor Recovery Report

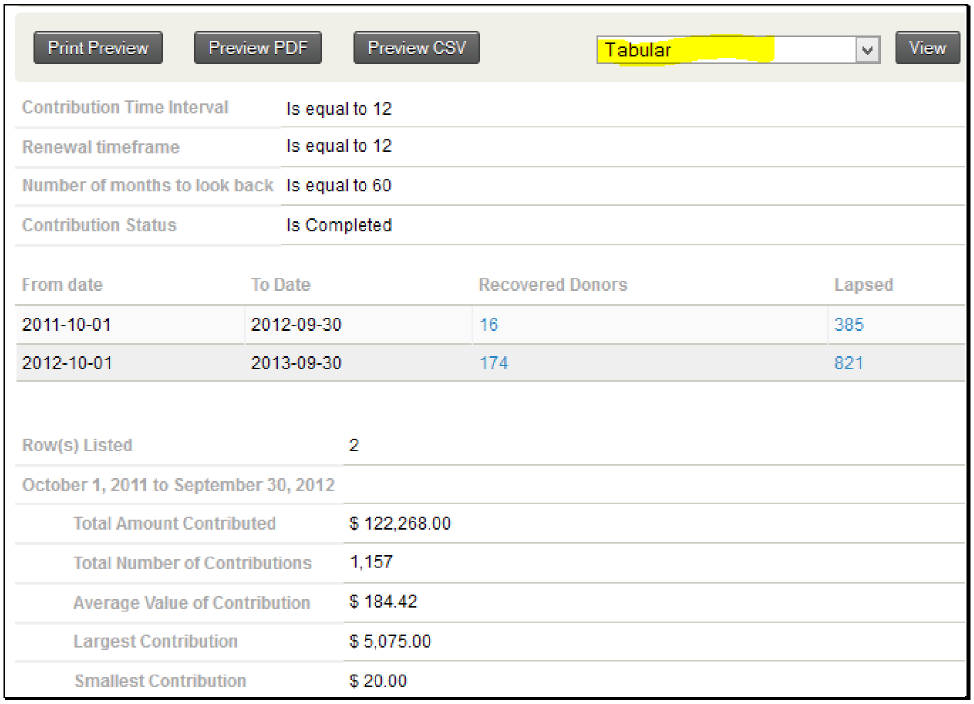


Filter Setting	Description
Cut-off date	This is date is the date of the last interval included in the report. Defaults to the end of the prior year.
Contribution Time Interval	The Interval of reporting cutoff dates. 12 months will show results every year.
Renewal timeframe	Period during which another donation must be made to be considered a renewal. If a donor has made a prior contribution and this period of time expires afterwards without another donation, the donor is considered to be lapsed. Donors who subsequently make a donation after this length of time are classified as Recovered Donors.
Number of months to look back	Limits the period of time that will be included in the calculation. Use it to tell the software to only include relatively recent donations. If too much time has passed since a donor contributed, it's probably better to think of them as a new donor. This should be set to your organization's standard. For example, some organizations only try to recover lapsed donors who gave in the last three years.
Contribution Status	Defaults to "Completed". No need to change this in most situations.
Financial Type	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.
Payment Type	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
Contribution Amount	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply.
Campaign	Defaults to all Campaigns
Tag	Defaults to all Tags, if none is selected
Group	Defaults to every contact, if no group is selected.

Contributor Recovery Report

Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.


Print Preview | Preview PDF | Preview CSV | Tabular | View

Contribution Time Interval	Is equal to 12
Renewal timeframe	Is equal to 12
Number of months to look back	Is equal to 60
Contribution Status	Is Completed

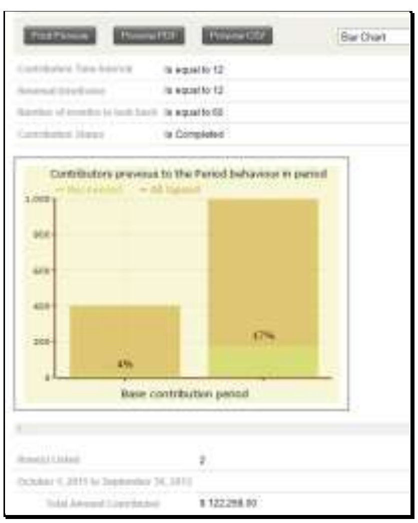
From date	To Date	Recovered Donors	Lapsed
2011-10-01	2012-09-30	16	385
2012-10-01	2013-09-30	174	821

Row(s) Listed	2
October 1, 2011 to September 30, 2012	
Total Amount Contributed	$ 122,268.00
Total Number of Contributions	1,157
Average Value of Contribution	$ 184.42
Largest Contribution	$ 5,075.00
Smallest Contribution	$ 20.00

You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

Bar Chart

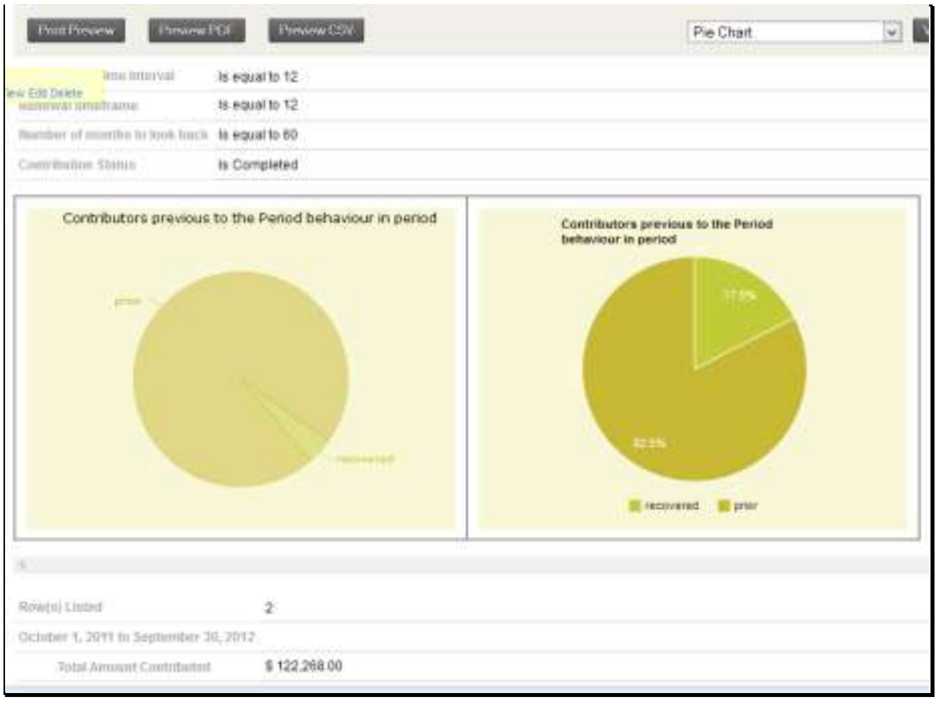
To change it to a Bar Chart Report, change the View field from "Tabular" to "Bar Chart" and click View. The result will be something like this next screenshot.



Contributor Recovery Report

Pie Charts

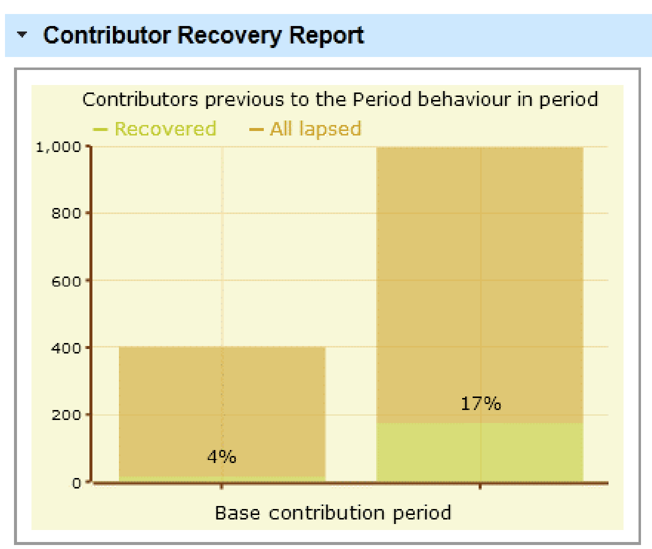
To change it to a Pie Chart Report, change the View field "Pie Chart" and click View. The result will be something like this next screenshot.



Dashboard

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.



New Contributor Report

Introduction

The **New Contributor Report** is designed to give you a quick look at the number of new donors for multiple time periods. It gives you a count of the new donors for the time periods you select. Time period length defaults to quarters, but can be annual, semi-annual or monthly as well. It can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

Preparing to Run the Report

The **New Contributor Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

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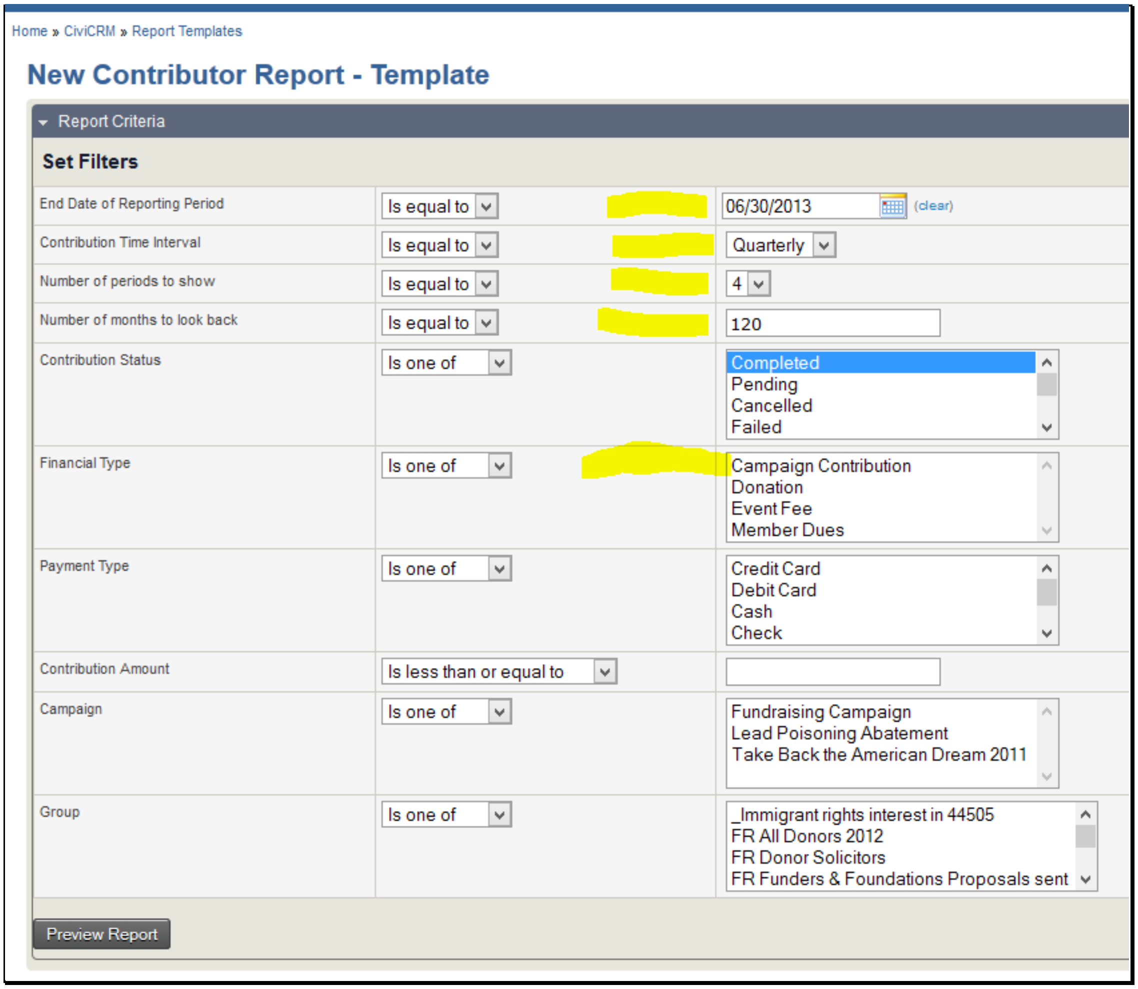
New Contributor Report

Setting Filters



Filter Setting	Description
End Date of Reporting Period	Defaults to the end of the last quarter, but it can be changed
Contribution Time Interval	Defaults to Quarterly, but can be Monthly, 6 Months, or Annual
Number of periods to show	Defaults to 4, but can be changed. You might select 5 to see results of the same quarter last year, for instance.
Number of months to look back	Defaults to 120 which is 10 years. The "look back" period excludes the donors who gave more than once during this period. If you consider a new donor to be someone who hasn't given in 5 years, you would change this to 60 months.
Contribution Status	Defaults to "Completed". No need to change this in most situations.
Financial Type	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.

New Contributor Report

Payment Type	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
Contribution Amount	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply. Keep in mind that a new donor may be someone who gave one or more donations at some point which did not meet the criteria that you select.
Campaign	Defaults to all Campaigns
Group	Defaults to every contact If no group is selected.

Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.

Print Preview | Preview PDF | Preview CSV

Contribution Time Interval	Is equal to Yearly
Number of periods to show	Is equal to 4
Number of months to look back	Is equal to 120
Contribution Status	Is Completed

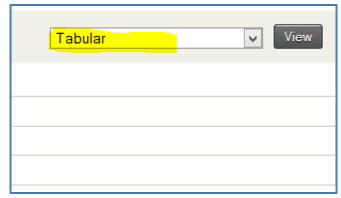
From date	To Date	New Donors
2008-07-01	2009-06-30	28
2009-07-01	2010-06-30	48
2010-07-01	2011-06-30	444
2011-07-01	2012-06-30	10

Row(s) Listed	4
July 1, 2008 to June 30, 2009	
Total Amount Contributed	$ 20,290.00
Total Number of Contributions	271
Average Value of Contribution	$ 74.87
Largest Contribution	$ 10,000.00
Smallest Contribution	$ 1.00
July 1, 2009 to June 30, 2010	
Total Amount Contributed	$ 30,209.00
Total Number of Contributions	636
Average Value of Contribution	$ 51.03
Largest Contribution	$ 3,000.00
Smallest Contribution	$ 5.00

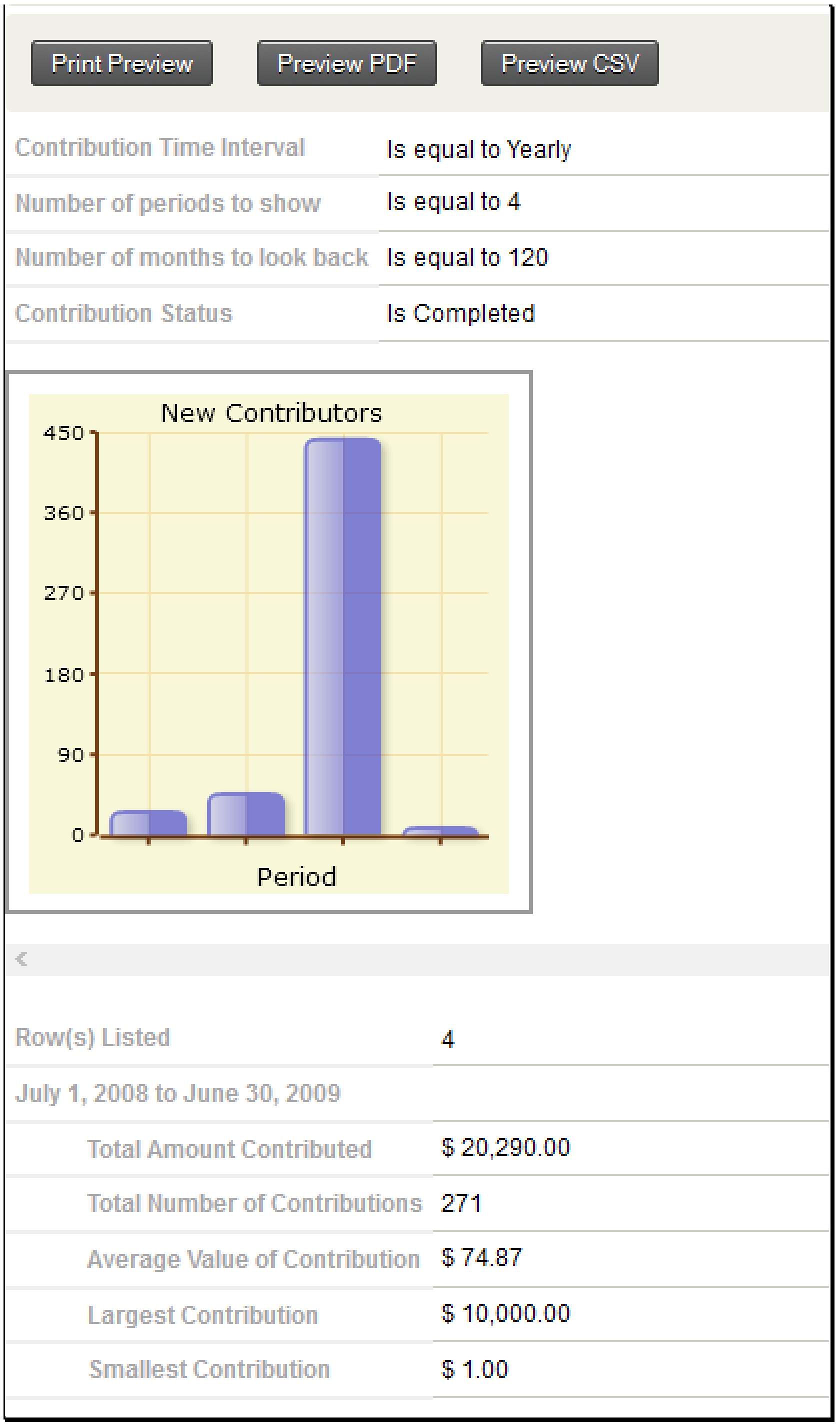
You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

New Contributor Report

Bar Chart
To change it to a Bar Chart Report, change the View field from “Tabular” to “Bar Chart” and click View.



The result will be something like this next screenshot.

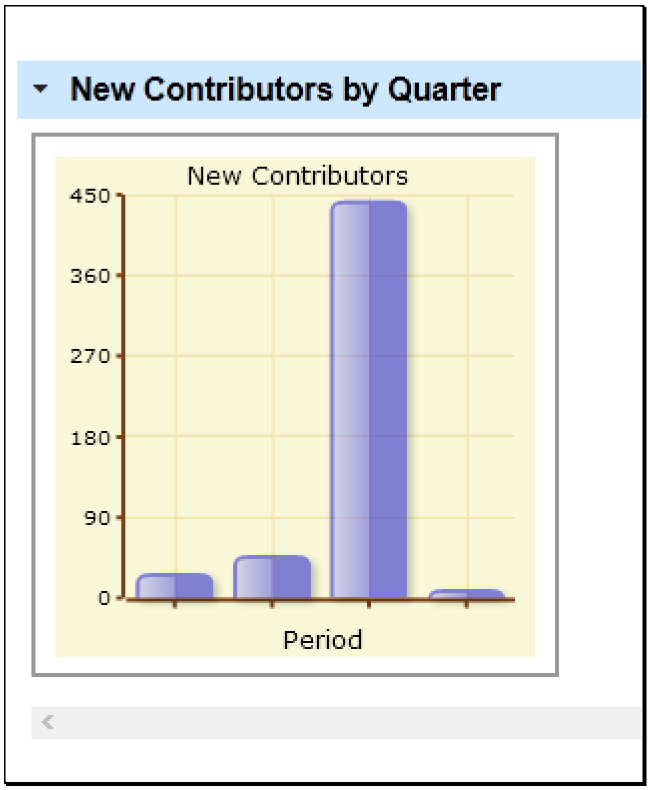


New Contributor Report

Dashboard

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.



The Basics of Creating Reports

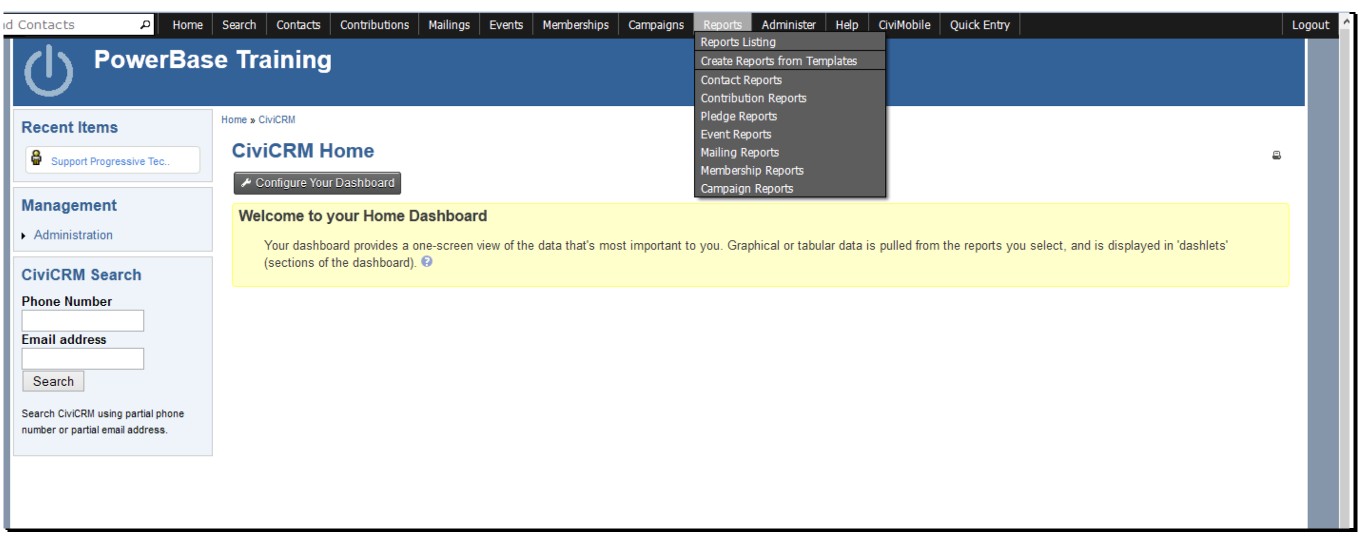
This document gives a general description of the process for creating reports. It describes the features that are common to most reports. The idea is that by reading this you'll have enough information on how reports work to create any report in PowerBase. Of course the details of what you can display, sort by, filter by will depend on the report in question

Reports are created from Report Templates and then they are saved as a Report that can be retrieved from the Reports list (or elsewhere – more details on that to follow) and run. Alternatively, you can create a new report by selecting an existing report, modifying its criteria and save it as a new report.

Once a Report is created, it will automatically be available for others to run from the appropriate category on the Reports menu. As you create it, you can make it available for the Home page Dashboard, allowing anyone with the appropriate permissions to customize their dashboard by dragging it from the gallery of "dashlets". You can also put it directly on a PowerBase Menu when it's created. For example, a contribution report might be more visible on the Contributions Menu than it would be in the Reports>Contributions Reports menu.

Reports Menu

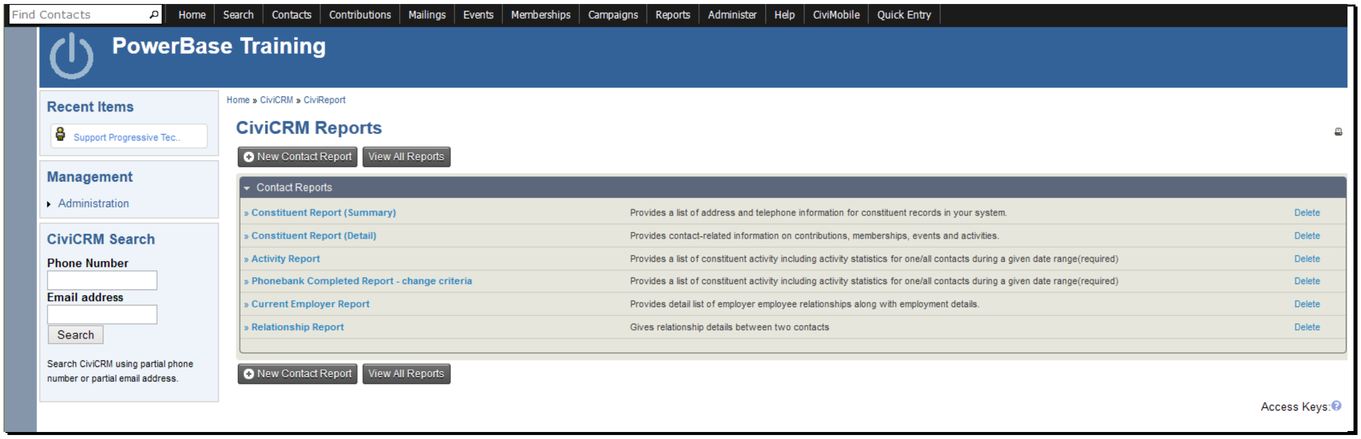
Report creating and using are accessed from the Reports Menu. On the menu, you have the choices of seeing all the Reports that have been created (Reports Listing) and then picking one to run or you can create a new Report (Create Reports from Templates). If you prefer, you can zero in on a category of Reports and do the same operations of using an existing Report or creating a new one from a template.



Reports are segmented by the data that they pull together. In almost all reports, you have access to some Contact information. Others will have Contribution, Membership, Event Participation, Pledge, or Mailings details.

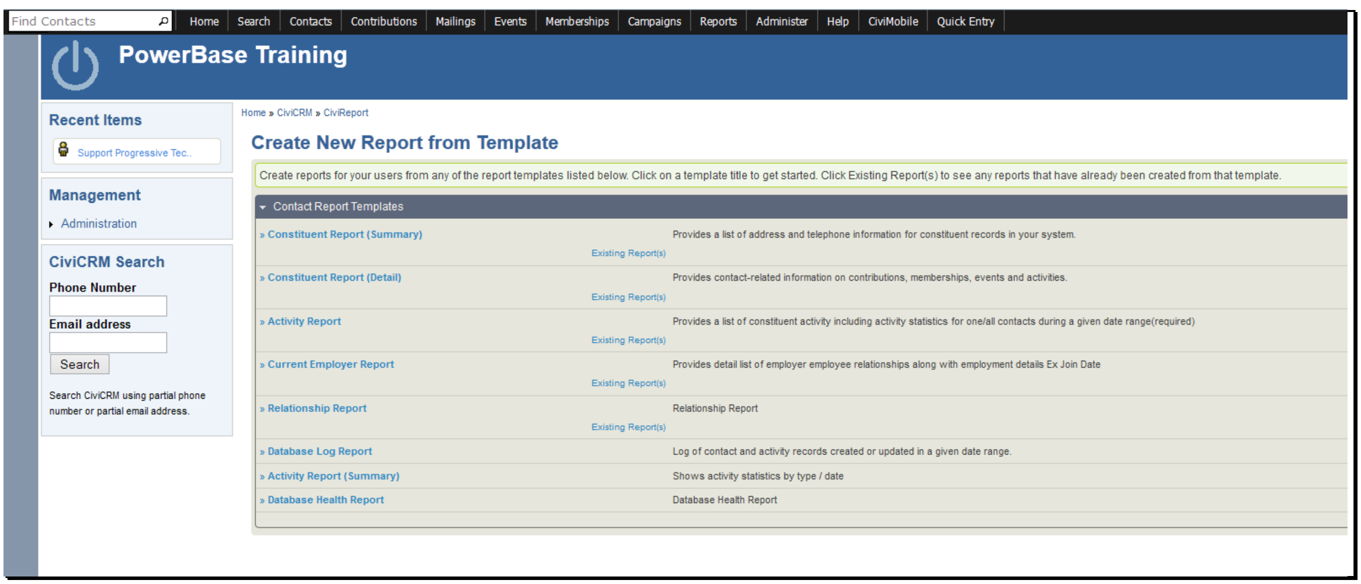
The Basics of Creating Reports

Once you select a category, you'll get to a screen like the one below. It lists all the Reports that have already been created in that category. You can run them by clicking on the name. You can delete the report by selecting the delete option. To create a new Report, click on the button "New Contact Report". Each category will have a different type of New Report. In the screenshot, we are in the Contact reports, so the New button goes to Contact Report templates.



Working from a Report Template

Selecting the New Contact Report button brings you to this screen. From here, clicking on the name starts a ***new*** Report with default options. Clicking on "Existing Reports" will pull up a list of all the reports created from the template.



There are two major sections in each Report:

1. **Report Criteria** and

The Basics of Creating Reports

2. **Create Report**

Initially, however, all you see is **Report Criteria** and its multiple sections, each with multiple options. Report Criteria always has these two sections in it:

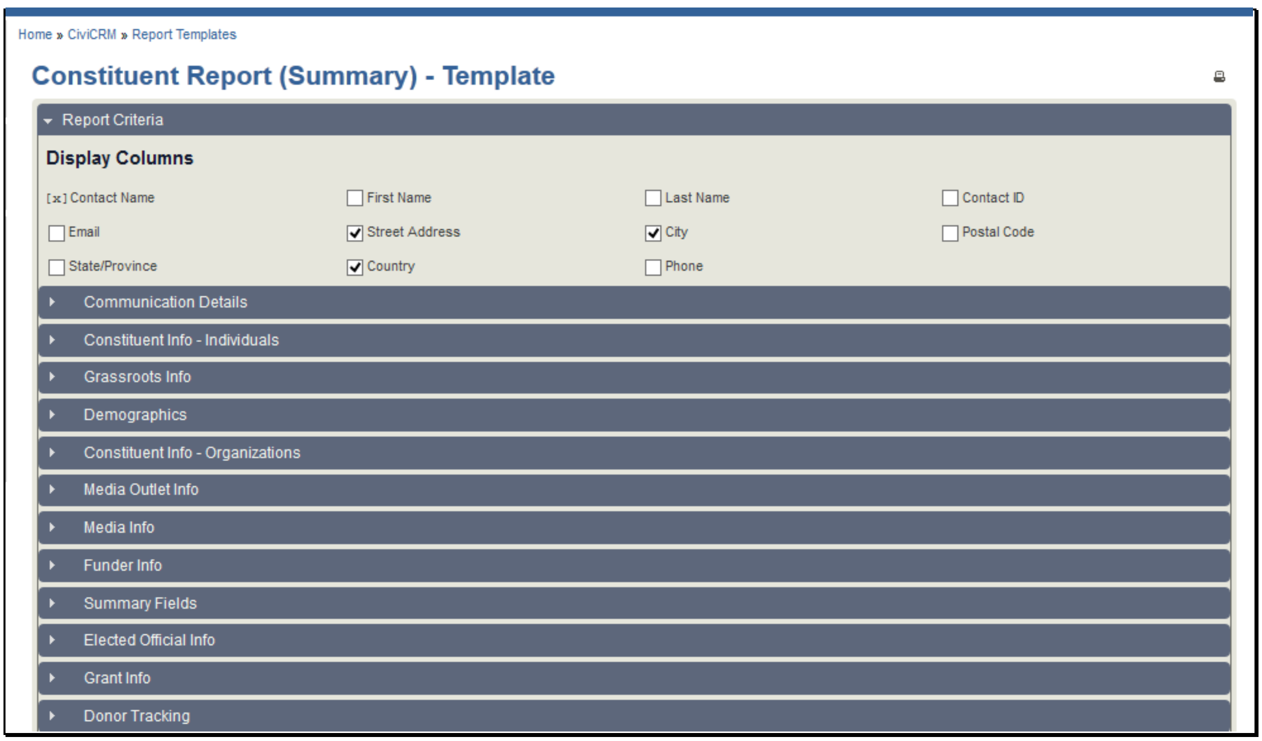
1. **Display Columns** which controls which fields appear on the Report
2. **Set Filters** which limits the data that will be selected to include in the Report.

In addition, there are some others that often appear in Report Criteria:

1. **Order by Columns** which controls what the sequence of the Report is.
2. **Group by Columns** which allows you to summarize data, such as contributions by person.

Setting up Report Criteria

We will create a Constituent Report (Summary) as an example of creating a report from a template. If you click on Constituent Report (Summary), you'll come to the next screen.



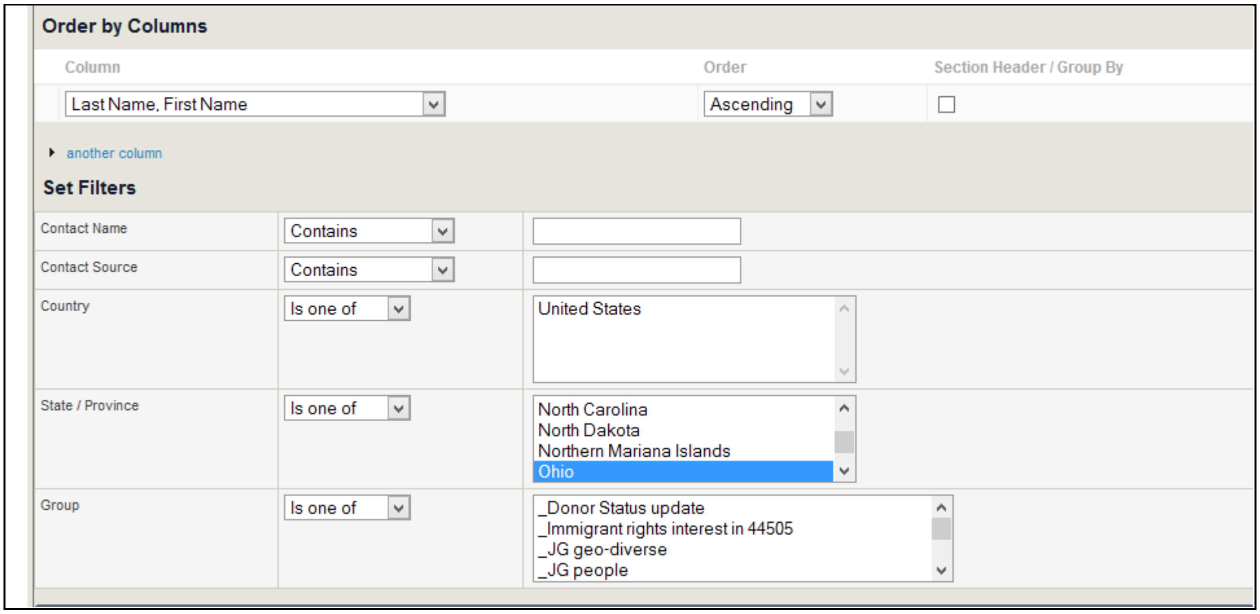
Display Columns

In this section you select or unselect the fields for the Report. Each of the dark grey rows with a triangle at the left are sets of fields that can be added to the report. Click on the triangle exposes the fields. Select from them as desired.

The Basics of Creating Reports

Setting Up Order By Columns

If this section is there, you can modify the sequencing of the report. Select you preferred sequence. The **Section Header / Group By** options will group your results by the criteria in the **Column** field.



Set Filters

This is a very important section. It controls which data will appear in your report. If nothing is selected, then all data will be included. PowerBase usually defaults to preloading your State as a criteria. Unless you are absolutely sure all records have a complete address, you should deselect it by holding down the Ctrl or Apple key and pressing Enter. If you don't do this, people without a complete address will be filtered out of the group.

There can be many types of data included on the filters section, so it's important to think through how the different criteria interact with each other. If you find that you are not getting records that you know should be included in the report, remove criteria and preview the report again.

Preview Report

Once you've configured the Report, you are ready to **Preview the Report**, which simply means, "Run the Report and show me the results on the screen".

Along with viewing the report on the screen, the Preview mode gives you these options:

- create a version that's suitable for printing (**Print Preview)**,
- create a PDF version (**Preview PDF**),
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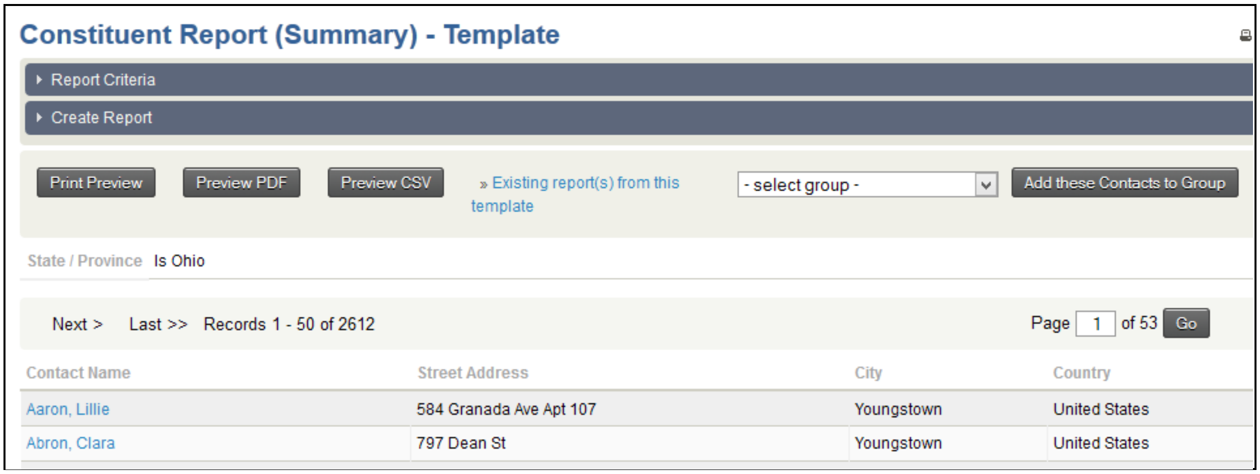
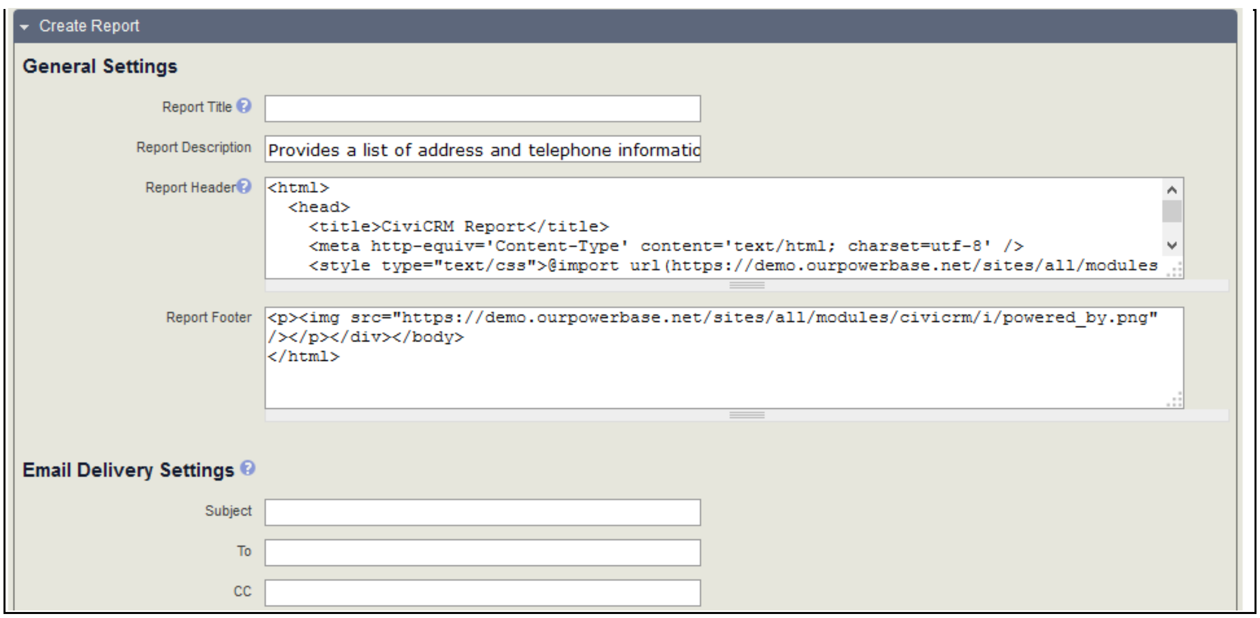
- add the contacts listed to a group for further work (**Add these Contacts to Group**). The group must be created before adding them to it.

The Basics of Creating Reports



If the report isn’t to your liking, it’s a simple matter to change it. Click on the **Report Criteria** row to reopen the settings and change them as needed. You can rerun this as many times as you need until you have it the way you want it. If all you’re interested in doing is finding results one time only, then you are done. If you want to save the report to run it again later, you’ll need to go into the **Create Report** section.

Create Report

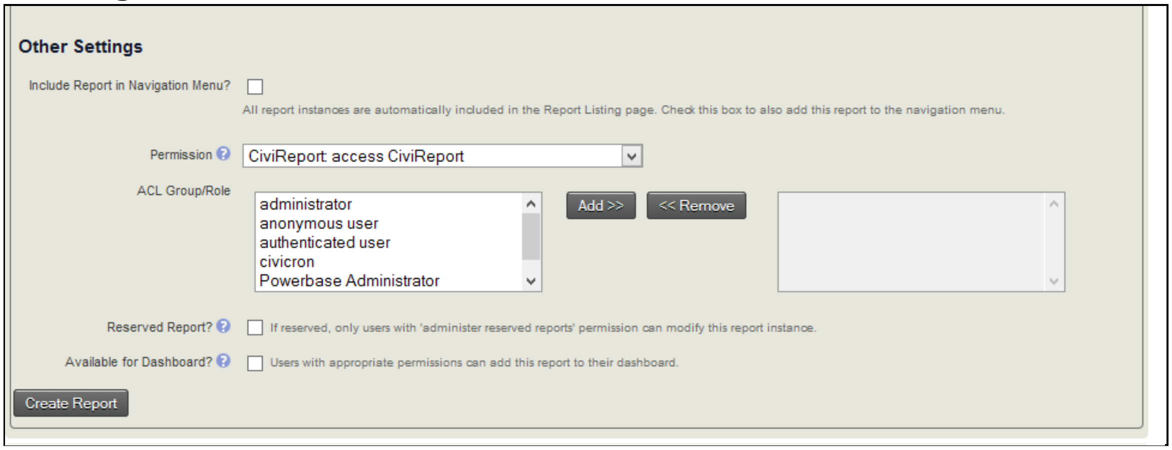


General Settings

Selecting the **Create Report** option exposes more options for you to configure. To save a Report for re-use, you’ll need to fill in the **Report Title.** You can edit the **Report Description** to inform others of what you intended the report for. If it’s destined for a printer someday, you should edit the **Report Header** and replace the “CiviCRM Report” phrase with the Report Title.

The Basics of Creating Reports

Other Settings



Include Report in Navigation Menu? Check this option if you want to add it to a different menu then the Reports menu where it will automatically appear. You'll get a list of all the Navigation menu items. Pick the heading that corresponds to the menu that you want it to appear on.

Permission You can set up a report so that it is only available for some users.

Reserved Report? Keeps folks without the authority from changing your report into something else.

Available for Dashboard? Check this option so that people can add it to their Home page Dashboard. Doing so will show it among the available dashlets that people can drag to their Home page Dashboard.

Contribution Report Templates	Description	Best Use
» Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	Tracking
» Donor Report (Detail)	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.	Evaluating Donors
» Donation Summary Report (Repeat)	Given two date ranges, shows contacts (and their contributions) who contributed in both the date ranges with percentage increase / decrease.	Tracking to see who has not yet contributed and for Evaluating Donors
» Donation Summary Report (Organization)	Displays a detailed contribution report for Organization relationships with contributors, as to if contribution done was from an employee of some organization or from that Organization itself.	Tracking Matching Donations
» Donation Summary Report (Household)	Provides a detailed report for Contributions made by contributors (Or Household itself) who are having a relationship with household (For ex a Contributor is Head of Household for some household or is a member of.)	Generally not used by PowerBase users
» Top Donors Report	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	Segmenting your Donor Base
» SYBUNT Report	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	Targeting potential donor recovery
» LYBUNT Report	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	Tracking to see who has not yet contributed
» Soft Credit Report	Soft Credit details.	Tracking Donor Solicitors
» Bookkeeping Transactions Report	Shows Bookkeeping Transactions Report	Reconciling Contributions with the Accounting System
» Personal Campaign Page Report	Shows Personal Campaign Page Report	Tracking

Contribution Report Templates	Description	Best Use
» Contribution History By Relationship Report	List contact's donation history, grouped by year, along with contributions attributed to any of the contact's related contacts.	Tracking employee donations
» Donor Behaviour Detail	Report displays details for Renewal & Recovery Reports. This one is called from the Donor Source, Key Numbers Report, New Contributor Report, Contributor Recovery Report and Contribution Renewals Report	Provides detail support for checking Fundraising Management Dashboard
» Donor Source	Report displays whether donations in period are from new, renewed or re-activated givers	Fundraising Management Dashboard
» Key Numbers Report	Report displays Key performance Indicators	Fundraising Management Dashboard
» New Contributor Report	Report displays how many contributors have given for the first time	Fundraising Management Dashboard
» Contributor Recovery Report	Report displays how many contributors have lapsed and been recovered	Fundraising Management Dashboard
» Contribution Renewals Report	Report displays how many contributors have continued to contribute	Fundraising Management Dashboard

Identifying and Assessing Potential Donors

Useful Information	PowerBase	What do WE need?
Donors who gave last year but not this year: 1) Number of donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	LYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
Lapsed donors to recover: 1) Number of lapsed donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	SYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
This year's donors who could be asked again: 1) Number of current donors 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	Donation Summary Report Advanced Search: Summary Fields Donor Report (Detail) Donation Summary Report (Repeat)	
Mid-level and major donors	Top Donors Report Advanced Search: Summary Fields Contribution History by Relationship Report Contribution Aggregate Custom Search	
Loyal Donors: Donors who have given 2+ (or more) consecutive years	Donation Summary Report (Repeat) Donor Report (Detail) Advanced Search and Search Builder	
Prospect List: Growth in internal prospecting list	Key Numbers Report	
Income, response rate and average gift on any similar past campaign	Mailing Reports for Campaign Activity Search for direct mail Campaign Contribution Search for Campaign Fundraising Dashboard for Campaign	
Prospective Team: Board members, members, and other constituents organized by their contact	Various	

Implementing and Managing the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations, total amount and donor names attributed to each solicitor	Soft Credit Report	
Number of donations and amount attributed to each contribution type	Donor Report (Summary)	
Donations by gift level: Where are your gaps? Where are you strong? Who should get an immediate and personal acknowledgement?	Donor Report (Summary)	
Donors who haven't yet given to the campaign sorted by solicitor	Repeat Contributions Report	

Evaluating the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations and total amount attributed to each solicitor	Soft Credit Report	
Number of donations, amount and gift average attributed to each contribution type: What were the results of fundraising on multiple channels?	Donor Report (Summary)	
Donations by gift level: How did the results match to your original gift chart?	Donation Report (Summary)	
Number and amount of donations by new, renewed or reactivated donors: Have you brought in new donors, are you closer to a 66% renewal rate for the year, and have you pulled lapsed donors back in?	Fundraising Dashboard for Campaign	
Conversion: Did people who gave to you for the first time last year give through this campaign?	Repeat Contributions Report	
Increased donations: How many donors gave more to the organization as a result of the campaign?	Repeat Contributions Report Fundraising Dashboard for Campaign	
Mid and Major Donors: Did your top donors give through this campaign? Anything more you can do?	Fundraising Dashboard for Campaign Repeat Contributions Report	
Loyal Donors: Did this campaign reach your loyal donors? Anything more you can do?	Repeat Contributions Report Fundraising Dashboard for Campaign	

The Basics of Creating Reports

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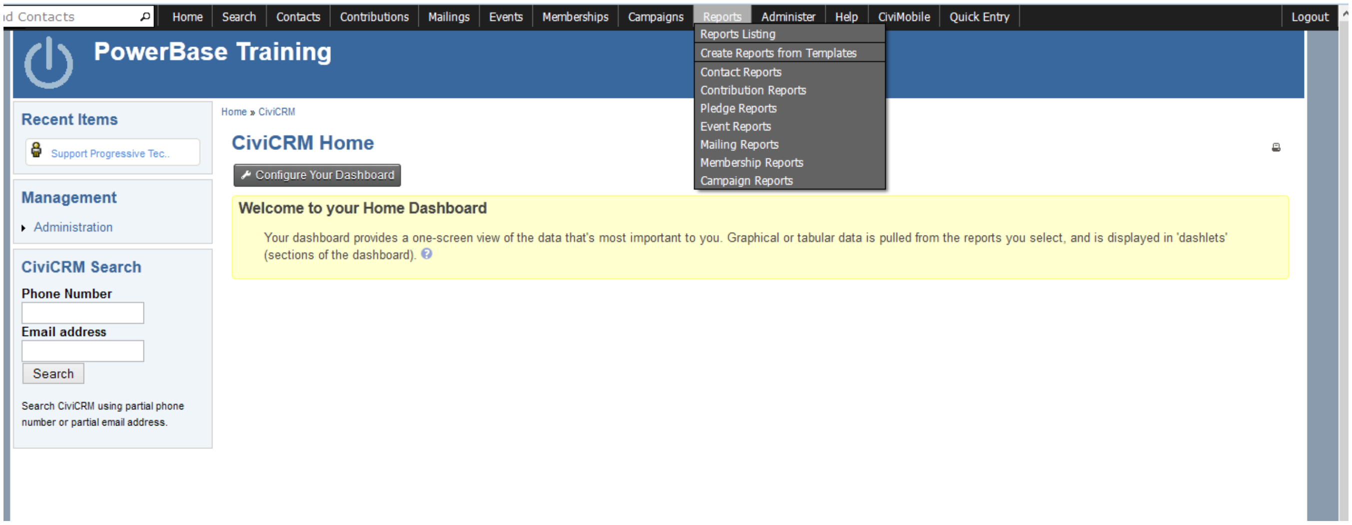

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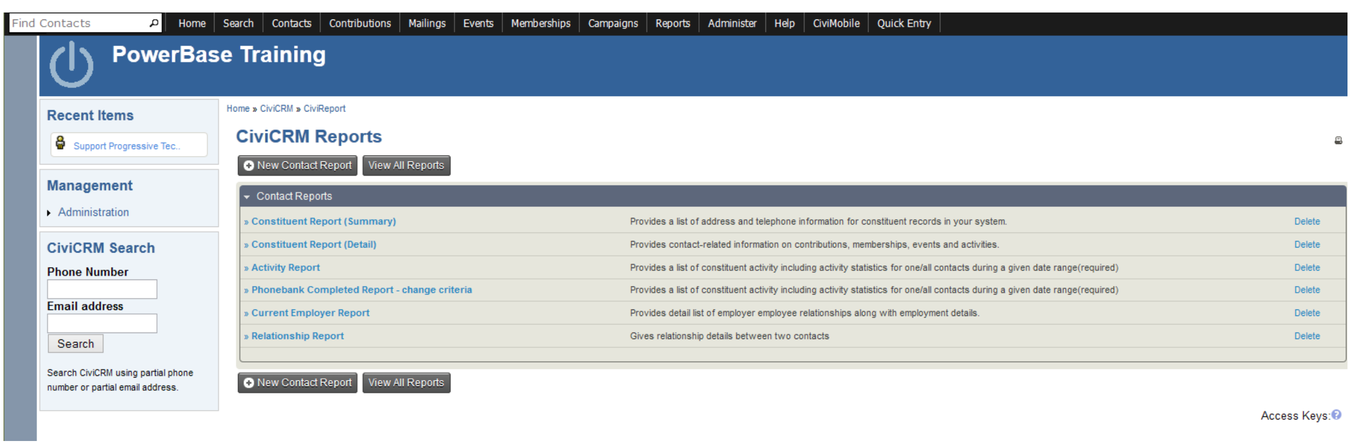

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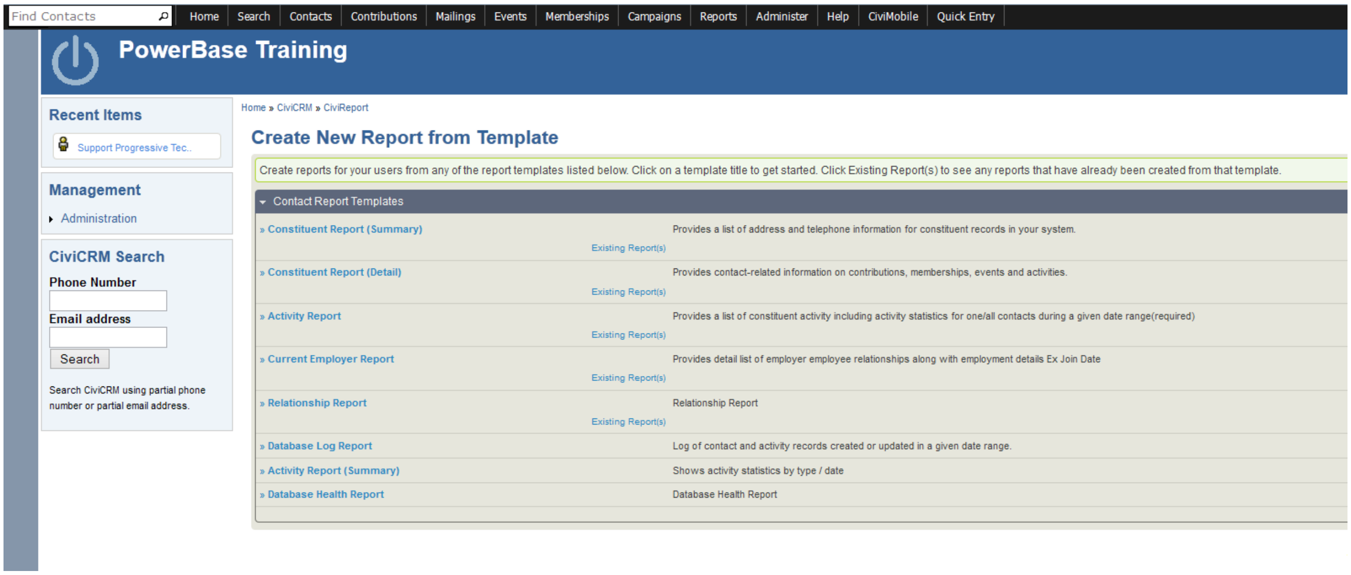

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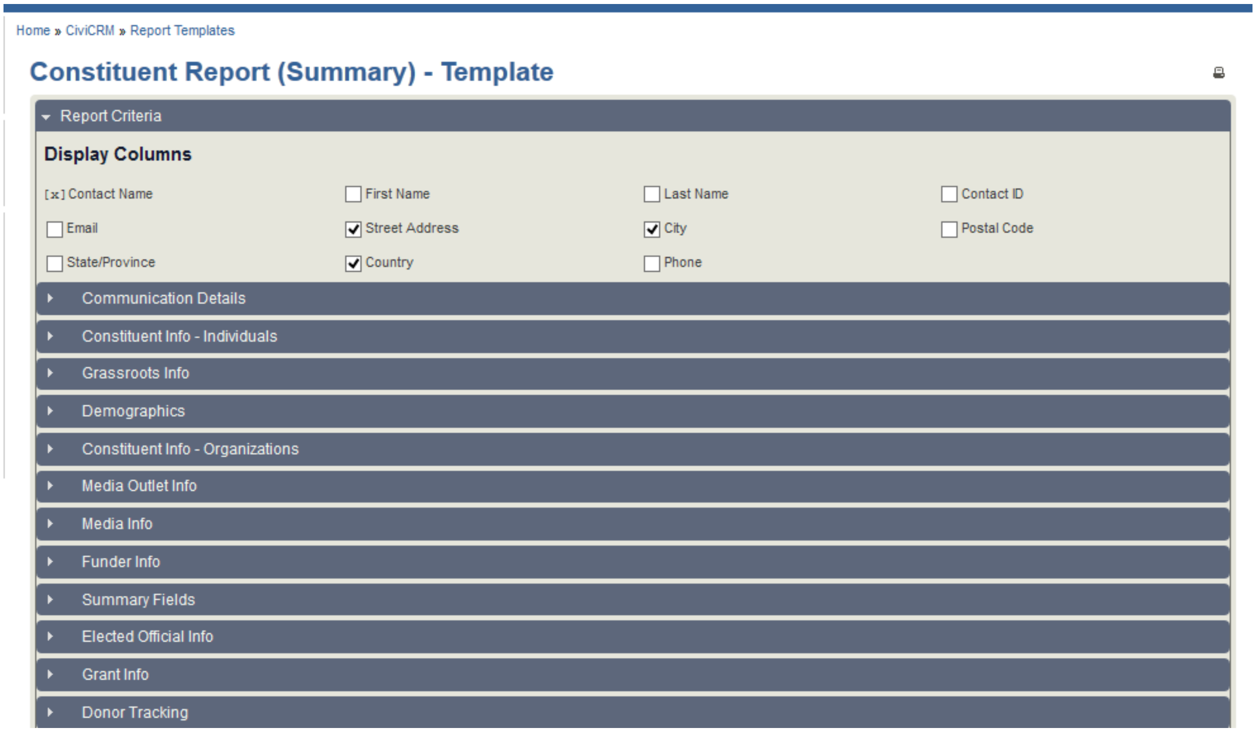

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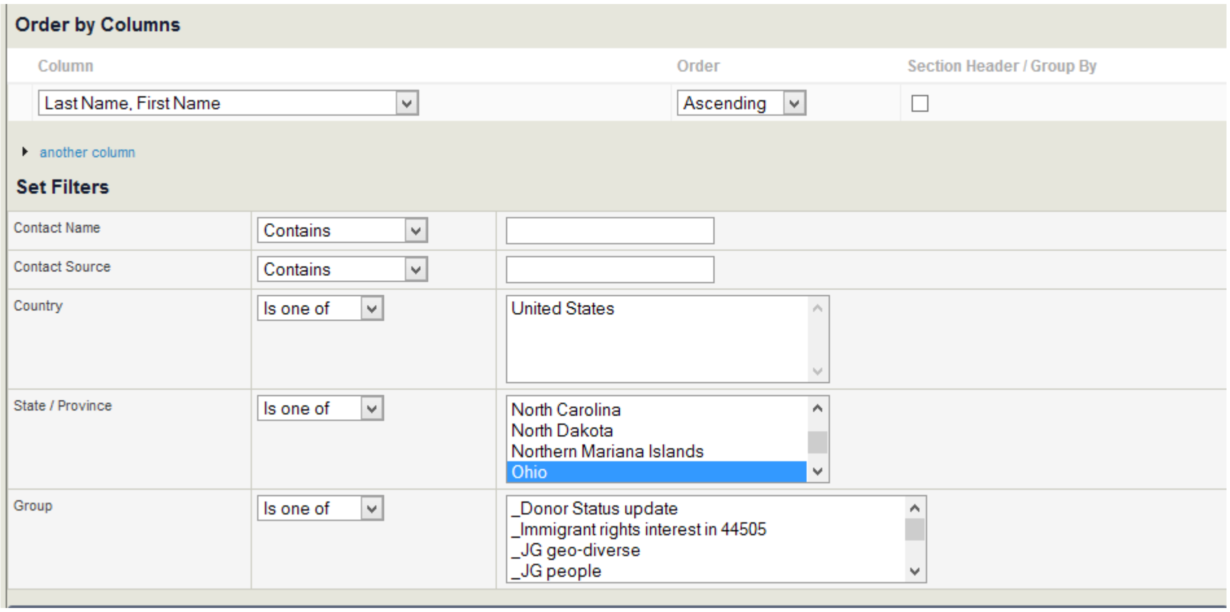

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The Basics of Creating Reports

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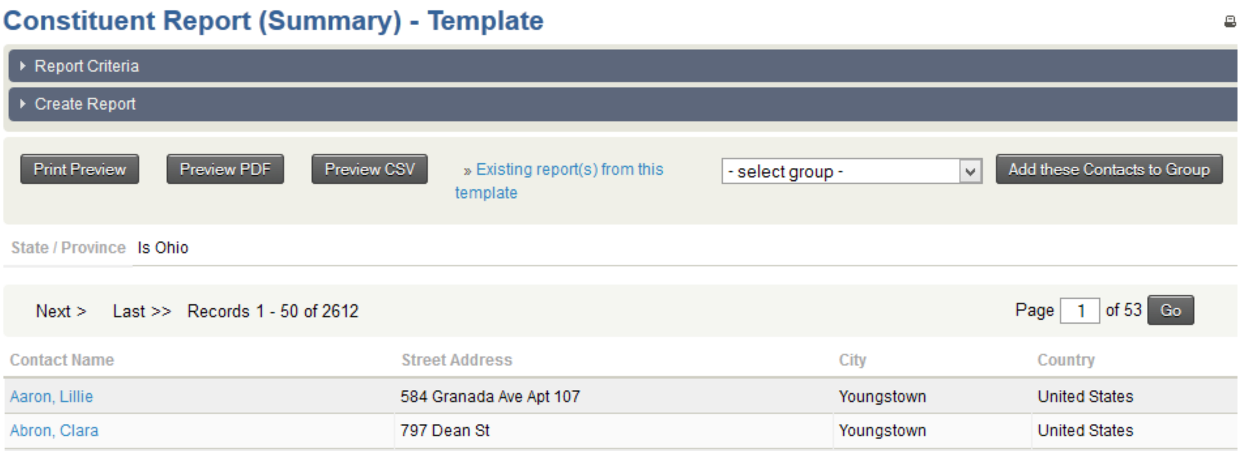

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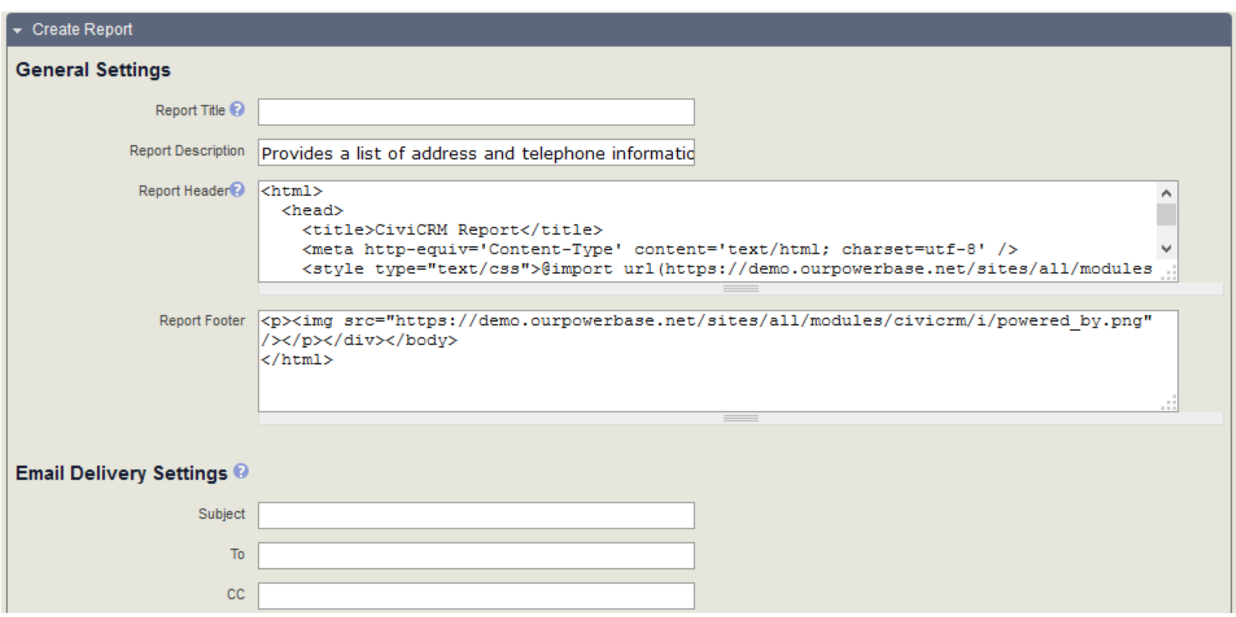
Create Report



The Basics of Creating Reports

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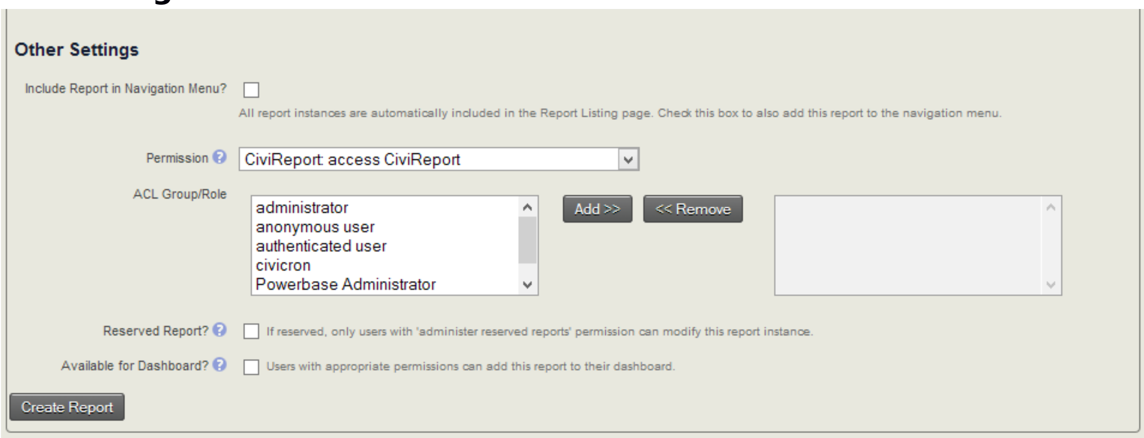

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Reserved Report? Keeps folks without the authority from changing your report into something else.

Available for Dashboard? Check this option so that people can add it to their Home page Dashboard. Doing so will show it among the available dashlets that people can drag to their Home page Dashboard.

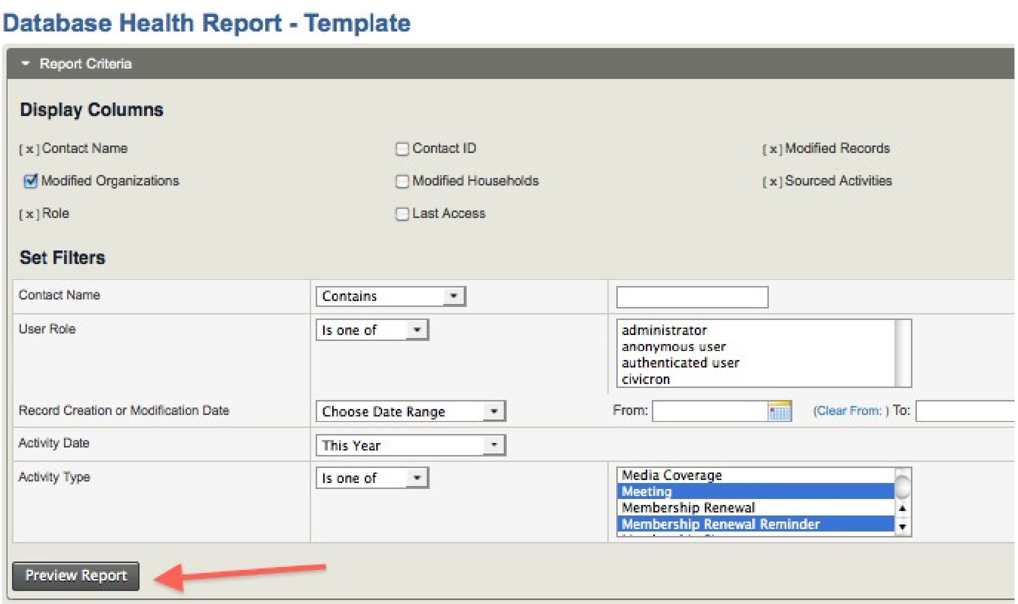
Add a Dashlet to Your Homepage

Is there a report you use (or want to use) often? Make your PowerBase homepage *way* more useful by adding the reports that you need to see right to your PB homepage, also known as the dashboard.

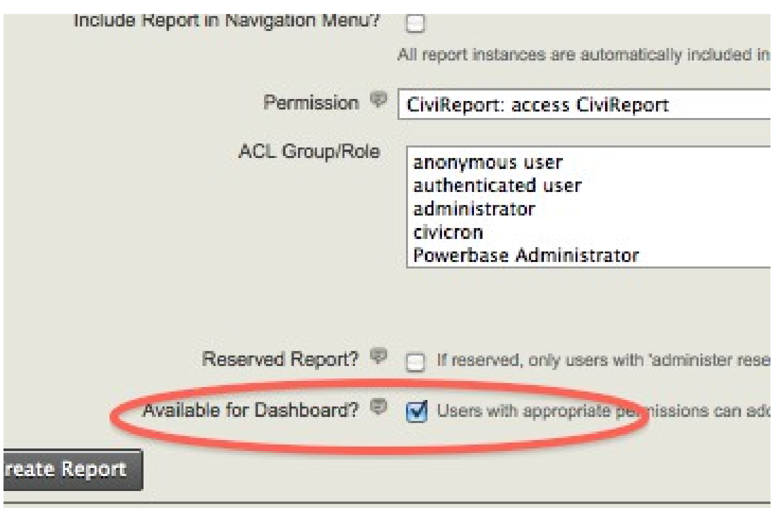
If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

Here are the steps to create a report that can be used as dashlet:

- Click **Reports** > **Create Reports from Templates**
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click **Preview Report**.



- Once there, click **Create Report**.
- At the bottom of the Create Report section, there’s a checkbox that says “**Available for Dashboard?**”



Add a Dashlet to Your Homepage

- Click it, and users with permission to see that information (i.e. if it's about events, users who have permissions to see event-related stuff) will be able to add that dashlet.
- Once you've enabled the dashlet, click **Home**.
- Click **Configure Dashboard**. Drag the dashlet from the "Available Dashlets" box to the column where you'd like it to appear.

Once you can view the report on your dashboard, you will have the latest info at your fingertips. If you suspect any data isn't up to date, just click Refresh Dashboard Data at the top right of the dashboard.

*Don't hesitate to reach out to support if you need help with creating reports at support@progressivetech.org or 612-724-2600 x 114

Read more about the dashboard and dashlets in the manual: http://book.civicrm.org/user/current/the-user-interface/menu-dashboard-and-dashlets/

SYBUNT

This report searches through ALL donors' donations and finds donors who have given at one point, but not in the year specified. The report does not include contacts who have never donated. Typically, one picks the current year to find donors who have not given the current year. Since the report includes ALL donations, organizations with many years' of donation history may want to make a group of donors covering the prior five years, for example, and then use that group as a filter. Therefore the results will show who has donated at some point in the last five years, but not in the year in question.

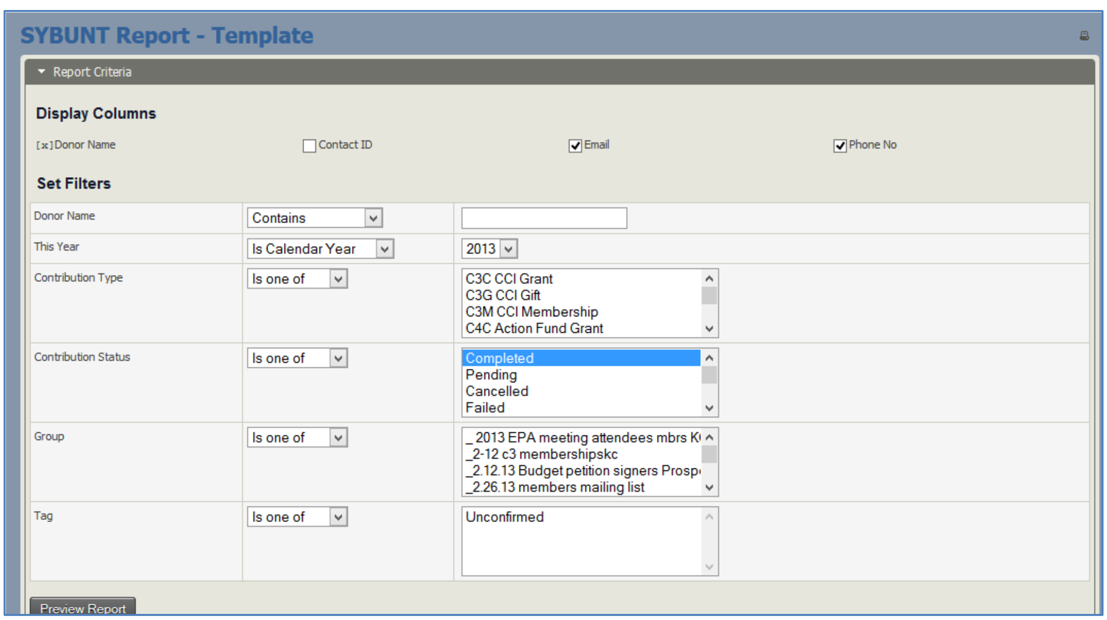
To run this report, enter the year for which you are trying to find folks who have not donated in the "This Year" field. Select whether you are using calendar year or fiscal year. This report uses the fiscal year cutoff as defined in the date settings here: https://SITE.ourpowerbase.net/civicrm/admin/setting/date?reset=1 where SITE is the name of the PowerBase site.

Select the Contribution Types to be considered. If none are selected, all are included.

Select Contribution Statuses to be included. In almost all cases, the default of "Completed" is the best selection.

Select a Group, if desired. If none are selected, all contacts are included. In addition to the example above, other possible reasons for using a group would be to select only individuals or only organizations.

Select a Tag, if desired. If none are selected, all contacts are included.



The results displayed will show a row with each donor and columns for the prior three periods and a total for the periods before that, and a life time total donation.

You can also display the annual totals as results in a bar chart or a pie chart. It does not show the individuals.

While you can export the list of contacts, at this time you cannot add them to a group for use in future fundraising.

Introduction

To collect information from your web site, you have to tell PowerBase what fields you would like to collect. For example, if you'd like to send newsletters to supporters, you'll need to collect email address, at minimum, and first name and last name and possibly an address field such as zip code. Your set of fields might look like this:

First Name
Last Name
E-mail address
Home Zip code

If you're collecting registrations for a fundraising dinner, you might need to collect additional information such as the full street address and dietary preferences. Some of this data might not be predefined as part of PowerBase. In that case, you'll will have to create custom fields. It's outside the scope of this document to describe the best practices for creating custom fields.

We refer to any data collected from your external public-facing pages that appear on your web site or directly on your PowerBase site as "on-line", "public", or "external" and data input by you or your colleagues who have logged in as "off-line", "User and User Admin Only", or "internal". Of course, all of it is online, but this is a convenient way to separate out pages that you are preparing for the general public and pages that will be used internally.

Once you define the information you would like to collect, you will need to create a "**profile**". **Profile is an arrangement of one or more data fields that are in your database**. Profiles can be used to collect new data, change field data or to display data. Profiles can contain information from the contact table, the event participant table, the activity table, the membership table or the contribution table. You may combine fields from the contact table (individuals or organizations are stored in the contact table) and optionally one of the other tables. You cannot make any other combination of tables in a profile at this time, nor can you put organization and individual information on the same profile.

Since this document is all about public profiles, we won't be describing all the other ways that you can use profiles, which include Batch Update via Profile, showing different Search Results in Advanced Search, and for simplified Data Entry screens.

This section draws on information from the CiviCRM manual. This section covers profiles: http://book.civicrm.org/user/current/organising-your-data/profiles/

Orientation

If you have Administer menu access, you can create the profile going to **Administer>Customize Data and Screens>Profiles.**

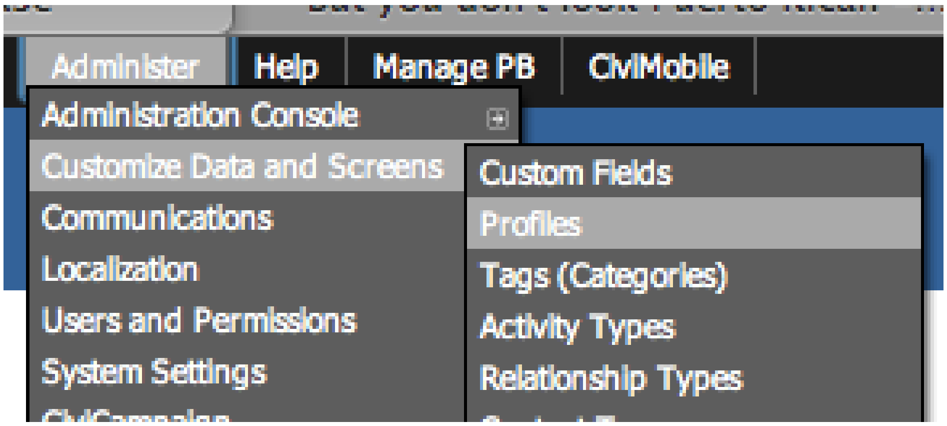


Figure 1 Finding the Profile Menu

You will come to another screen that allows you to add or update an existing profile. It has two tabs: **User-defined Profiles** and **Reserved Profiles**. We are interested in the User-defined Profiles for this document, but from time to time knowing where the Reserved Profiles are stored can come in handy for changing some default settings.

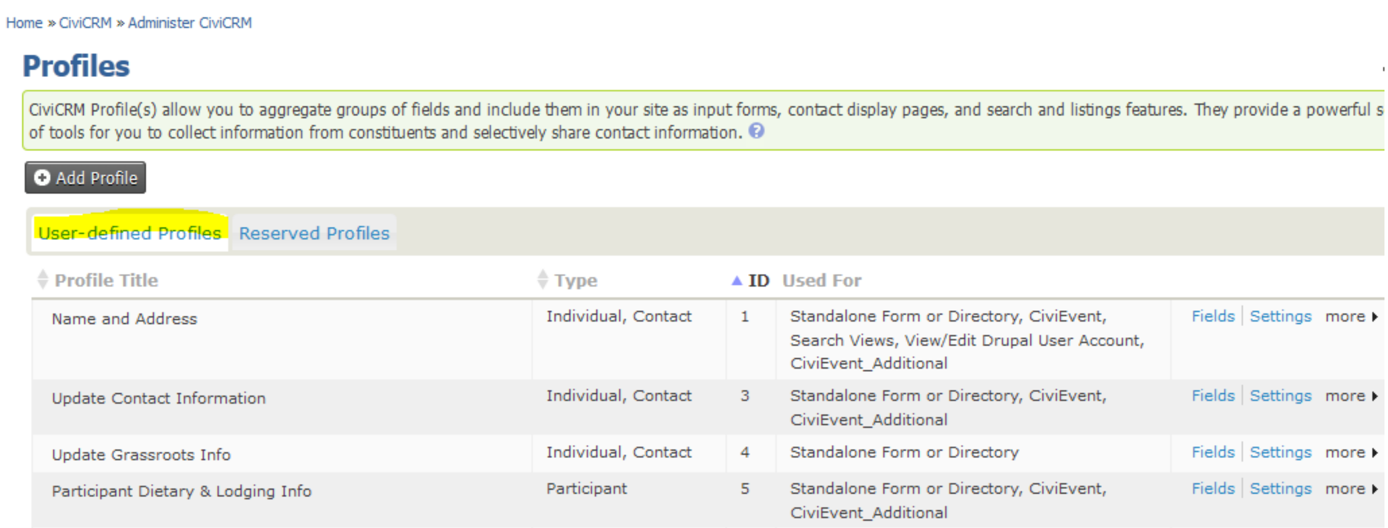


Figure 2 The Profile Selection Page

The list includes the **Profile Title** which is name of the profile which, by the way, is used on Public facing pages as the heading above the fields,

Type, which indicates which tables are being used,

ID is very important. It's used to differentiate among all the profiles that you have. You need to know it in many cases for external web form use.

Used for, which shows the uses that it can have. On the right you have some options for modifying the profile.

Fields brings up the list of fields associated with the profile.

Settings changes the overall profile. It has fields like Profile Name (aka Profile Title), help text, and some other critical information.

The **more** option includes additional actions.

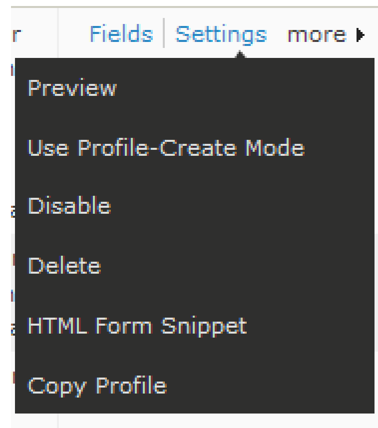


Figure 3 The more menu

- **Preview** shows the entire profile.
- **Use Profile-Create Mode** will allow you to do data entry with the profile, if it's been set up for that.
- **Disable** makes the profile unavailable for use, but does not delete it.
- **Delete** *does* delete it. Deleting a profile will not delete any data in your database, but it may cause a problem if the profile is in use on an external page somewhere.
- **HTML Form Snippet** opens a page with html coding that can be copied and used in another web site. This is typically used in situations where your web site is collecting contact information such as name and email address for e-newsletter sign ups.
- **Copy Profile** will make a duplicate of the profile. This is a handy way to get started with a new profile. Just rename it after you get it duplicated.

Preparing for a Profile

Online profiles have some unique features that allow you to control such things as

- who gets informed when a profile is used,
- what data can appear in a list if you chose to display contacts in your database,
- what group should hold new contacts as they are entered,
- whether to update contact records or to add them as duplicates.

We recommend creating a group *beforehand* that will hold the new entries that come into your database through the external site. You can do this with the **Contacts>New Group** menu option.

> ***Tip:*** *Pay attention to where your profiles are being used. They can be hard to track once they are put on a public page. The best practice is to copy, rather than change, an existing profile. This prevents you from accidentally breaking another site. Conversely, when a profile is no longer in use, Disable it so that it's clearly not available. Disabling also allows you to re-enable it if you find you've removed the wrong profile.*

We also recommend that you add new contacts, even if they are duplicates. This prevents someone from overwriting existing data. The implication of these choices is that you will have to regularly monitor the entries that come in through the web site. This is easy if you have them being added to a group. We recommend that you move them out of that group once you've done your due diligence to make sure the data is accurate and conforms to your data protocols.

Profile Settings

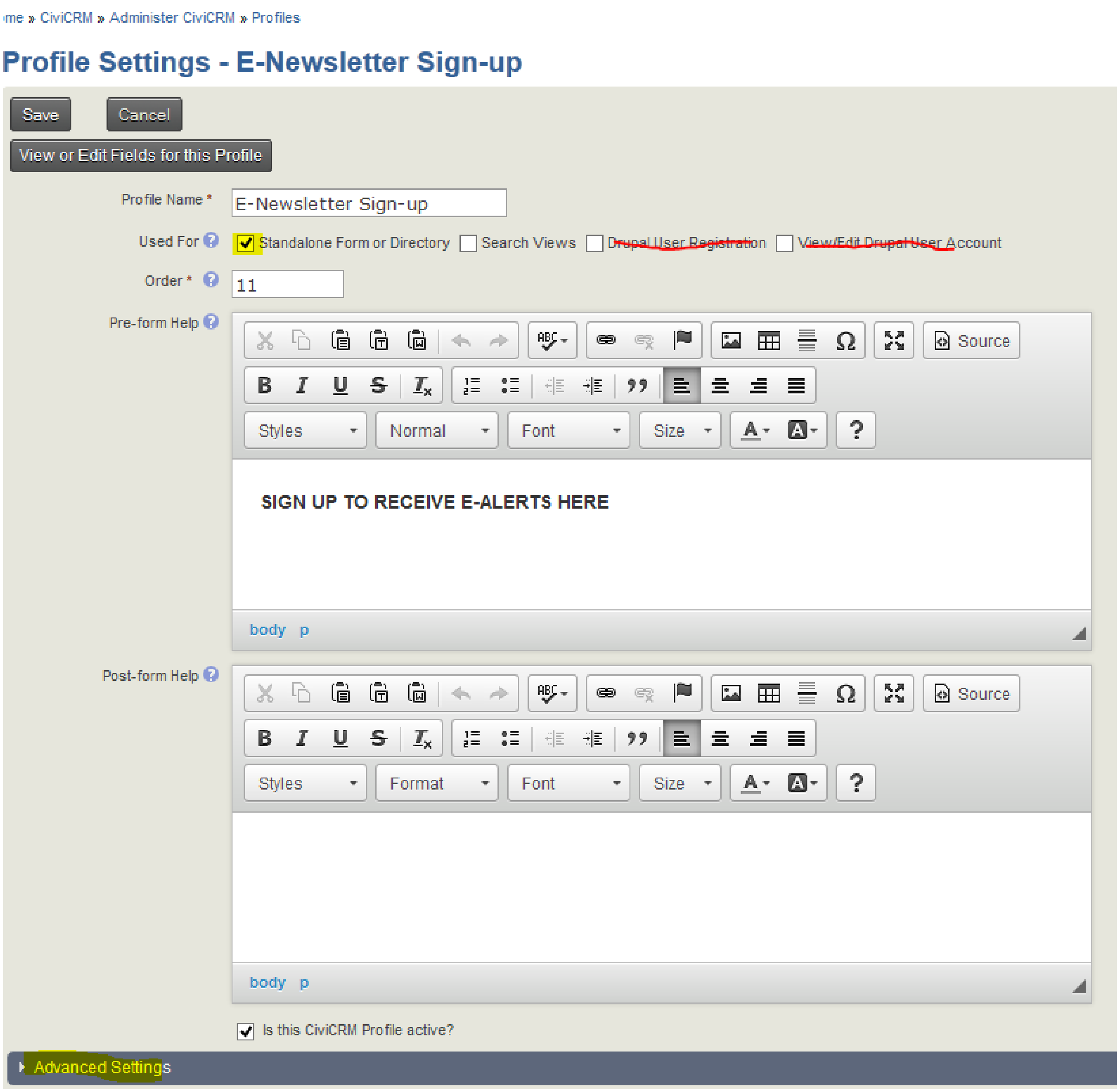


Figure 4 Profile Settings - Basic Settings

The Profile Settings is the first page you come to when adding a profile. It contains critical information about the profile and it allows you to add some instructional text with web formatting.

Profile Name: Select this text thoughtfully. It will be the heading above the fields on your external page.

Note the tiny question mark with a circle around it. Click on that to get specific instructions for the section you are in.

Pre-form Help: What you enter here will appear above your profile fields on the external page. You can adjust the fonts and add images to it.

Post-form Help: What you enter here will appear below your profile fields on the external page. You can adjust the fonts and add images to it as well.

You have to click the triangle next to **Advanced Settings** to open up this dialog section:

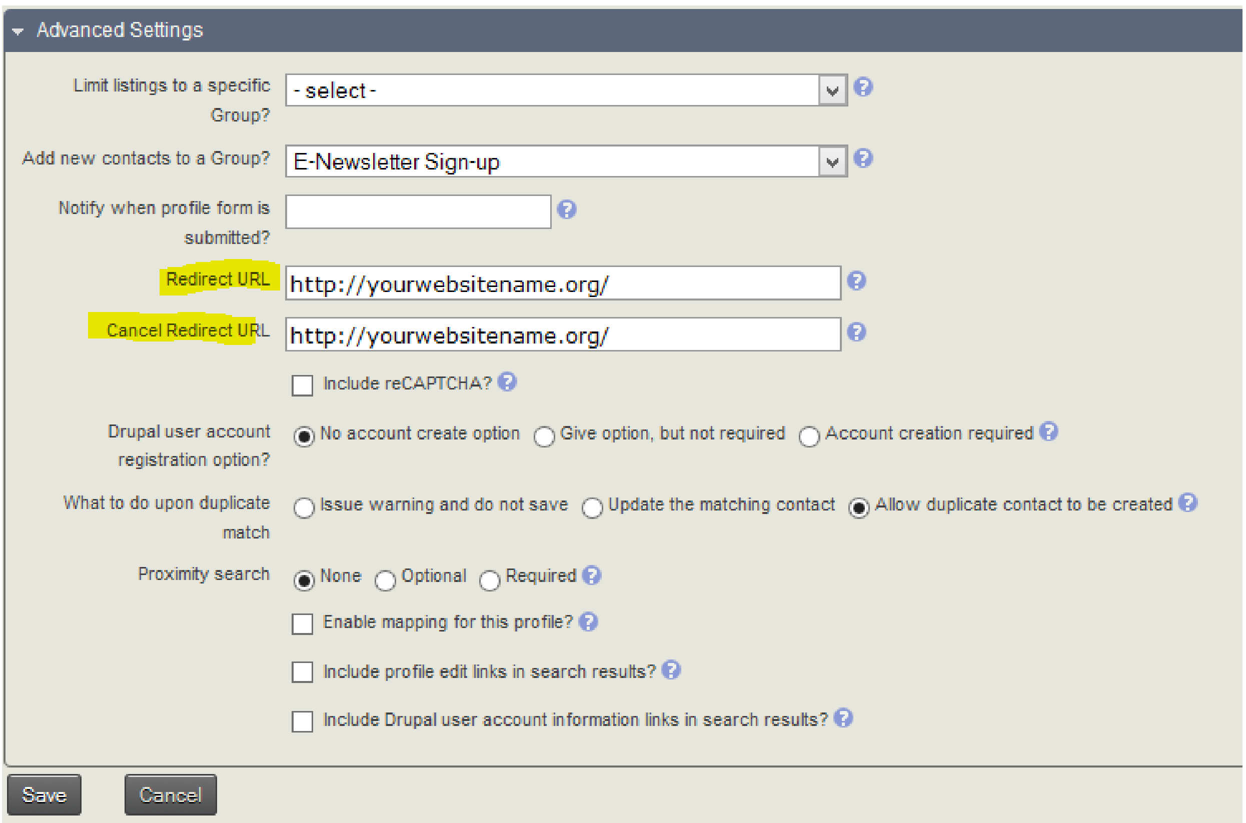


Figure 5 Profile Settings - Advanced Settings

Advanced Settings is the place where some crucial settings are made.

Limit listings to a specific group? In almost all cases you do not select a group. This is designed for publishing member lists and isn't often required.

Add new contacts to a Group? We recommend always adding new contacts that come from the web side of the world to a group. It helps you keep track of what's coming into your database.

Notify when profile form is submitted? Enter the email address(es) of people that should find out if the form has been used to create a contact. Depending on how your work is organized, this may not be necessary, but some groups do use it.

Redirect URL This is the web site address that the user will go to after completing the form. Typically it's the home page of your web site.

Cancel Redirect URL This is the web site address that the user will go to if they cancel out of entering the data. Typically it's the home page of your web site.

*A URL is the entire web address **including the http:// or https:// portion.** Failing to include the http section will cause a weird error to occur after a form is submitted.*

Include reCAPTCHA? This tool is a free service that helps prevent automated abuse of your site. To use it, you get a license from Google https://www.google.com/recaptcha. Then you enter your keys into your PowerBase set up. Go to **Administer>Administration Console**. In the **System Settings** Group, you'll find the ReCAPTCHA set up link.

Drupal user account registration option? Always select **No account create option**.

What to do upon duplicate match We recommend selecting **Allow duplicate contact to be created**

Proximity search Select **None**

Enable mapping for this profile? Leave unchecked

Include profile edit links in search results? Leave unchecked

Include Drupal user account information links in search results? Leave unchecked

Once you've completed the settings, press **Save** and you'll go on to add fields to your profile.

Adding Fields in a Profile

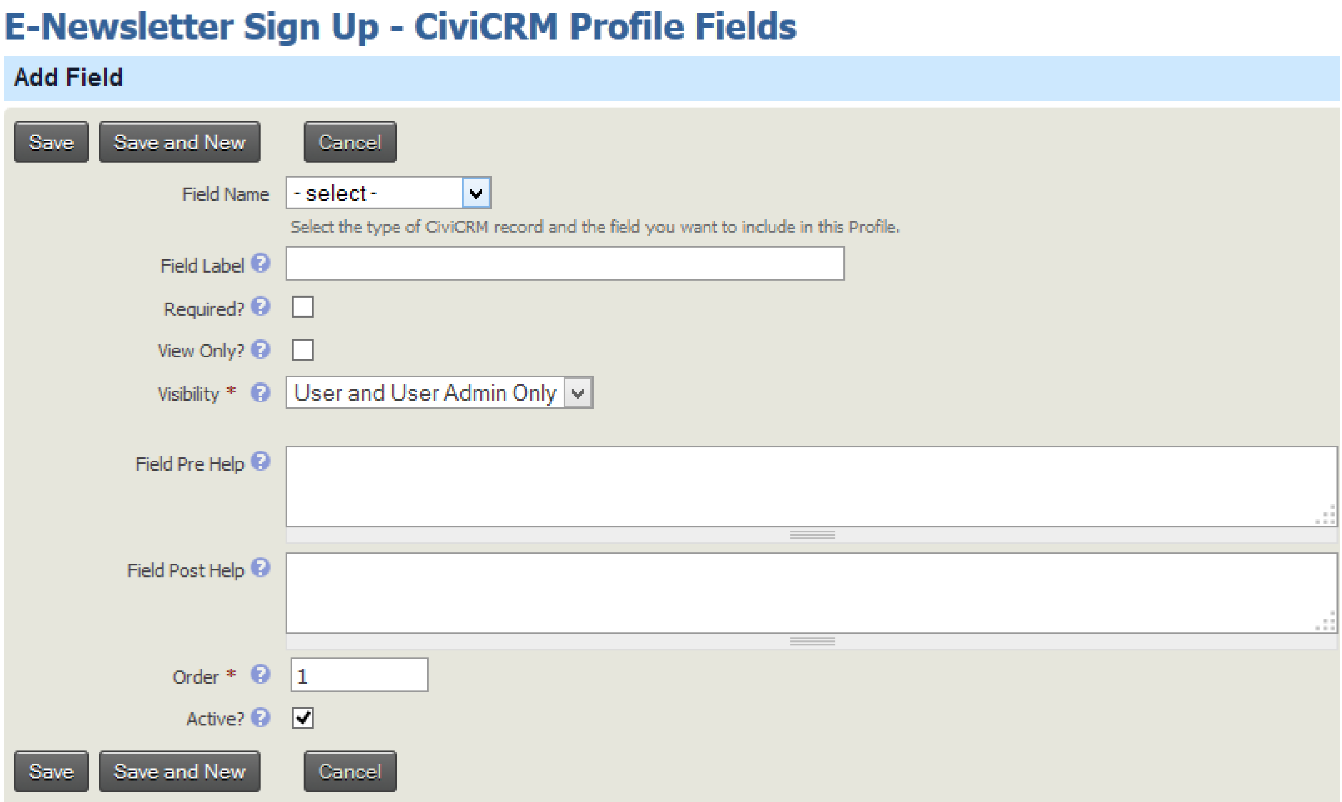


Figure 6 Add a Field Page

You can get to this page by selecting the fields option next to a profile name. If adding a new profile, you'll automatically get to this page.

Field Name is where you pick the fields that you will put on your profile. You are given a choice of tables to work with. Once you select a table, you will get a list of fields. Contact table contains the fields that are common to Individuals and Organizations. Individuals and its contact subtypes contain information that applies to people. Organization and its contact subtypes contain organization information. For an e-newsletter, we'll be collecting name and email address so we'll show the screens involved.

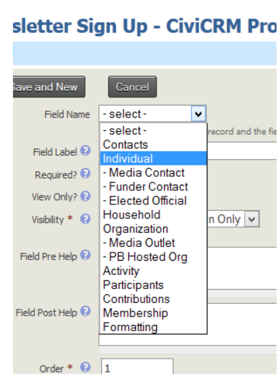
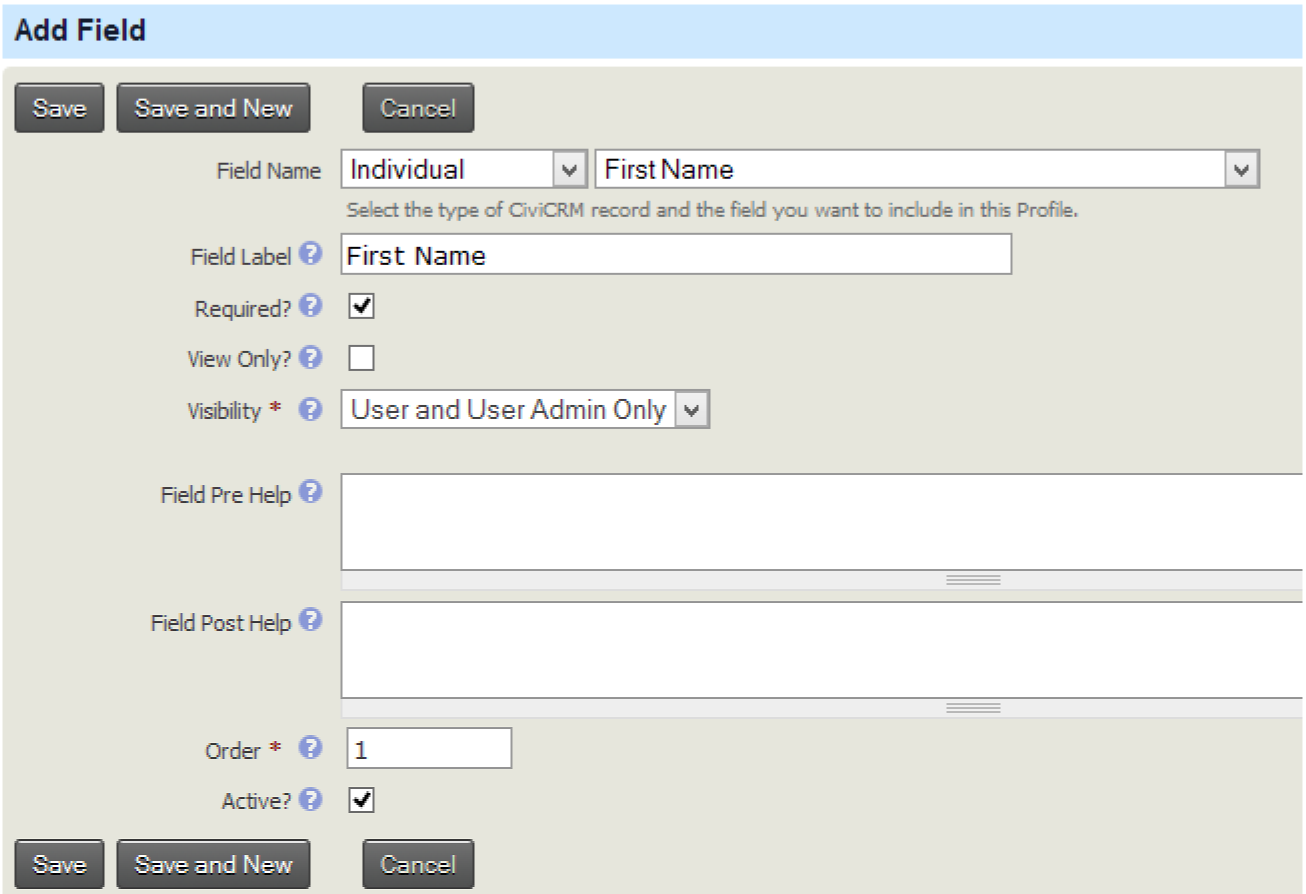


Figure 7 Tables available



Select **Individual**, then select **First Name**.

The **Field Label** will be loaded automatically but you can edit it afterwards.

Required? Select this check box to ensure that the user fills out this field.

View Only? Leave unchecked.

Visibility Leave at **User and User Admin Only**

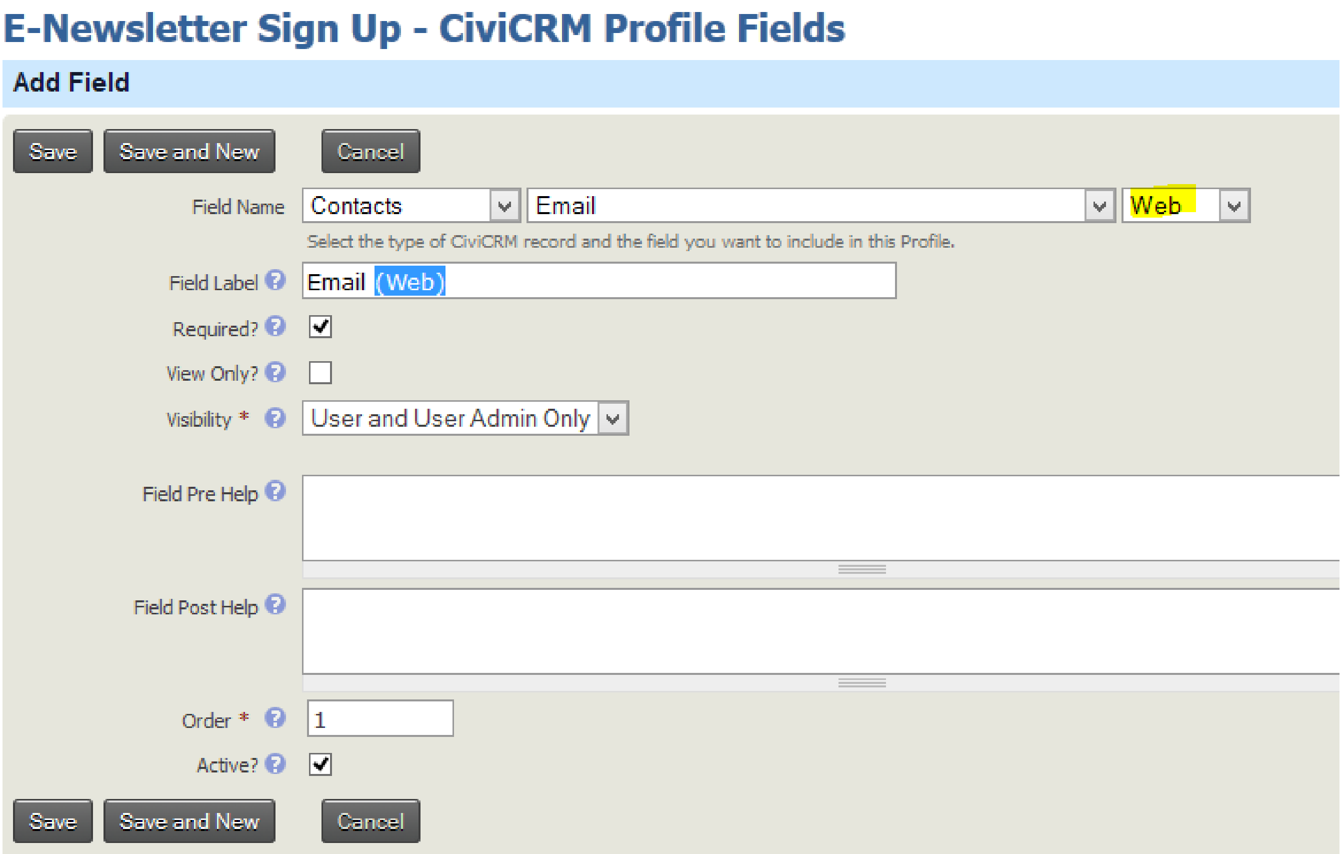
Field Pre Help Use as needed. You can use html for this.

Field Post Help Use as needed. You can use html for this.

Order This controls where this field appears on the list of fields

Active? Identifies about whether this field name is active or not.

Repeat this process for last name. Now we'll look at entering the email address.



To enter email address and street addresses, select the Contacts table then select the field. Fields like email, phone and address have a **Location type** associated with them. We recommend to not use Primary as the Location type since it actually is an *attribute* of Location type but isn't actually a Location type. If you use Primary, it generally will make the entry of the type Home. This can result in the good data being overwritten by questionable if not downright bad data. We recommend making a location type of "Web" or some such so that you know the information came in from your web site.

You can create new Location types by going to ***Administer>Administration Console****. Look in the* ***Customize Data and Screens*** *section for* ***» Location Types (Home, Work...)***

Using Your Profile

Once you've built your profile, you can use for data entry in Events Online Registration or the Include Profiles of a Contribution Page. The "html Snippet" can be inserted in your web page by someone with permission to access and change your web site.

Receipts are email messages that are delivered as a result of a financial transaction in CiviCRM. If someone donates via an online contribution page or pays an event fee by registering online and if you have set the page up to do so, a receipt will be automatically sent. If you record a contribution or other payment in "offline" mode, you have the option of sending an email receipt. Thank you letters are done separately from receipts and are not covered in this document. Note that sometimes your payment processor (authorize.net does this) will also automatically send a receipt for credit card transactions. In many cases, you can turn that off on the control panel of your payment processor.

Receipt Sources:

There are multiple sources of receipts in CiviCRM.

- Each Contribution Page has a custom "Receipt Message" section that appears before the system wide receipt text.
- Each Online Event Registration Page has a custom "Confirmation Email" receipt Text section that appears before the system wide receipt text.
- "Offline" or manually entered contributions have an option to send a receipt
- Recurring contributions have a separate set of receipts

In addition, your payment processor will often have an option of sending its own receipt from outside of your CiviCRM installation.

Modifying Receipts

You can edit the text that's in the receipts in two ways:

1. If you are on an Internet facing contribution page's "Thank-you and Receipting" tab or an event page's "Online Registration" tab, it's an option in the page set up. Note that this text can be html but that CiviCRM does not give you the full html editor for that input box. If you aren't comfortable editing html directly, one trick is to use another window to edit the text using the full editor and then copying the source html into the text box. Receipts on these pages will only apply to financial transactions issued from these pages. Note that what's edited here will be added to the default receipt template.
2. The default text for receipts can be edited from a menu option on the Mailings Menu. Go to Mailings>Message Templates. Once there, click on "System Workflow Messages" to get to a list of all the text included in the receipts. You can also get to these receipt templates from Administer>Communications>Message Templates These system templates use the PHP language to generate the text via Smarty templates (www.smarty.net). You can add html as well. Note that these templates apply to ALL transactions coming from your PowerBase. So, for example, if you are hosting payments for a C4 and a C3 organization, they will both receive the text on these receipts.

Editing receipts can be complicated to modify, so feel free to reach out PowerBase Support with questions.

Setting up and Managing Personal Campaign Pages

Introduction

Personal Campaign Pages (PCPs) are web pages that supporters can use to promote your organization. They define a goal and customize it to collect contributions for your organization. The PCP has a place for a picture, a place for a story and a thermometer showing what percentage of the goal has been received. There is an optional scrolling box (called an Honor Roll) with optional comments and donation amounts from your donors.

CiviCRM's documentation says this about PCP's:
A personal campaign page allows your constituents to personalize the fundraiser, event, organization, etc., by offering their personal reasons and/or experiences with the organization on their own personal page. Also, your contributors may in turn send the personal campaign pages to their circle of friends. You can enable the "tell a friend" feature to help someone share their page even more.

CiviCRM manual's section on PCP's is worth checking out. We won't be covering the same material in this document. http://book.civicrm.org/user/current/contributions/personal-campaign-pages/

The current workflow model for PCP has these steps:

1) Create a contribution or event page and complete the **Personal Campaign Pages** tab.
2) Change your PowerBase Account Settings to allow Visitors to register accounts.
3) Send out invitations to supporters to make a contribution or register for the event or, you send them a direct link to set up the PCP.
4) If required, the supporter makes the contribution or event registration and agrees to set up a Personal Campaign Page.
5) Supporter registers a user profile and receives an email with a link to their Personal Campaign Page.
6) The supporter edits the page.
7) You approve the page so that it becomes active.

A variation on this approach, which at this time requires assistance from the PowerBase support team, is to create all the pages for your supporters so that all they have to do is promote the page. This greatly reduces the supporter's workload and need for technical savvy.

A PCP connected to a contribution page will always link to a contribution page. A PCP linked to an event will either link to a contribution page or it can link to a registration page for the event.

Creating a contribution or event page with a Personal Campaign Page

Contribution Page PCP

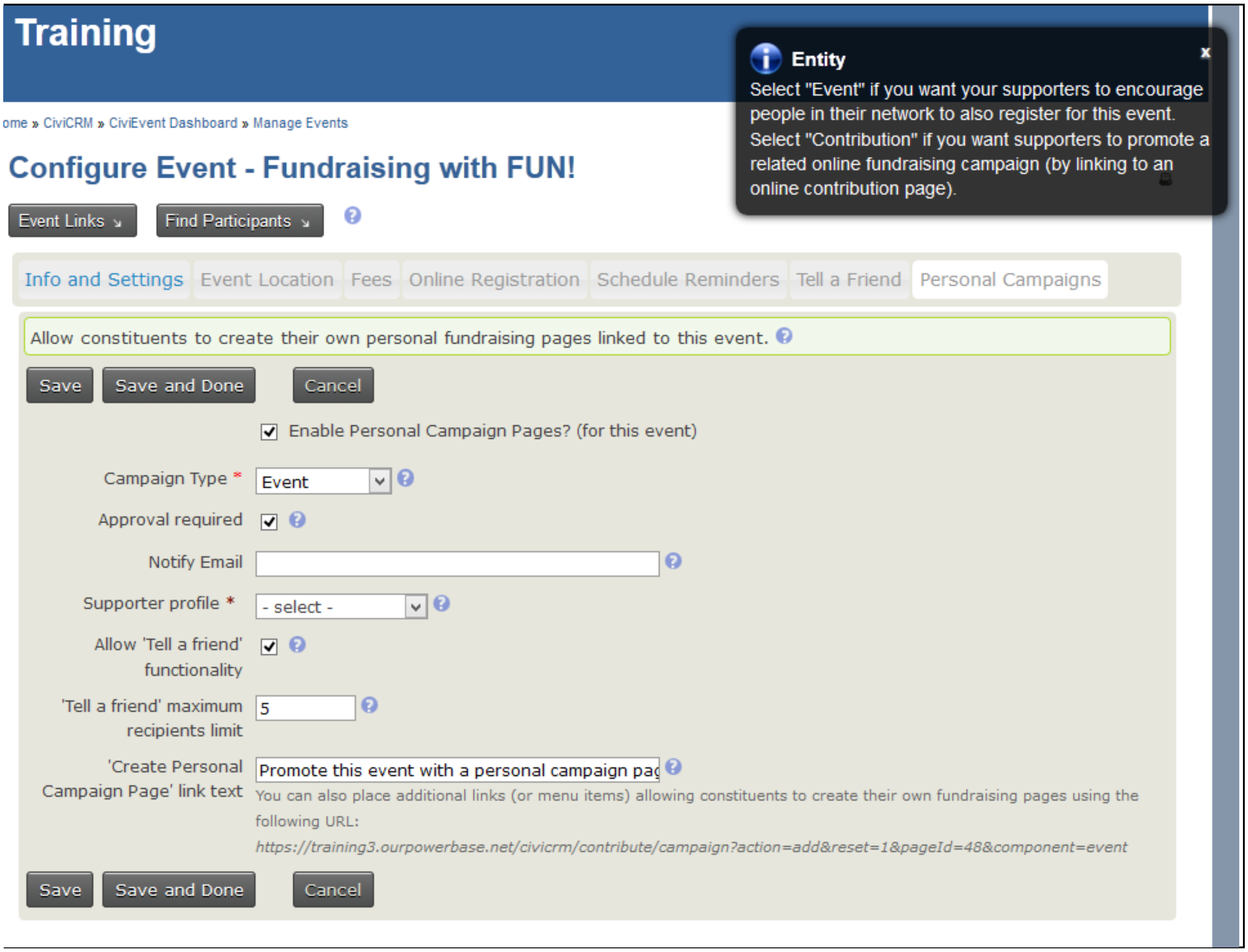
The last tab of the Contribution page set up is the one that controls whether the PCP will be included. After enabling it, you can change the appropriate parameters depending on your need. Each of the parameters has a help icon associated with it. Click on it to get more information.

Note the link at the bottom of the PCP screen. Save it and send it to volunteers who will be doing your fundraising so they can create a page of their own without making a contribution first.

Event Page PCP

Similarly, the last tab of the Event set up holds the PCP page. The big difference between the Event PCP and the Contribution PCP is that you have a choice as to whether the action taken on the Event PCP takes the donor to a contribution page or to the associated event registration page.

Setting up and Managing Personal Campaign Pages



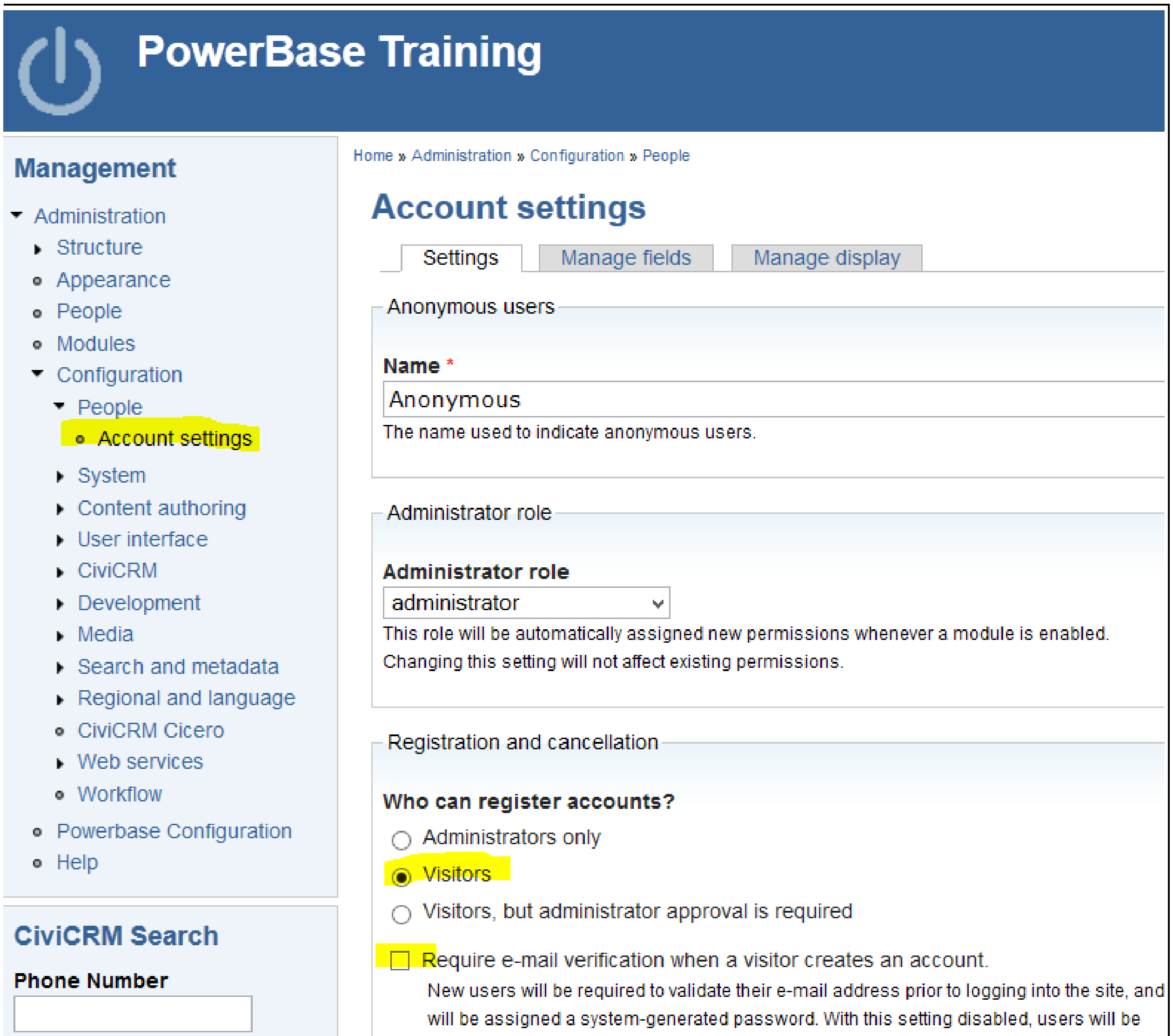
Allowing Fundraising Volunteers into your PowerBase

If you choose to let fundraising volunteers into your PowerBase so that they can log in and edit their PCP, you'll need to have your PowerBase Administrator change user creation permissions on your PowerBase site.

Click Administration from the left hand column. Then Select Configuration>People>Account Settings.

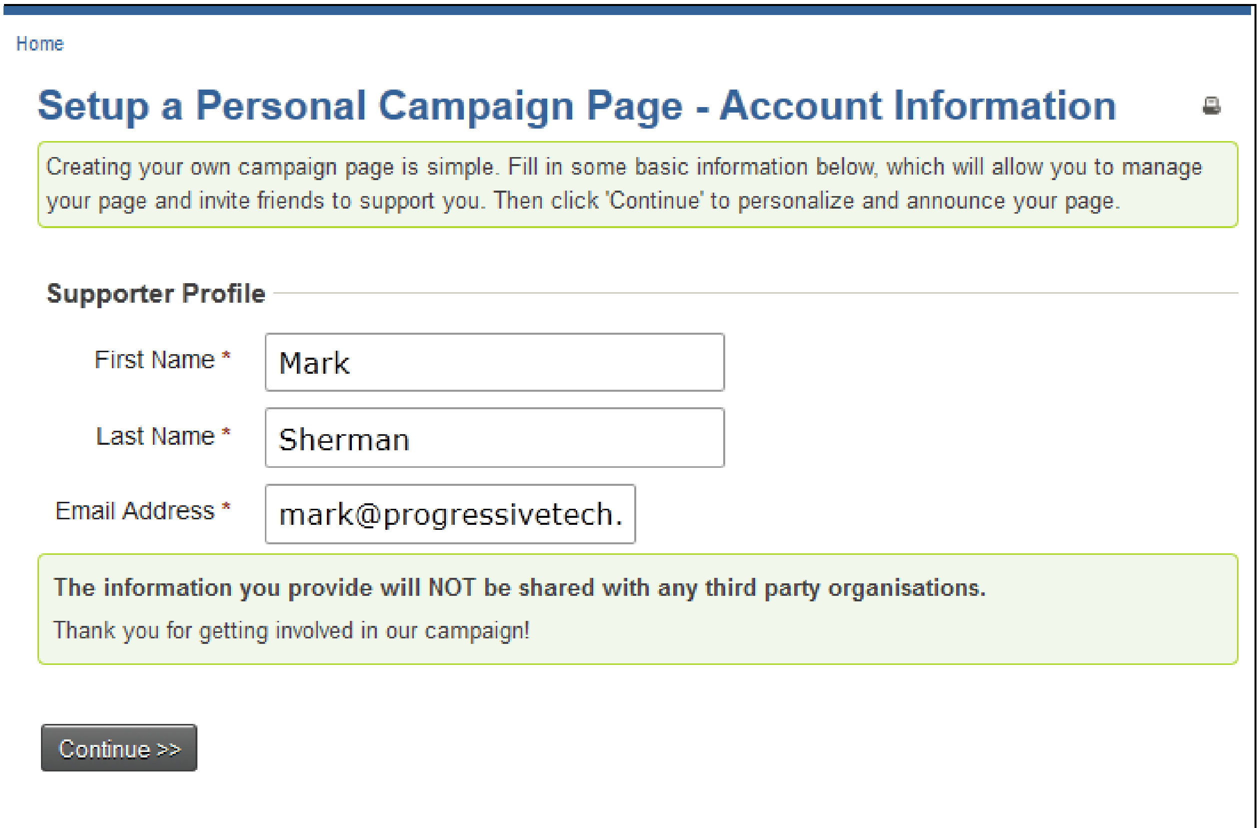
Change "Who can register accounts?" to "Visitors". Unselect the option to "Require e-mail verification when a visitor creates an account".

Remember to set "Who can register accounts?" back to "Administrators" when the campaign is over.

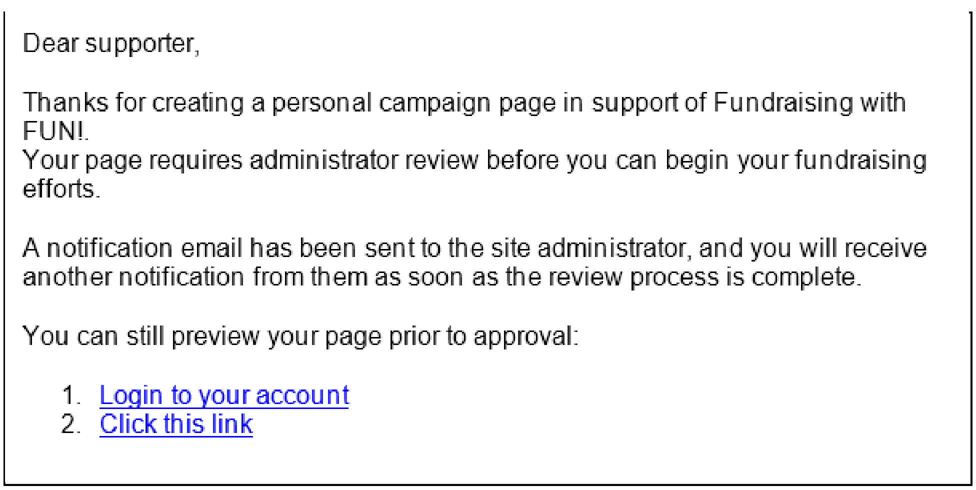


Supporter Registers a User Profile and Receives a Link to their PCP

If your supporter agrees to sign up via the online connection that you send or via a button, they will get a screen with fields from the "Supporter" profile that you linked to the PCP. At minimum, they should provide first name, last name and email address. On the subsequent screen they will create a user name and profile.



If you are creating the user profile for your donors, MAKE SURE that you are NOT LOGGED IN to your PowerBase with your user log on. The best practice is to use another browser that is not logged in. And log out after each user profile creation.



Each supporter will get an email like this when you create their user id and page.

Setting up and Managing Personal Campaign Pages

Supporters will come to a page where they can initially define their PCP. They have some required fields – Title, Welcome message. They can finish it all now, or, using the link in their email, return later and complete it.


Setup a Personal Campaign Page - Step 2

Personalize the contents and appearance of your personal campaign page here. You will be able to return to this page and make changes at any time.

Title *

Welcome *

Introduce the campaign and why you're supporting it. This text will appear at the top of your personal page AND at the top of the main contribution or event registration page.

Your Goal *

Total amount you would like to raise for this campaign.

Progress Bar — If this option is checked, a "thermometer" showing progress toward your goal will be included on the page.

Sign up Button — Join Us

The text for the contribute or register button.

Your Message — Tell people why this campaign is important to you.

Include a Picture or an Image

You can upload a picture or image to include on your page. Your file should be in .jpg, .gif, or .png format. Recommended image size is 250 x 250 pixels. Maximum size is 360 x 360 pixels.

Attach File — Browse... No file selected. (clear)

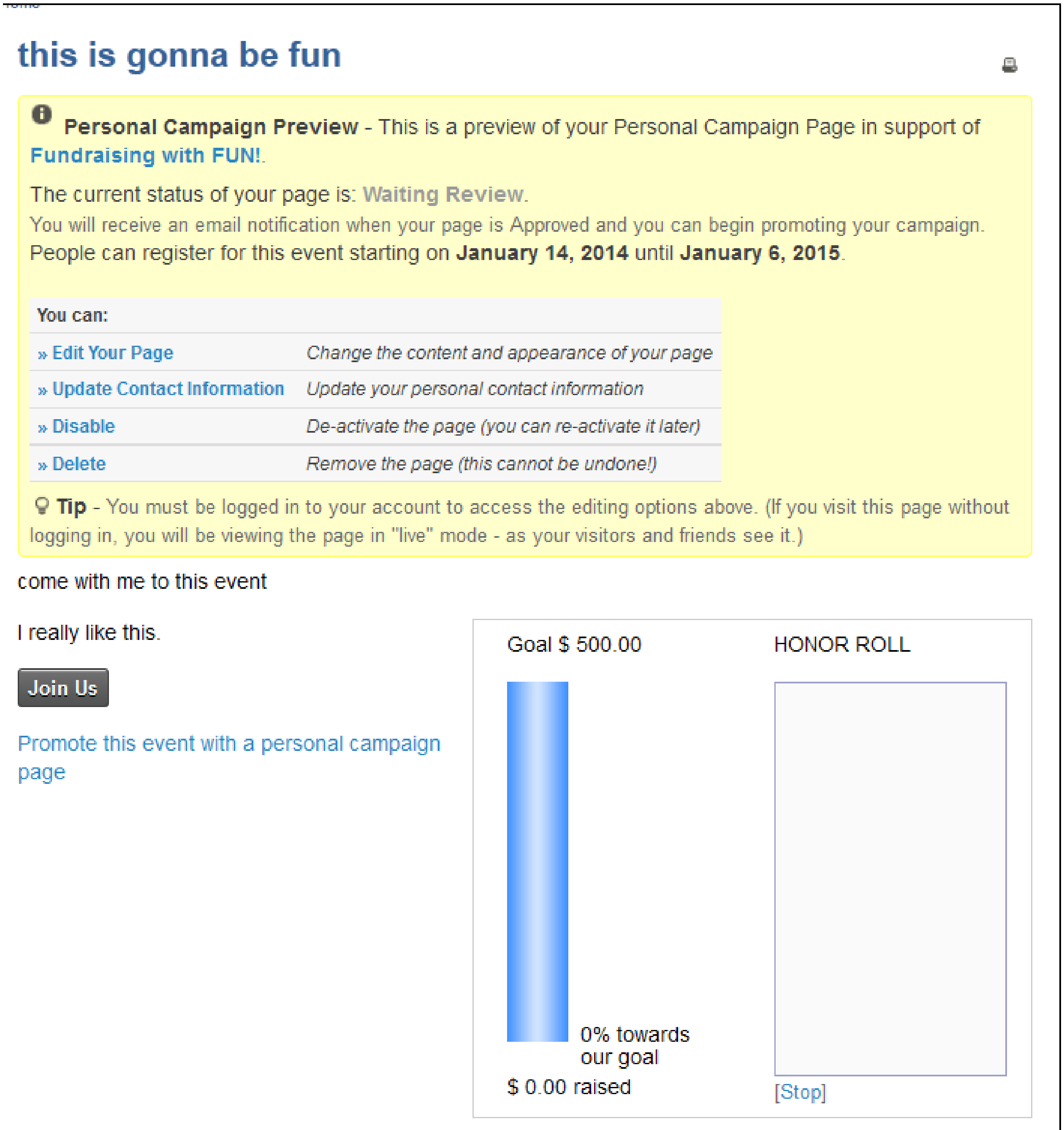
Browse to the **file** you want to upload. Each file must be less than 2M in size. You can also add a short description.

Honor Roll — If this option is checked, an "honor roll" will be displayed with the names (or nicknames) of the people who supported your campaign. (People will have the option to remain anonymous. Their names will NOT be listed.)

Active — Is your Personal Campaign Page active? You can activate/de-activate it any time during it's lifecycle.

Save Cancel

Note the size requirement for pictures. You may have to help them resize their photos so that they can be uploaded.

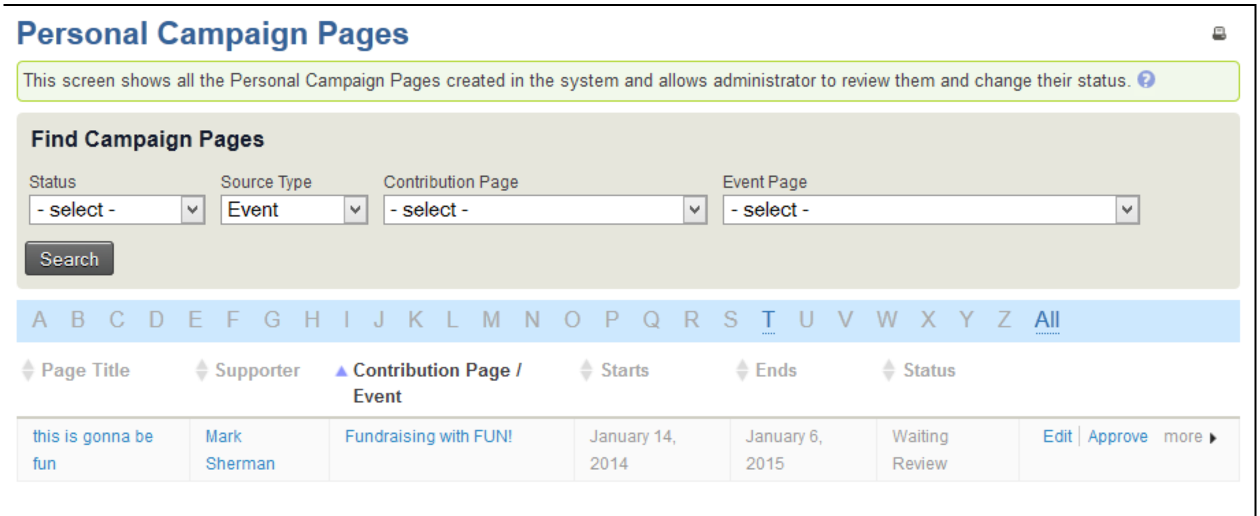


This is the edit page that the supporter sees when they log in to their account.

Approve the Page

If you need to approve the PCP, or if you want to examine the progress of your supporters and perhaps edit their page, you can access the list of PCP from the "Personal Campaign Page" option off of the Contributions and Events Menus.

Setting up and Managing Personal Campaign Pages



Introduction

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase.

The basic work flow of Phone Bank is this:

1. **Configuration**
    a. Determine if this will be collecting Donation or Membership payments and configure the button.
    b. Determine which fields should appear in the pop up when you mouse over a record in the survey
2. **Set up the Survey type of Phone Bank**
    a. Add questions as custom data or reuse prior custom fields
    b. Put them on a profile or reuse a prior profile.
    c. Add them to the Phone Bank Survey
    d. Determine a "Result Set" and add it to the Phone Bank Survey
3. **Create Group(s) to be interviewed**
4. **Prepare for volunteers**
    a. Add survey to a menu
    b. Create volunteer logs in and assign them to a special permission group of PowerBase Phone Bank
    c. Train the volunteers and staff that will be calling
5. **Start Calling**
    a. Using your new Survey, reserve contacts from the Group for each caller
    b. Caller logs in, makes calls and enters responses, including credit card payments
    c. Automatically release any reserved contacts after a day so they can be assigned again tomorrow.
6. **Monitoring**
    a. Use Activity and/or Survey reports to track who has not been called.
    b. Use Contribution Reports to check on receipts
7. **Evaluating**
    a. Contribution Reports for dollars
    b. Membership Reports for member renewals
    c. Activity and Survey reports for number of calls made

Introduction

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase. Survey is a general term used in PowerBase for the module that handles creating questions and collecting answers from a population. Surveys are used for a variety of purposes, such as collecting opinions, fundraising, and they even can be used for getting commitments to attend one or more upcoming events. Survey is not designed to serve as an online survey form. For that, one would use a custom profile or even a petition.

Survey permits you to allocate (reserve) contacts to individuals who will then call or visit the contact, interact with them, and record a result. If you are recording results online, you can directly link to a page to record a contribution or membership renewal for the contact. You can update information, such as phone numbers, directly in the contact record as well as record answers to the survey. Once a contact is reached and a result recorded, the contact will not be included in a call list for that survey again. You can automatically remove the reservations of uncalled contacts on a daily basis so that the next night's volunteers can try to reach that contact again.

While this document will focus on phone banks, the same approach can be used for walk lists and other types of surveys.

Setup Configuration

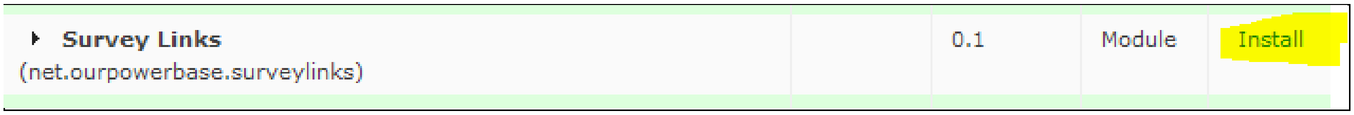
Membership or Contribution links

Phone bank can be set up so that each row in the survey has a link to the contact's contribution or membership renewal page. Clicking on it opens a tab to the correct page for the contact. This speeds up recording payments while the contact is on the phone with the caller.

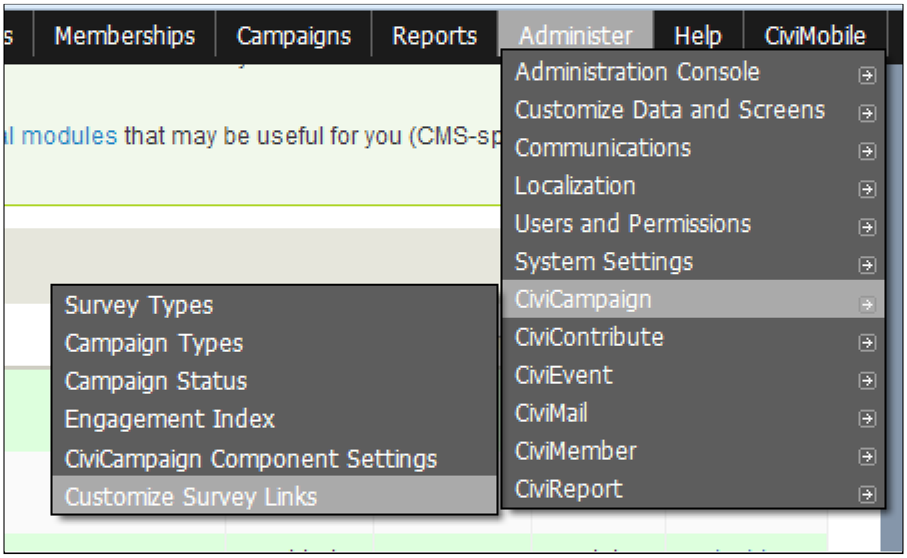
One time setup

Before using this function the first time, a PowerBase Administrator has to install the extension. To do so, go to **Administer>Administration Console**. In the System Settings section, **Select Manage Extensions.**

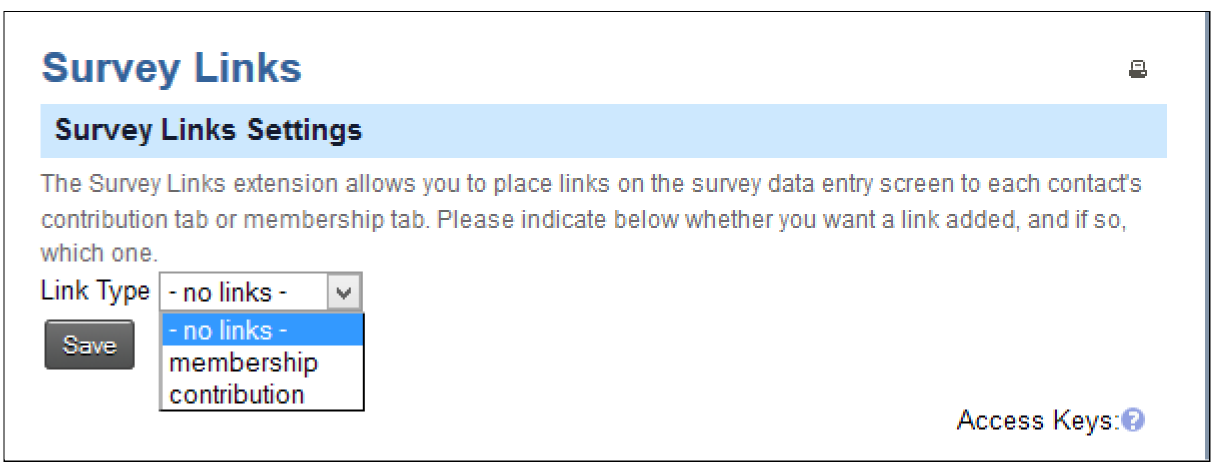
Select **Install** on the **Survey Links** row.



Once this is completed, the links can be turned on or off as needed. That is done via the **Administer>CiviCampaign>Customize Survey Links** option.

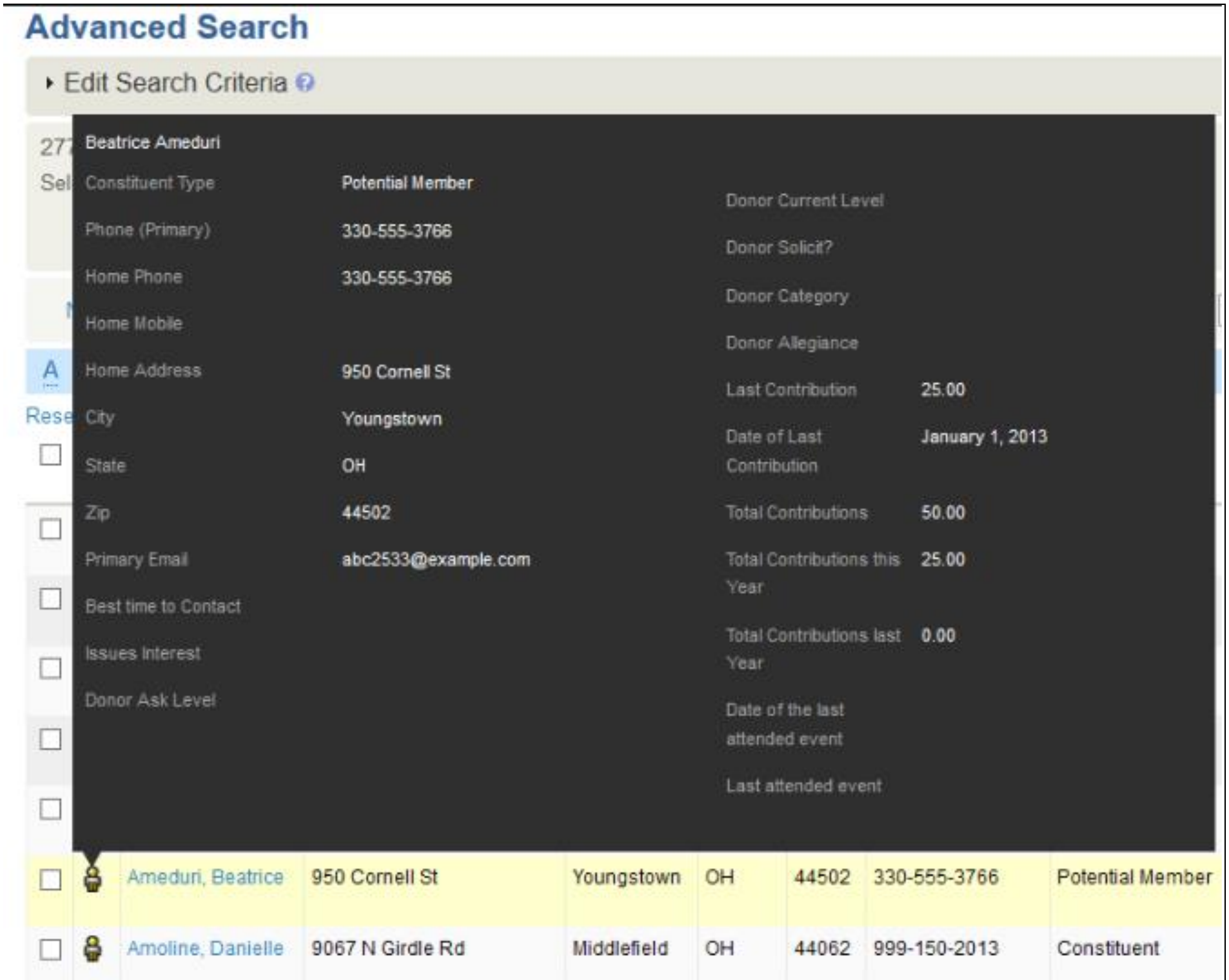


You can set the link type that you want here. Select whether the link will be to the membership or contribution contact page. Note: Once you select a link, it will appear on ALL surveys, until you set it back to - no links -



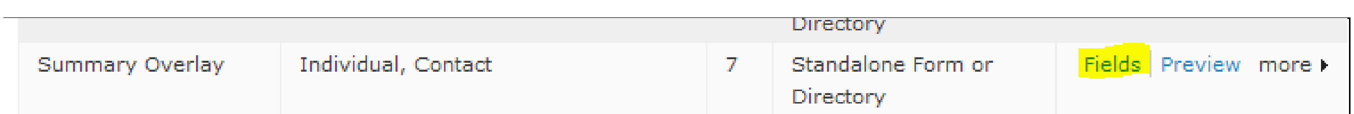
Summary Overlay

There is a handy feature called the Summary Overlay that is helpful for working with phone banks.  It's a pop up screen that appears when you mouse over the person icon on the phone bank list. It also works on the Search Results lists.



The benefit of this is that the person calling does not need to go to another screen to get detailed information on contact. You can see that there is a lot of space here for putting in information you will need as the call progresses. We've edited this example to put in items that are not in the default version.

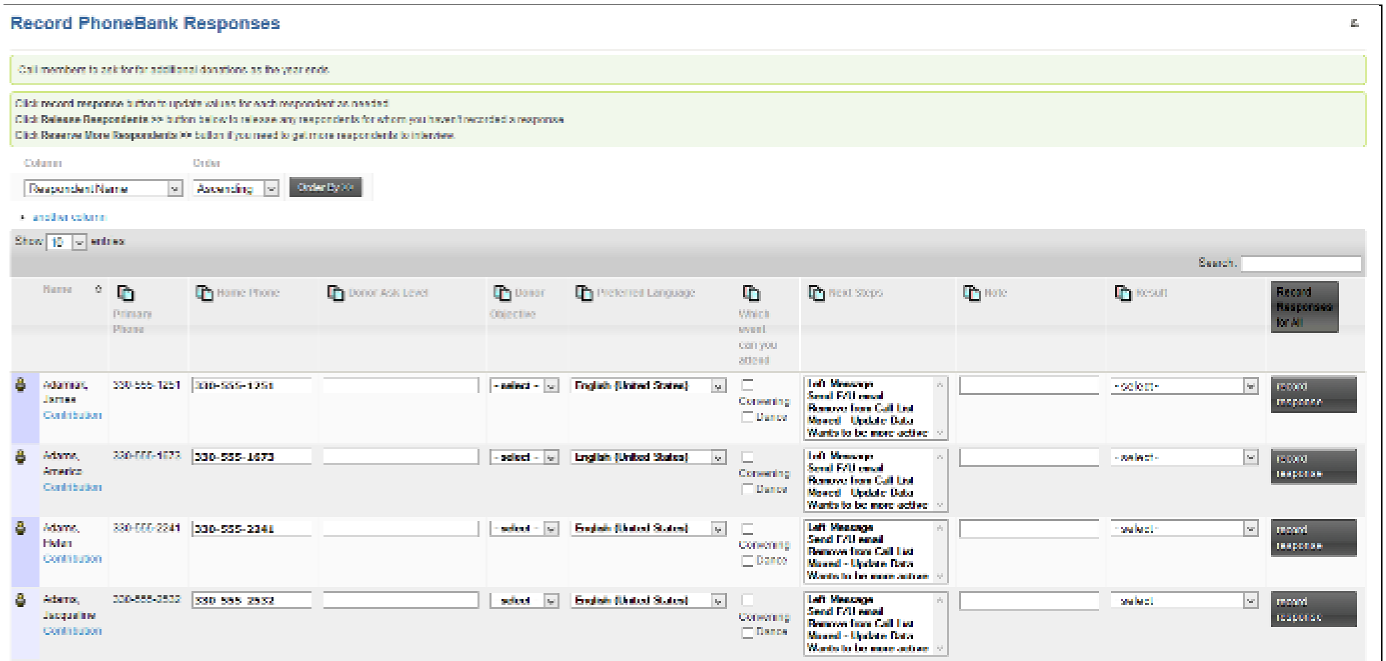
You can edit the field list that go on this page by going to **Administer>Customize Data and Screens>Profiles.** Select the **Reserved Profiles** tab. Select Fields on the Summary Overlay row.



You can add or subtract fields from here. It's okay to delete or disable them. Adding or subtracting fields from a profile to not change the underlying data, i.e. they are non-destructive.

Setup the Phone Bank Survey

Here's what a phone bank looks like when someone is calling through their list.



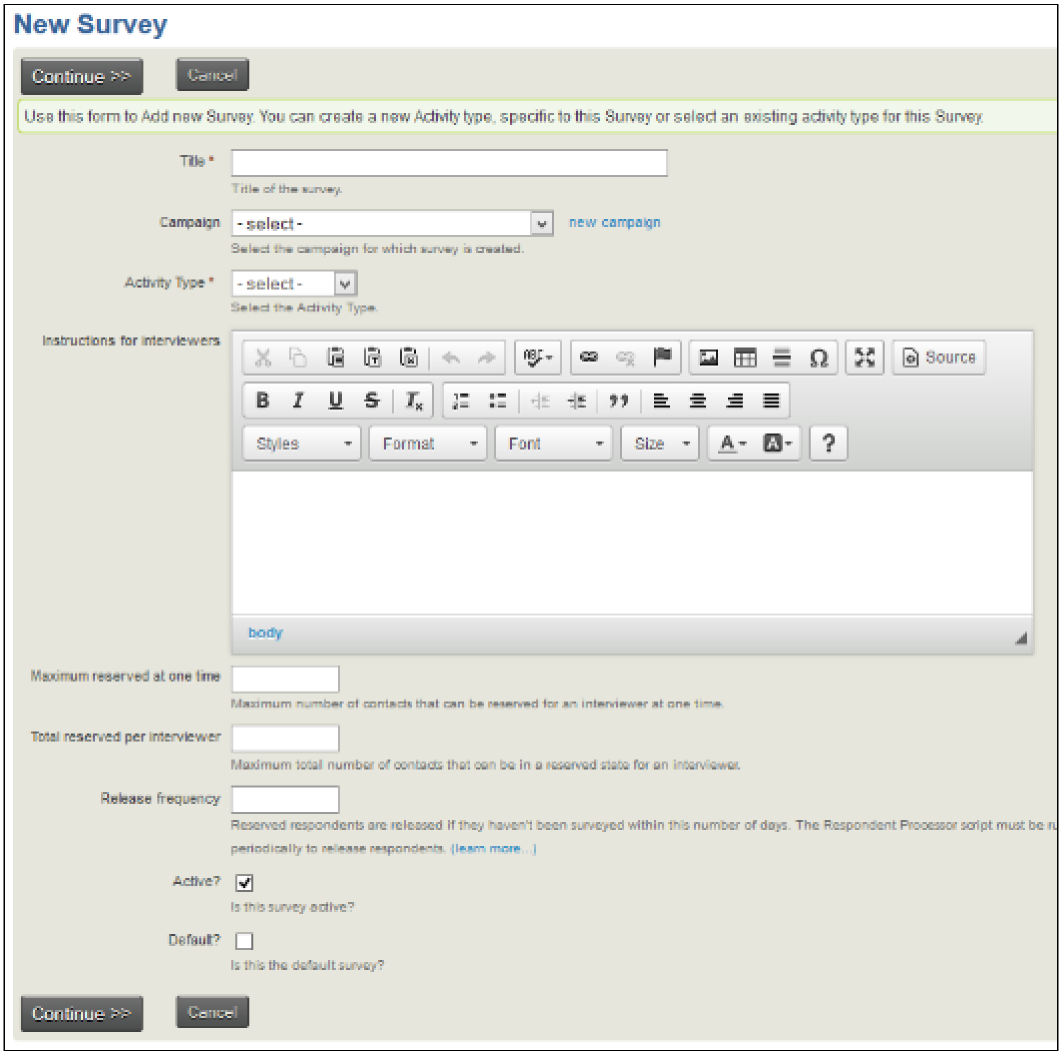
The first column is the icon. Hovering over it with the mouse will bring up the summary overlay. Next is a column with the name which is automatically added to the profile, and below it is the link to record a contribution page for the contact. This is automatically created if the Survey Link has been defined. To the right of the name are fields that come from the contact record and were placed there by the survey creator. Note that some of them are editable so the data in PowerBase can be changed on the fly. The right hand section after the Preferred Language column contains the fields that are the actual "questions", that is, the information that we are specifically seeking from the contact via this survey. These answers will be recorded in an activity record of the type PhoneBank.

Questions are not required for a survey. Sometimes the remaining columns collect all the information you are interested in.

The last three columns: **Notes, Results** and **Record Response** are automatically created by the survey record. The caller calls the phone number of the contact and holds a conversation or gets voice mail. The next steps field is recorded. The Result is marked as Completed and the caller clicks **Record Response.**

To create a phone bank survey like this, go to **Campaigns>New Survey**. You'll get the screen below.

The Main Information Tab



Put in the **Title**, select a **Campaign** and select the **Activity** type of PhoneBank.

You can fill in optional **instructions for interviewers** that will appear on the phone bank page.

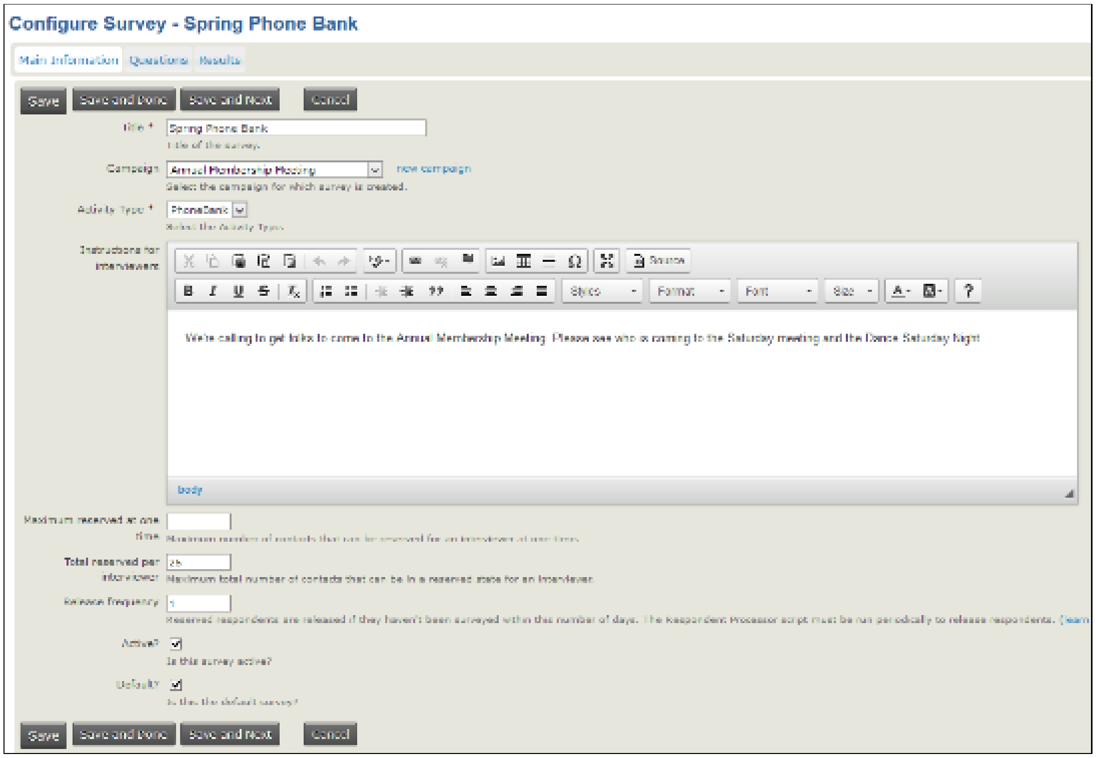
The **Maximum reserved at one time** field holds the maximum number of contacts that can be reserved at any one time to be interviewed. Generally leave this blank.

The **Total reserved per interviewer** is the maximum that can be reserved for any particular interviewer.

Release Frequency is the number of days that a reserved contact is allocated to an interviewer. If the interview with the contact is not completed or released before this time is up, the reserved contact is released so that it can be allocated to another interviewer. Generally set this to 1, for one day.

Active? Check this box to make this an active survey.

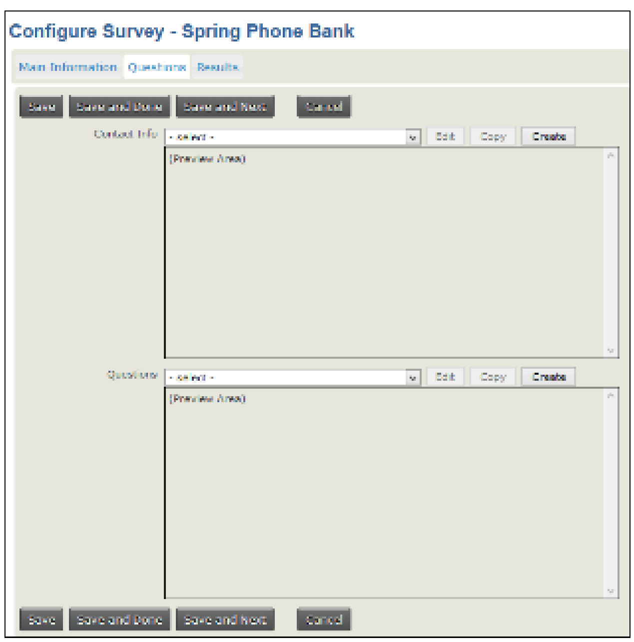
Default? Check this box to make it the default. It's convenient to have the default selected when you are reserving respondents later.



Click **Continue.**

The Questions Tab

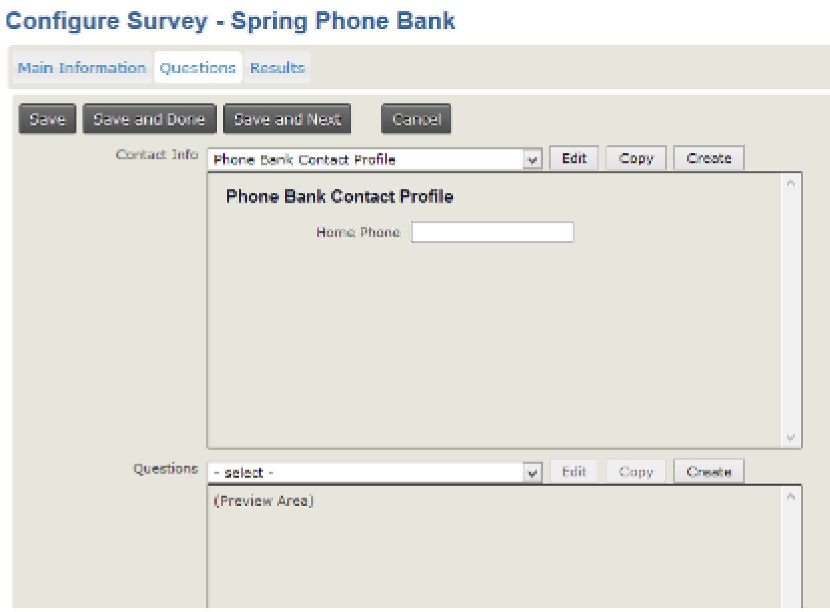
The blank Configure Survey Questions Tab appears with places for two profiles.



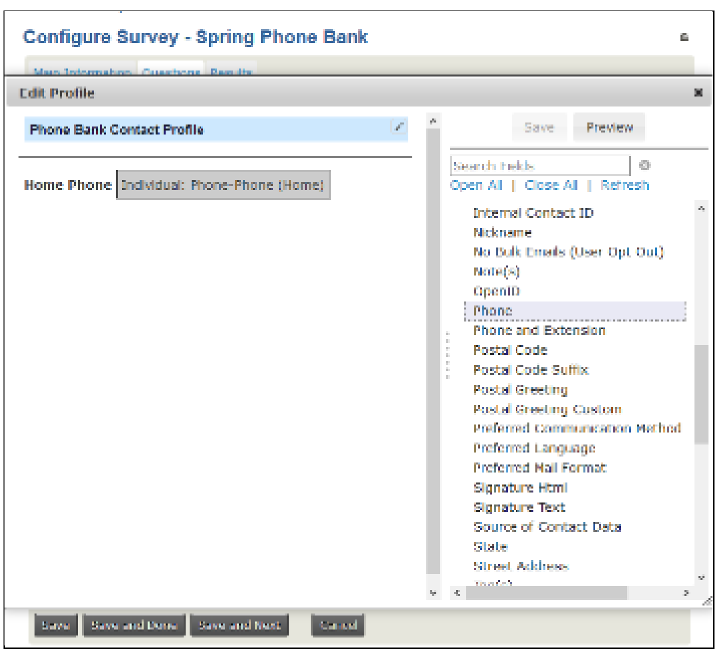
The idea for this page is that you will put the profile that holds the contact fields in the upper section. Select an existing profile in the field next to **Contact Info** to **Edit** or **Copy** or click **Create** to make a new one.

The Contact Info Profile

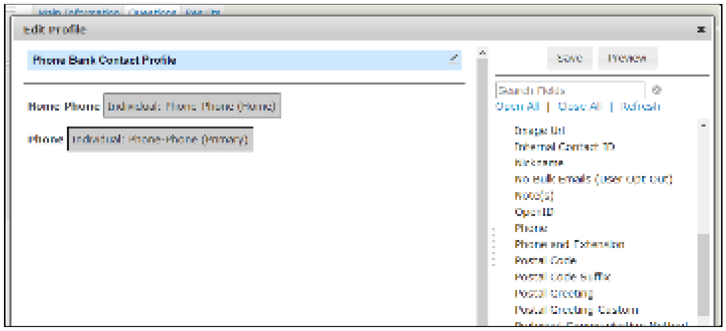
We've select the **Phone Bank Contact Profile** that was created earlier.



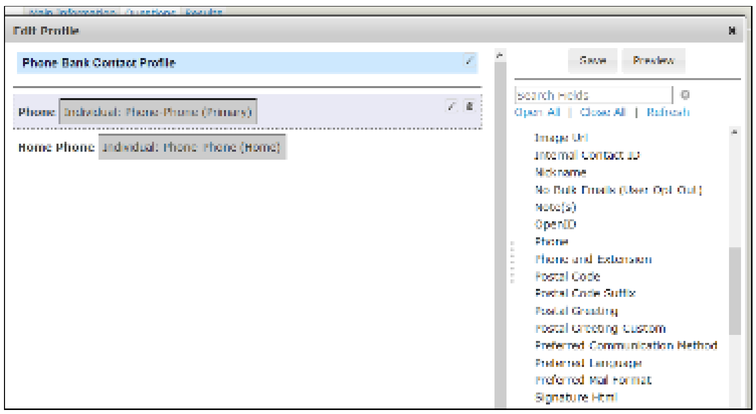
We'd like to edit this profile to have more information and phone numbers. The contact name will appear by default so you needn't add that. We click **edit** to go the profile edit screen. This opens up a window over the survey. In the left window we have the fields currently in the profile. In the right hand window the potential additional fields appear. If we click on the plus sign by **Individual**, we get a list that looks like this screen:



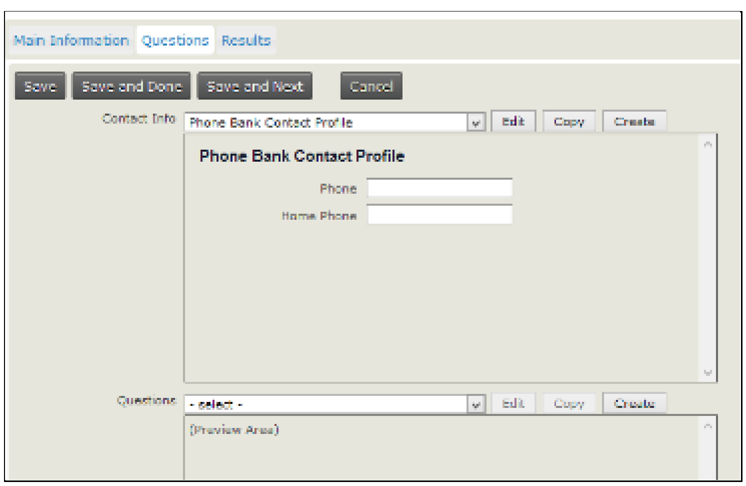
Find phone number on the list and drag it over to the left window. It defaults to the Primary Phone, which is okay, but we'd like it to be first on the list. Just click on it and drag it up.



We see that Primary Phone has moved into place. Clicking on the field also displays the pencil icon – which allows us to edit the field and the label – and the trash can which allows us to remove it from the profile.

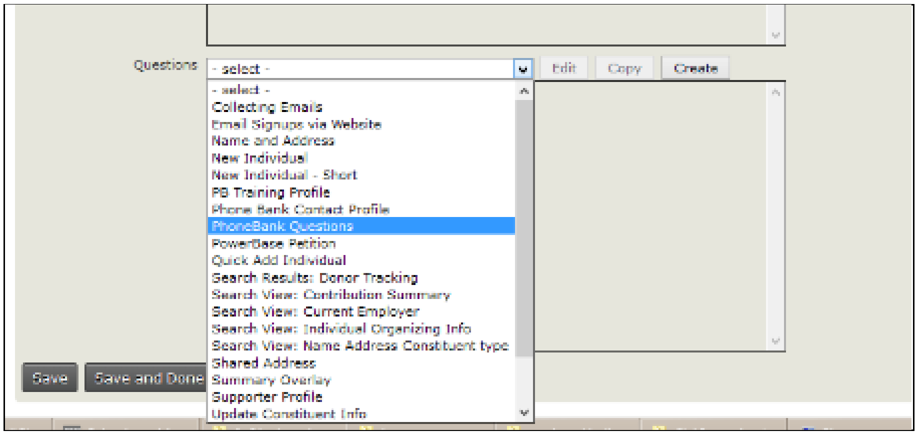


When we're done editing, click on the **Save** button in the upper right corner of the overlay window. We're returned to the original Questions tab, but now our upper window's profile has been changed to add the field.

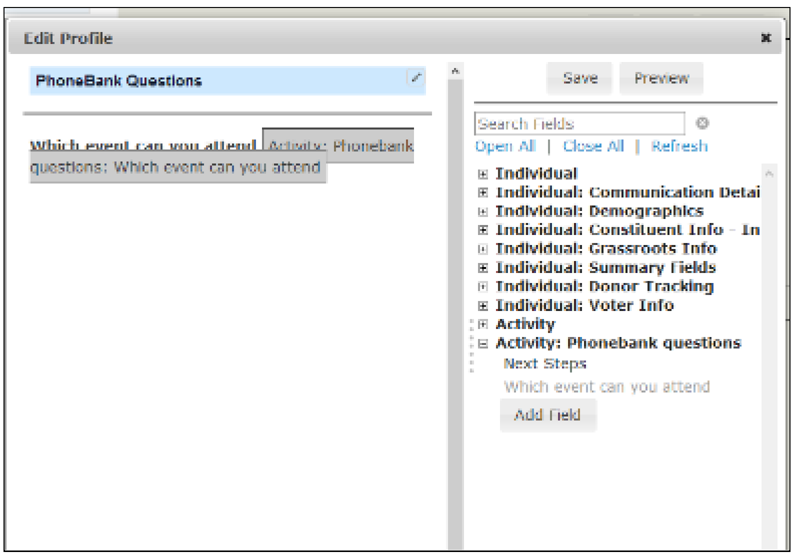


The Questions Profile

In this section you can also edit or copy an existing profile or create a new one. In this example, we going to use an existing one called *PhoneBank Questions*.

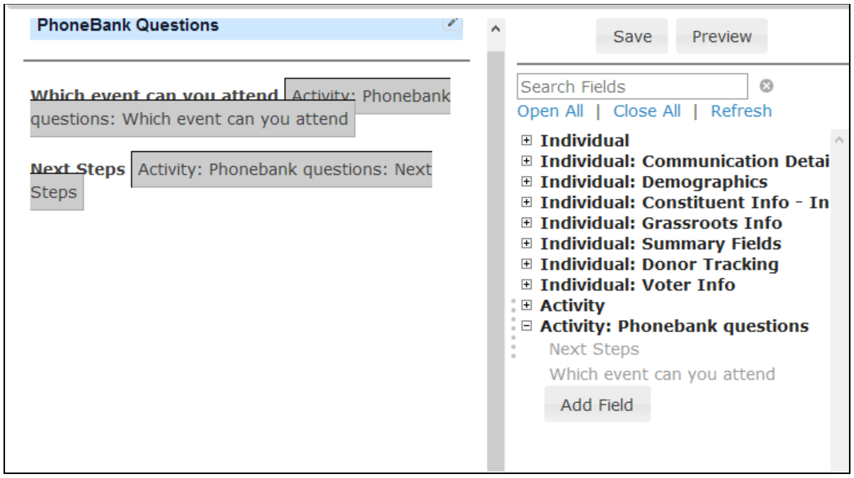


We have a situation similar to what we had before: two windows, profile on the left, fields to select from on the right.

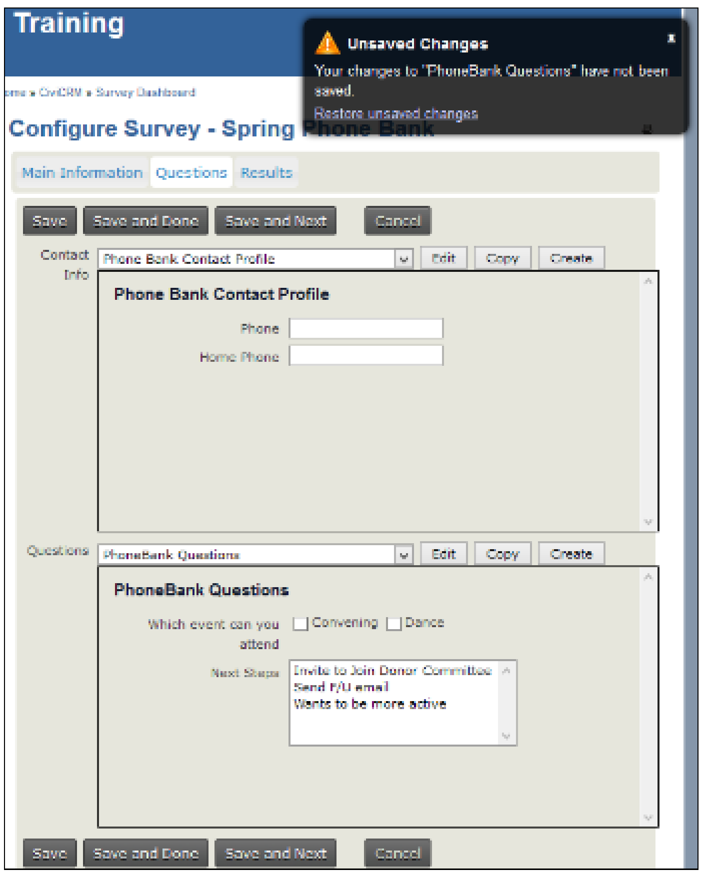


Since these are the questions and questions are stored as a special activity type of PhoneBank, expand the **Activity: Phonebank questions** to get a list of possible fields. If we don't see the one we want, new fields can be added right on this screen. This process has the same result as adding them through the Customize Data and Screens>Custom Fields option on the Administer menu. The new fields created here will be new custom fields in your PowerBase. It's not a good idea to add new fields without discussing it with your colleagues or without checking to make sure they are not already in the PowerBase somewhere else.

We've got a field that's called *Next Steps* that we want to add to the survey. It is a field designed to capture the intermediate term actions someone should take with this contact after the survey is completed. Drag it over and it becomes part of the PhoneBank Questions profile.

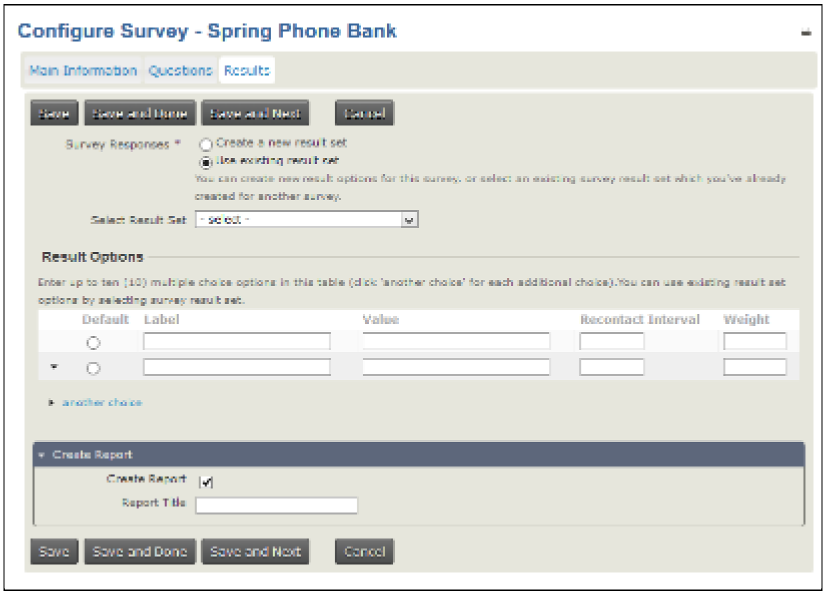


Click Save in the upper right hand corner of the window overlay to close it and continue from the Questions tab.



PowerBase reminds us to save our work, we are done with the profiles anyway, so we click **Save and Next.**

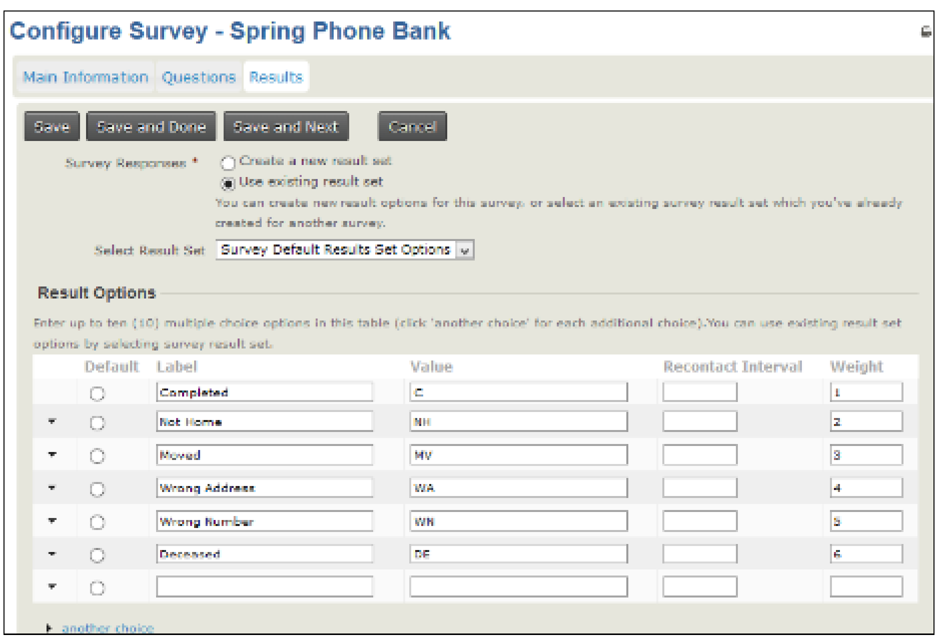
Results Tab



The Results tab holds all the values for the Results field. Every survey has a results tab. It has several functions:

- It can close the phone bank for this contact and mark it complete so that they will not get called again.
- As it closes the survey for this contact, it can track statuses of the survey that can be used for follow up actions
- It can release the contact from the phone bank and allow another person to call again later.

Begin by selecting existing an existing Result set and modifying it for your needs.



The **Recontact Interval** is the number of days to wait before this contact can be contacted for this survey. If it's set to blank or zero, the contact is taken out of the survey pool once the result is recorded. In some cases, that may not be the desired result. Take "Not Home" for example. If the desire is to call the "Not Home" folks back, then setting a number of 1 will make them available to be called the next day. Setting it to 7 will delay it for a week. They will not be taken out of the pool.

Weight controls what order they appear in on the list.

You are not restricted to these results. Imagine a phone bank that was designed to simply find out if the contact was supporting a specific position of the organization. The result set could be Yes or No or Declined to Say. It's good to include the other more general options as well. Phone calls are a good time to clean up the database so using the opportunity to record who moved, bad phone numbers and deceased are perennial result options. The organizer of the phone bank can query the survey results and pull up a list by these statuses or any of the other questions fields.

Create Report option defaults to yes. A report will be created for this survey with the name of the survey. You can override the name by filling in the **Report Title** field.

Clicking Save and Next will bring you back to the original Main Information tab. **Click Save and Done** to end the survey editing.

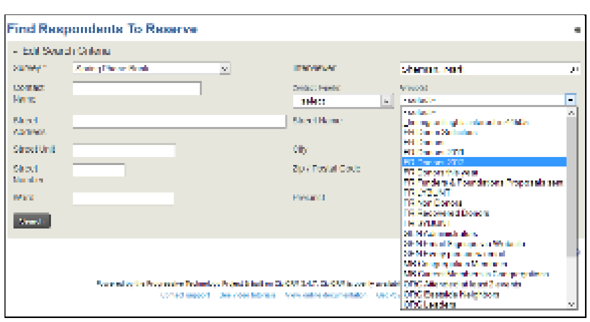
Reserving Respondents

Reserving respondents assigns contacts to an interviewer. When the interviewer logs in to start calling, this is the list of contact that will appear. Respondents will stay reserved until the interviewer calls them or they are manually or automatically released.

Assuming that you've prepared a group of contacts that you are targeting for the phone bank, and that you know who is going to do the calling, the best practice is to reserve them for each caller before the interviewer is waiting to get started.

Pay attention to the release frequency that you've set for this phone bank. If you've set a release frequency of a day, and you reserve them for a phone bank tomorrow, they'll all be released before you get started. To get around that, set the release frequency to a longer period of time so that you have time to get ready for your callers or just reserve them the same day they call.

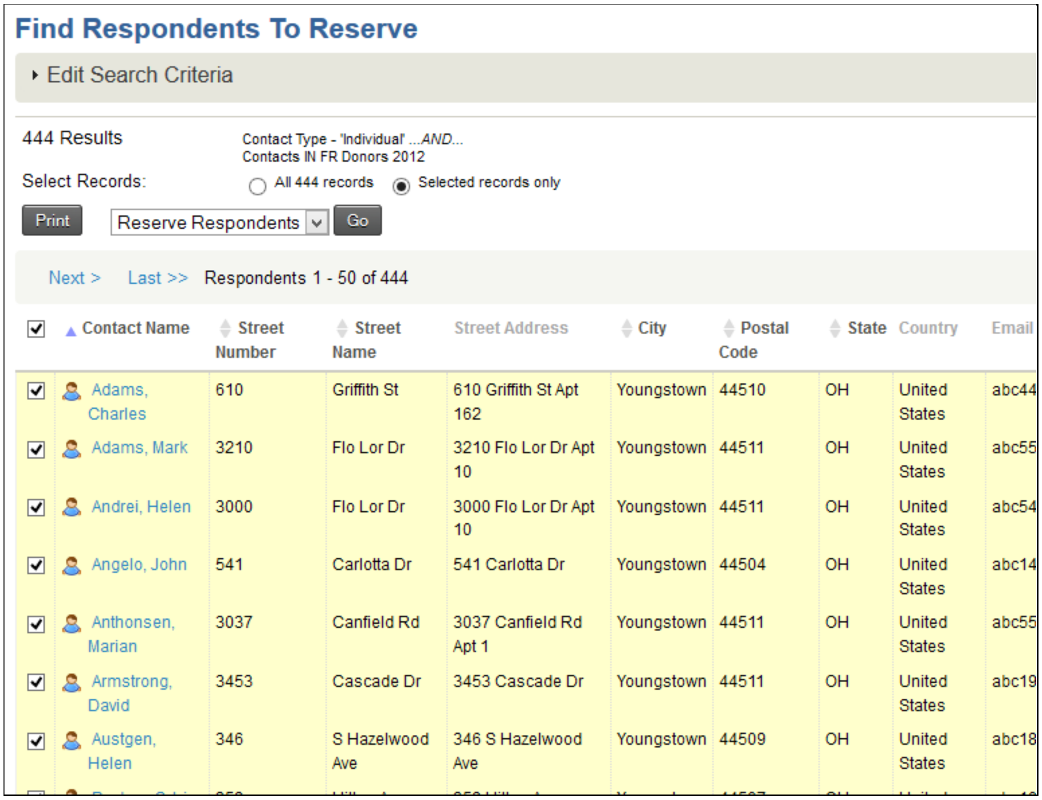
Go to **Campaigns>Reserve Respondents.**



Pick the **survey** that you want.

Pick the **interviewer**. The default will be for yourself unless you change it. The interviewer has to be someone in your PowerBase. It also should be someone who has a login into your PowerBase.

Pick the **group** that in which you want to reserve. Press **Search** which brings you to the search results list.



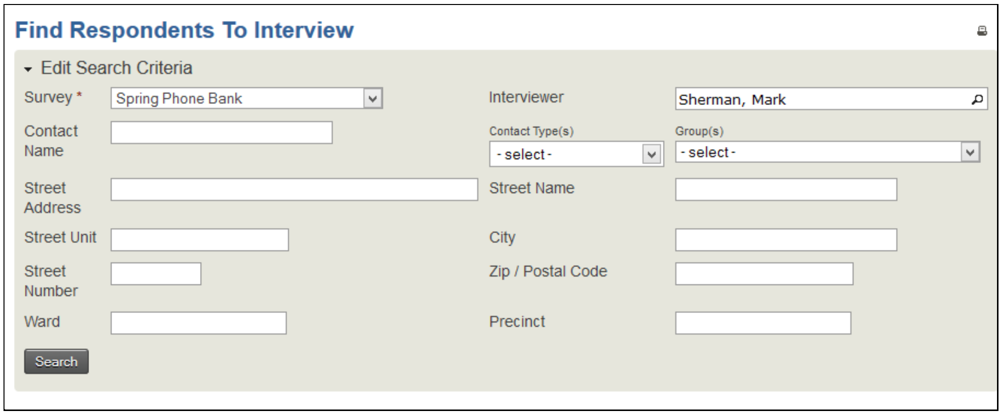
Select the number you want to reserve for this person. The count may be additionally limited by the settings on the survey. Click **Go.**

This brings up the **Reserve Respondents** Screen.

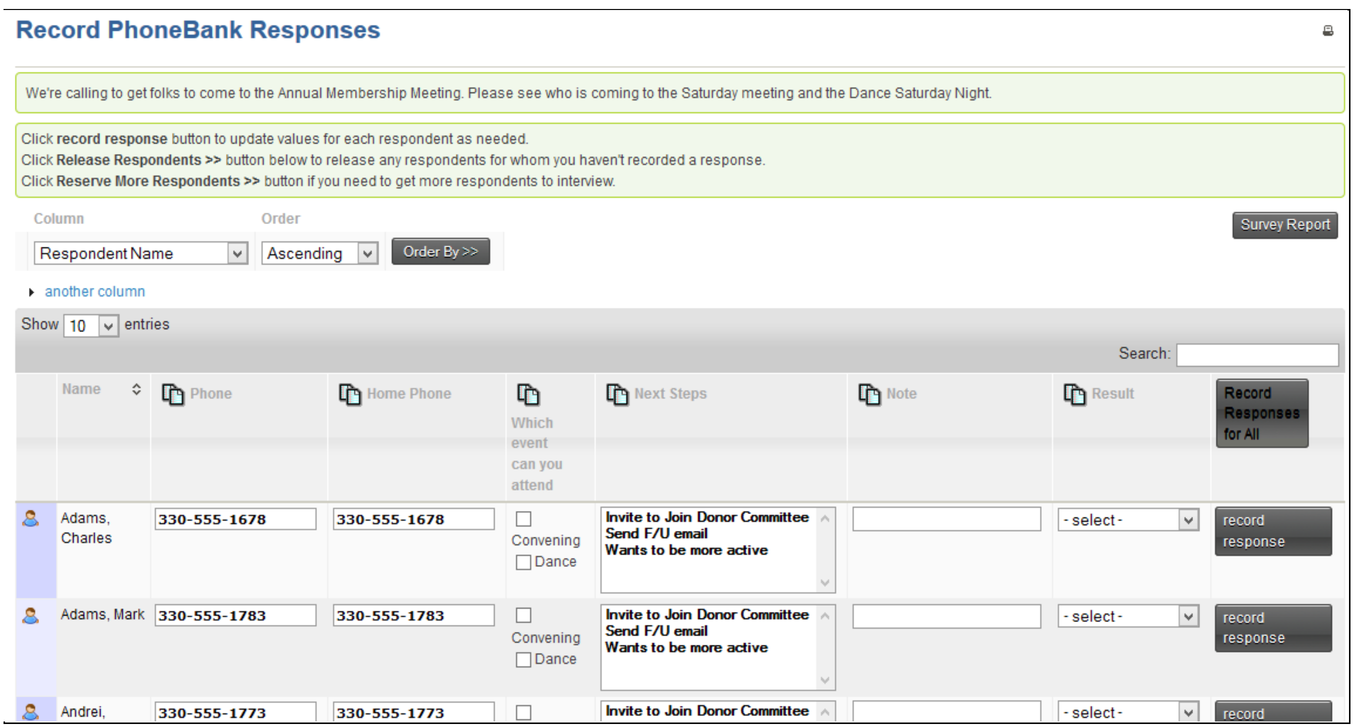
Click **Reserve** if you are reserving for someone else. Click **Reserve and Interview** if you are reserving for yourself and ready to start.

Conducting the Phone Bank

When the time comes to interview, go to **Campaign>Interview Respondents**.



Enter the same **Survey** and **Interviewer** as before and select **Search.**



The result is the list of people to be interviewed. The Interviewer makes the calls, selects appropriate responses including the **Result** and then clicks **record response.** Doing so releases the contact from the reserved set. If the interviewer didn't get a connection, the row can be left and it will remain in the Phone Bank. There is also an option at the bottom of the list to release all the respondents.

Sending Acknowledgment Letters

In CiviCRM, acknowledgment letters for tax-deductible donations are produced as pdf files that can be printed and mailed to your donor. To do this select a donor or donors using Advanced Search, select a template, and create the pdf letter. You can also print mailing labels using the same process. Here are the steps below.

Setup

In CiviCRM you can go to Administer>CiviContribute>Financial Types to see if your Contributions such as **Donations** and **Member Dues** are set up as Tax-deductible. Your aorganization's fincial or administrative staff should be able to decide if the financial type is tax-deductible. To make changes to a Financial type's tax-deductible status, c**lick edit and change the status and save.** If you have further questions as to the mechanics of how to enable changes please call or email the PowerBase support team.

Before printing acknowledgment letters, you'll want to set up a message template with your default settings. While you can create Acknowledgment Letters on the fly, this approach will standardize your work and save you time in the long run. A properly configured template can be reused with little editing. Using the provided template, you can make your own template in advance of the first time you create Acknowledgment Letters.

Templates can be accessed at **Mailings>Message Templates**. They are configured using the html editor that is used for all online pages and emails in PowerBase, the only difference being that they will be printed and not sent as email or displayed in a web browser. They work in conjunction with the default pdf letter size that is set by default. You can override the default size by creating your own Print Page (PDF) format from the option on the System Configuration menu available by going to **Administer>Administration Console.**

The special tokens available for Acknowledgment Letters for Deductible Contributions are:

- Total Deductible Contributions last Year
- Total Deductible Contributions this Year
- Total Deductible Contributions Year Before Last

Since these tokens are generated on a summary field based on a calculation, a unique number will identify them. In the example below, the xxx is where the unique token id number would be.

{contact.custom_xxx}

Remember to adjust font size for best readability. You can either insert your organizational logo in the template or you can create a letter without a logo but leave enough space so that you can print your letter on your organization stationary. Once you have created your template and tested it, you are ready to use it. The PowerBase Support team is available to help with setting up your basic pages if you need it.

Searching for Donors and Printing Acknowledgment Letters

To find Donors and print Acknowledgment Letters,

- Go to **Search>Advanced Search** and scroll down to **Custom Fields>Summary Fields.**
- **Make your selection by choosing from either of the following options:**
  - Total Deductible Contributions last Year
  - Total Deductible Contributions this Year
  - Total Deductible Contributions Year Before Last
- In whichever Total Contribution Field you select, enter a number 1 in the "from" box and leave the "to" field blank in order to give you everyone that contributed at least 1 dollar in that selection. For example, if you wanted a list of all your contacts that gave a tax-deductible contribution last year, you would enter "1" in the FROM field of the Total Deductible Contributions Last Year and leave the "from" field blank. Click on SEARCH.
- The results would be a list of contacts that gave Tax Deductible contributions last year.
- Select All Records, and take the **action** of "Print PDF Letter for Contacts." (NOTE: If you were printing mailing labels you would choose as an action "Mailing Labels.")
- Select the template that you created for Acknowledgment Letters.
- Add the date in the body of the mail.
- Click Make PDF Letters.
- Modify or tweak your letter until it's right.

We recommend that you NOT select the "Update thank-you dates for these contributions" until you have run the thank you letters enough to know that you are comfortable with how the look at print.

When the pdf file is created, open it in acrobat. Select print. Select the option to print the document actual size.

In CiviCRM, Thank You letters are produced as pdf files that can be printed and mailed to your donor. The process is that you select a set of contributions that have not had the thank you date updated, print the mailing labels, then reselect the contributions, select a template, create the pdf letter and update the thank you letter date so that they are not printed again. You can also print mailing labels using the same process.

Setup

Before printing thank you letters, you'll want to set up a message template with your default settings. While you can create Thank You Letters on the fly, this approach will standardized your work and save you time in the long run. A properly configured template can be reused with little editing. In PowerBase, we provide a sample thank you letter format called **Powerbase Thank You Letter Template v1**. It's meant to be a sample layout showing the relevant tokens used in a Thank You Letter. These tokens are only displayed in the token list when you are in the process of sending a thank you letter, which we describe next. Using the provided template, you can make your own template in advance of the first time you create thank you letters.

Templates can be accessed at **Mailings>Message Templates**. They are configured using the html editor that is used for all online pages and emails in PowerBase, the only difference being that they will be printed and not sent as email or displayed in a web browser. They work in conjunction with the default pdf letter size that is set by default. You can override the default size by creating your own Print Page(PDF) format from the option on the System Configuration menu available by going to **Administer>Administration Console.**

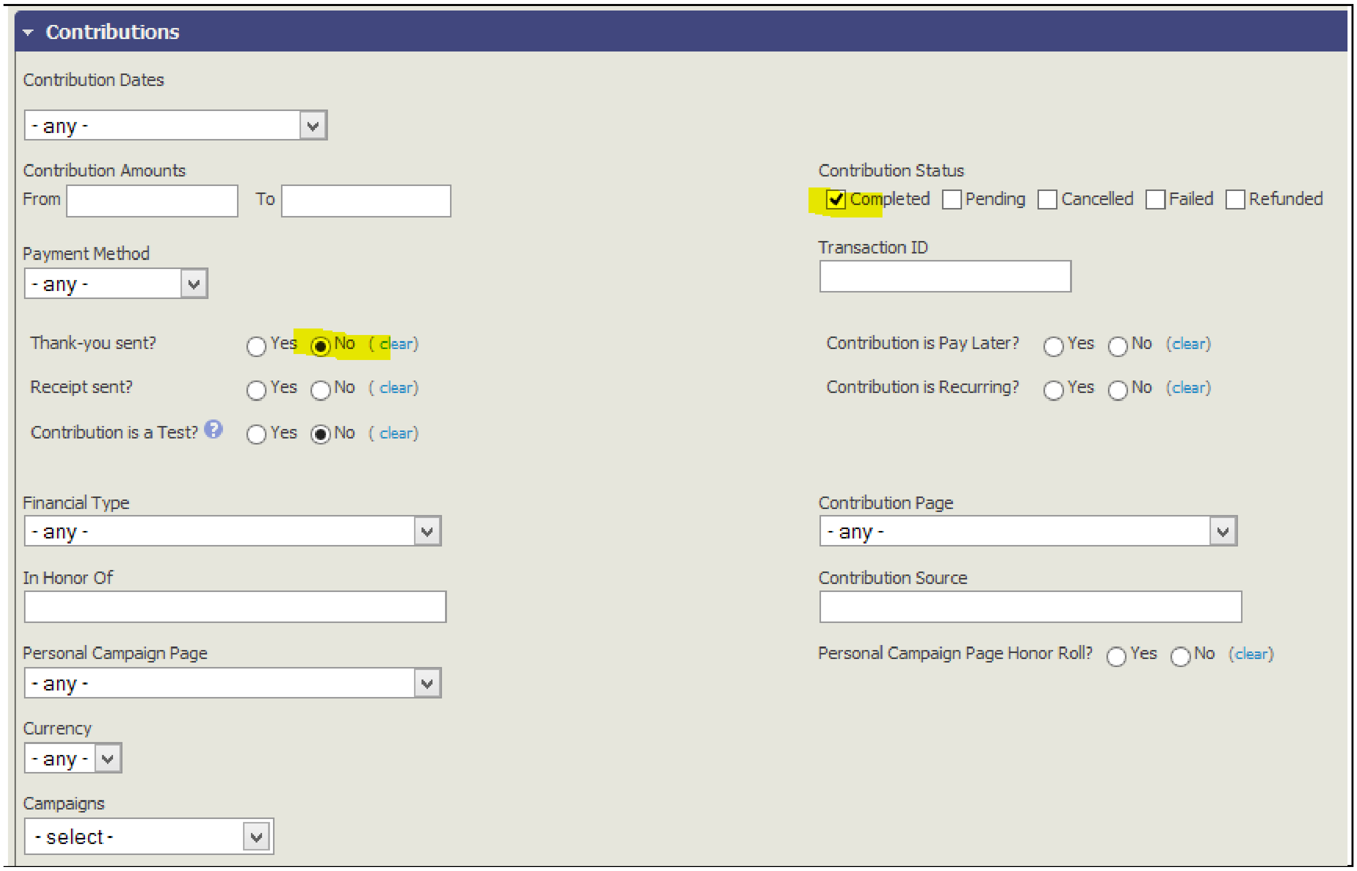
There are special tokens for Thank You Letters that are only populated when you run the Thank You Letter process. They are:

- {contribution.receive_date}
- {contribution.total_amount}
- {contribution.net_amount}
- {contribution.contribution_source}
- {contribution.campaign}

The PowerBase Support team is available to help with setting up your basic pages if you need it.

Printing Mailing Labels

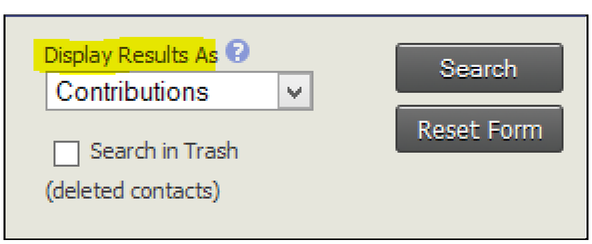
To print the mailing labels, go to **Search>Advanced Search**. Find the **Contributions** "accordion" and expand it. Select completed contributions where "Thank-you sent" is "No". If you have a lot of old ones out there, you can limit the search by date. Press **Search**.



The list you get will be contacts who need a thank you. On the drop down list of Actions, Select "Mailing Labels". Follow the instructions on the subsequent pages to create a PDF of labels. When printing the PDF file, make sure you deselect the option to "resize to fit the page". If you fail to do that, your labels will not align properly.

Printing Thank You Letters

To print Thank You Letters, repeat the search you did above with one change. Go to **Search>Advanced Search**. Find the **Display Results Option** in the first row on the right side. Select the option to display results as Contributions.



Continue the search as before. Find the **Contributions** "accordion" and expand it. Select completed contributions where "Thank-you sent" is "No". If you have a lot of old ones out there, you can limit the search by date. Press **Search** which will bring up a list of contributions for that do not have a thank you date.

1. Select All Records, and take the action of "Thank-yous for Contributions".
2. Select the template that you created for Thank You Letters.
3. Add the date in the body of the mail.
4. Click Make Thank-you Letters.

We recommend that you NOT select the "Update thank-you dates for these contributions" until you have run the thank you letters enough to know that you are comfortable with how the look at print.

When the pdf file is created, open it in acrobat. Select print. Select the option to print the document actual size.