



home

classroom

administration

RenWeb Fundraising PRO Training 3

Reporting Overview

- Embedded Reports
 - Constituent Giving History Screen
 - Pledges Screen
 - Receipts
- Report Manager
- Create A Report
- Email Blast
 - Report must include:
 - “Filed As” field
 - “Email”
- Thank You
 - Mail Merge Template
 - Mail Merge Letter
- Mail Labels
- Support Tools





Embedded Reports

- Giving History Screen
 - Export to Excel
 - Constituent Report
- Pledges
 - Active
 - All Pledges



Report Manager

- Year End Contribution Statements
- Pledge
 - Pledge Summary
 - Outstanding Pledges Summary
 - Pledges by Effort
 - Pledge/Gift Income
- Giving
 - Giving Summary - General vs. Pledge
 - Giving Summary - by Type
 - Giving Summary - by Constituent
 - Giving Summary – by Interest
 - Comparison – by Constituent/Campaign
 - LYBUNT
 - SYBUNT
- Miscellaneous
 - Student Relationships
 - Top 100 Donor Relationships
 - Comprehensive Constituent Report





Create A Report

- Base Type of Report
- Email Blast
- Thank You
- Mail Labels



Support Tools

- Defined Lists
- Relation Types
- Giving Segments
- Gift Reasons
- User Admin
- Utilities
- Import / Export



Support Cont.

- Dynamic Help
- Support Request
- Community Site with documentation



Local vs. Live

- The Live Database works well, especially with ‘smaller’ databases. Once a database exceeds 5,000 constituents, the user may experience lag time when going from screen to screen within the program. Additionally, all users do not have the optimal RAM and CPU speed; this may also cause the interface at times to appear ‘slow’. To combat this it is recommended to utilize the Local Database option.
- Creating a local database on a user’s machine enables the user to move through the program without connecting to the RFP server with each action. This speeds up the process of data entry within in the RFP interface. Replication, connection between the RFP server and the user’s computer, occurs automatically at the time of log in and log out. At any time, the user may choose to manually replicate within the program by going to the menu and clicking on the Replicate icon.